

India Water Treatment Chemicals Market, By Type (Coagulants & Flocculants, Corrosion Inhibitors, Scale Inhibitors, Biocides & Disinfectants, Chelating Agents, Others), By End User Industry (Municipal, Power, Oil & Gas, Mining, Chemical, Food & Beverage, Pulp & Paper, Others), By Region, Competition, Forecast & Opportunities, 2018-2028F

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Abstracts

The India Water Treatment Chemicals Market achieved a valuation of USD 1760.38 million in 2023 and is projected to sustain robust growth with a CAGR of 6.39% through 2029 and is expected to reach at USD 2529.41 million by 2029. The market is poised for substantial expansion during this forecast period. The anticipated growth is primarily driven by the escalating demand from the oil & gas industry. Notably, in 2021, India's crude oil production volume stood at approximately 27.67 million metric tons. The projected expansion of the India Water Treatment Chemicals Market is fueled by the mounting demand from the oil & gas sector. This industry faces a spectrum of water management challenges, necessitating efficient water treatment solutions. These solutions facilitate the industry's increasing adoption of water conservation and reuse practices, thereby minimizing freshwater consumption.

The India Water Treatment Chemicals Market is marked by dynamism and competitiveness, providing avenues for growth and innovation. Market players are actively focusing on expanding their product portfolios, elevating quality standards, strengthening distribution networks, and augmenting their market share. For instance, in 2022, Daiki Axis Japan, a provider of water treatment solutions, announced plans to establish its third plant in southern India, further enhancing its presence. The market also experiences considerable merger and acquisition activity, enhancing companies'

regional footprint. These acquisitions enable firms to better serve customers and address the escalating demand for Water Treatment Chemicals in India.

Key Market Drivers

Rising Demand from the Power Industry

The power industry occupies a pivotal role in India's economy. Thermal power plants, in particular, require substantial water quantities for cooling purposes. Cooling water maintains optimal operating temperatures for power generation equipment like boilers and turbines. To prevent scaling, corrosion, and microbial growth within cooling water systems, water treatment chemicals such as scale inhibitors, corrosion inhibitors, and biocides are essential. The demand for these chemicals in the power industry is rooted in the need to ensure efficient and dependable cooling water systems, thereby minimizing downtime and maximizing power generation capacity. The process of steam generation, integral to power plants, necessitates high-quality boiler feedwater. Effective treatment of this feedwater is vital to prevent scaling, corrosion, and fouling in boilers, which can curtail their efficiency and lifespan. Water treatment chemicals, encompassing oxygen scavengers, pH adjusters, and antiscalants, are employed to optimize boiler water quality and ensure efficient steam generation. The mounting number of power plants in India and the emphasis on operational efficiency drive the demand for water treatment chemicals for boiler water treatment. Furthermore, stringent environmental regulations govern the power industry, aiming to reduce its impact on water resources. Adherence to water quality standards and proper wastewater treatment are imperative for power plants. Water treatment chemicals play a crucial role in treating power plant wastewater, ensuring compliance with regulatory norms. The drive to conform to regulations and minimize ecological impact contributes to the rising demand for water treatment chemicals in the power sector. Additionally, India's water scarcity concerns necessitate sustainable water management practices. Power plants increasingly focus on water conservation, reuse, and recycling. Water treatment chemicals facilitate the treatment and purification of wastewater for reuse in power plant processes, curbing freshwater consumption and relieving pressure on water resources. The emphasis on sustainable water management drives the demand for water treatment chemicals in the power sector. For instance, Ion Exchange (India) Limited manufactures ion exchange resins under the brand name INDION. These resins are used in water treatment and specialty applications in nuclear power plants. The escalating demand for water treatment chemicals in the power industry augments the growth of the India Water Treatment Chemicals Market in the upcoming years.

Growing Demand for Water Treatment Chemicals in the Municipal Sector

Rapid urbanization and industrialization have led to significant demand for water treatment chemicals in the municipal sector. These chemicals are indispensable in municipal water treatment plants for purifying water, disinfection, and maintaining optimal water quality standards. Urban population growth directly correlates with elevated demand for water treatment chemicals in the municipal domain. Many Indian municipalities grapple with aging water supply infrastructure, resulting in challenges in sustaining water quality. Aging pipelines and storage tanks are susceptible to corrosion, which can introduce impurities and contaminants into the water supply. Water treatment chemicals, including corrosion inhibitors, play a pivotal role in mitigating corrosion-related issues, preserving water quality, and ensuring the delivery of safe drinking water. Furthermore, the Indian government has played a pivotal role in fostering the growth of the Water Treatment Chemicals market. Favorable policies and regulations, such as the 'Swachh Bharat Mission' and the 'Atal Mission for Rejuvenation and Urban Transformation (AMRUT),' are significant government initiatives aimed at enhancing water supply and sanitation infrastructure in urban areas. Notably, AMRUT 2.0 is aligned with India's self-reliance initiative (Aatma Nirbhar Bharat) and focuses on making cities 'water secure.' It encompasses water source conservation, water body rejuvenation, recycle/reuse of treated water, and rainwater harvesting, involving community participation. Moreover, waterborne diseases pose a significant public health risk in India, particularly in densely populated urban zones. Contaminated water can harbor harmful microorganisms, bacteria, and viruses, causing ailments like cholera, typhoid, and dysentery. To prevent waterborne diseases and safeguard public health, municipal water treatment facilities rely on water treatment chemicals, including disinfectants and biocides, to eliminate or neutralize pathogens. The rising emphasis on averting waterborne diseases fuels the demand for water treatment chemicals in the municipal sector. Thus, the mounting use of water treatment chemicals in municipal wastewater treatment spurs the growth of the India Water Treatment Chemicals Market in the projected period.

Key Market Challenges

Cost Considerations and Affordability

The diverse economic landscape of India presents a unique challenge in the water treatment chemicals market. The nation's economy encompasses both high-income urban hubs and lower-income rural regions. Ensuring access to affordable water treatment solutions that cater to this economic diversity poses a significant challenge.

Effective water treatment often necessitates substantial investments in infrastructure, including equipment, facilities, and skilled personnel. However, many municipalities and industries, particularly in less developed areas, grapple with limited budgets for water treatment infrastructure. The cost of raw materials used in water treatment chemicals production can be volatile, impacting the affordability of end products. Fluctuations in chemical, mineral, and raw material prices can lead to unpredictable cost variations. Energy costs are a significant component of water treatment operations, especially in processes such as filtration, disinfection, and desalination. Fluctuating energy prices can affect the overall cost-effectiveness of water treatment solutions.

Regulatory Compliance and Standards

The water treatment chemicals industry in India operates within a comprehensive regulatory framework involving various bodies like the Central Pollution Control Board (CPCB) and state pollution control boards. Navigating this complex web of regulations, permits, and approvals poses challenges for manufacturers and suppliers. Compliance with laws such as the Water (Prevention and Control of Pollution) Act and the Environmental Protection Act necessitates a deep understanding of legal obligations and their implications. India's federal structure permits individual states to establish their environmental regulations and standards, leading to regional disparities in compliance requirements. The India Water Treatment Chemicals Market caters to industries with diverse water quality needs, including power generation, textiles, and pharmaceuticals. These sectors face rigorous discharge regulations for treated water to safeguard water bodies and the environment. Ensuring compliance with these stringent standards requires a steadfast commitment to innovation and significant investments in research and development.

Key Market Trends

Adoption of Environmentally Friendly Solutions

Environmental consciousness is driving the adoption of eco-friendly water treatment solutions in India. The principles of green chemistry are gaining momentum in the water treatment chemicals market. Green chemistry emphasizes designing products and processes that minimize environmental impact while upholding performance. Manufacturers are striving to reduce toxicity, minimize waste, and enhance the biodegradability of products, aligning with sustainable chemistry principles. This focus on environmentally friendly solutions is catalyzing innovation in water treatment

technologies. Emerging approaches leverage natural processes and alternative methods to achieve effective water treatment while reducing reliance on chemicals. These advancements promote sustainability and alleviate the chemical burden associated with water treatment processes, offering viable alternatives to conventional chemical treatment methods.

Rising Demand for Potable Water

Chemicals like disinfectants and coagulants play a pivotal role in neutralizing pathogens, removing impurities, and enhancing overall water safety in supply systems. Industries in India, spanning manufacturing to agriculture, heavily rely on water for operations. Water treatment chemicals are indispensable for managing industrial effluents and maintaining water quality for discharge into water bodies. As the country faces challenges stemming from urbanization, population growth, and industrial expansion, effective water treatment becomes crucial. The adoption of innovative water treatment chemicals ensures the availability of safe drinking water, promotes environmental sustainability, and safeguards public health. This trend underscores the crucial role of the water treatment chemicals industry in protecting India's water resources and fostering a healthier, more sustainable future for its citizens.

Segmental Insights

Type Insights

In 2022, the coagulants & flocculants segment dominated the Water Treatment Chemicals market and is expected to continue its expansion in the years ahead. Coagulants and flocculants play a pivotal role due to their essential functions in water purification and treatment. They effectively aggregate and settle impurities such as suspended particles, colloids, and organic matter, enhancing water clarity and reducing turbidity. This efficient removal process improves water safety, making it suitable for consumption. Coagulants and flocculants are equally crucial for industrial and municipal wastewater treatment, aiding in pollutant separation and environmental pollution reduction.

End-User Industry Insights

The municipal segment dominated the Water Treatment Chemicals market in 2022 and is projected to maintain its expansion. Rapid urbanization in India leads to population growth in cities and towns, driving the demand for treated water. Municipalities are

responsible for supplying clean drinking water to these densely populated areas, resulting in elevated demand for water treatment chemicals. Steady chemical supply is vital for maintaining efficient water treatment processes and consistent adherence to water quality standards.

Regional Insights

The West region has emerged as the leader in the India Water Treatment Chemicals Market. West India has experienced substantial urbanization and infrastructure development, resulting in increased demand for clean and safe water. The rapid urban growth fuels the need for efficient water treatment solutions. Consequently, West India has likely witnessed higher adoption of water treatment chemicals to meet urban water supply and wastewater treatment needs. Some states in West India may have implemented proactive policies and initiatives to address water quality and scarcity challenges, stimulating the adoption of water treatment solutions and bolstering the presence of chemical suppliers and manufacturers.

Key Market Players

BASF India Ltd.

Dow Chemical International Pvt. Ltd.

Solvay Specialities India Private Limited

SNF India Pvt Ltd

Thermax Limited

Ion Exchange (India) Limited

Chembond Chemicals Limited, India

Pon Pure Chemicals Group

Mishitek Chemicals

Sicagen India Ltd.

Report Scope:

In this report, the India Water Treatment Chemicals Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Water Treatment Chemicals Market, By Type:

Coagulants & Flocculants

Corrosion Inhibitors

Scale Inhibitors

Biocides & Disinfectants

Chelating Agents

Others

India Water Treatment Chemicals Market, By End User Industry:

Municipal

Power

Oil & Gas

Mining

Chemical

Food & Beverage

Pulp & Paper

Others

India Water Treatment Chemicals Market, By Region:

North

East

West

South

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Water Treatment Chemicals Market.

Available Customizations:

India Water Treatment Chemicals Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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