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North America Water and Wastewater Treatment Chemicals Market By Chemical Type (Coagulant & Flocculant, Biocide & Disinfectant, Corrosion & Scale Inhibitor, pH Adjuster, Others), By End User (Oil & Gas, Pharmaceutical, Chemicals, FMCG, Others), By Region, Competition, Forecast and Opportunities, 2018-2028F

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Abstracts

North America Water and Wastewater Treatment Chemicals Market is anticipated to project robust growth in the forecast period. One key factor contributing to the sustained growth of the water and wastewater treatment chemicals market in North America is the increasing industrialization across the region. With the rapid expansion of industries such as power generation, oil and gas, a significant and manufacturing, there is a significant demand for large volumes of water. However, these industries also produce substantial amounts of wastewater that need to be treated before safe discharge, leading to an escalating need for water and wastewater treatment chemicals.

Furthermore, the market expansion is also driven by the region's stringent environmental regulations. Recognizing the importance of protecting water resources and promoting sustainable practices, both the United States and Canada have implemented regulations that require industries to treat their wastewater before disposal. These regulations not only ensure the preservation of water quality but also contribute to the market growth by creating a mandatory demand for water and wastewater treatment chemicals.

Despite the existing market growth, the future of the North American water and wastewater treatment chemicals market is promising. Ongoing technological

advancements in treatment processes and the increasing emphasis on sustainable practices are expected to propel the market's growth trajectory. As industries and governments continue to prioritize effective water management, the demand for water and wastewater treatment chemicals is likely to remain strong, creating opportunities for further market expansion and innovation.

Key Market Drivers

Growing Demand of Water and Wastewater Treatment Chemicals from Pharmaceutical Industry

Pharmaceutical production processes involve the utilization of a wide range of chemicals, encompassing various stages from synthesis to formulation. Unfortunately, a significant portion of these chemicals ultimately find their way into wastewater. Among the entities of concern are active pharmaceutical contaminants (APCs), which are released into surface water through wastewater treatment systems, giving rise to considerable environmental apprehensions. As a result, the reduction of water consumption and a heightened focus on wastewater treatment have emerged as noteworthy trends within the pharmaceutical industry.

The detection of pharmaceutical residues, their metabolites, and oxidation products in aquatic systems is a matter of growing concern. These remnants have been found in wastewater, surface water bodies, sediments, groundwater, and even in drinking water supplies. The presence of these substances necessitates the implementation of effective wastewater treatment methods to remove or mitigate their impact before the water is discharged or reused.

International organizations such as the Organization for Economic Co-operation and Development (OECD) have been actively advocating for improved waste and wastewater treatment practices to combat the issue of pharmaceutical residues in freshwater systems. This collective drive towards better wastewater treatment aligns with the industry's pressing need for efficient water management solutions, thereby contributing to the escalating demand for water and wastewater treatment chemicals.

As the North American pharmaceutical industry continues to flourish, the demand for effective water and wastewater treatment solutions grows in parallel. This upward trajectory not only highlights the industry's commitment to sustainable practices but also propels the expansion of the water and wastewater treatment chemicals market across the region.

Growing Demand of Water and Wastewater Treatment Chemicals from Chemical Industry

The chemical industry, which encompasses a wide range of sectors and processes, heavily relies on substantial volumes of water for its various operations such as cooling, processing, and cleaning. Consequently, this reliance gives rise to significant quantities of wastewater that necessitate proper treatment before being discharged into the environment. This crucial requirement has led to an exponential increase in the demand for water and wastewater treatment chemicals.

With industrialization rapidly spreading across the globe, new growth opportunities have emerged for manufacturers specializing in industrial wastewater treatment chemicals. As one of the major contributors to industrialization, the chemical industry plays a pivotal role in driving this surging demand. Notably, the need for water treatment chemicals in the chemical industry is not solely driven by operational requirements but also by the ever-increasingly stringent environmental regulations imposed by governing bodies. For instance, both the United States and Canada have implemented regulations mandating industries to treat their wastewater before disposal, thus intensifying the demand for these essential chemicals.

In conclusion, the escalating demand for water and wastewater treatment chemicals from the chemical industry serves as a key driving force behind the growth of the North American market. Considering the industry's operational needs and the mounting regulatory pressures, this demand is projected to continue its upward trajectory, fueling the expansion of the market in the forthcoming years.

Key Market Challenges

Volatility in Price of Raw Materials

The production of water and wastewater treatment chemicals heavily relies on various raw materials, including ammonia, ethanol, and fatty acids. These materials play a crucial role in the manufacturing process, but their prices are subject to volatility due to multiple factors. Market responses to geopolitical events, weather patterns, and changes in demand and supply often contribute to the inherent instability in the prices of these raw materials.

Such price volatility poses significant challenges for the water and wastewater treatment

chemicals industry. Fluctuations in raw material prices directly impact production costs, potentially leading to higher prices for the end product. Consequently, this can affect the competitiveness of companies operating in the market and their overall profitability.

Furthermore, the geographic concentration of raw materials further adds to the complexity of this challenge. Specific regions may possess a greater supply of particular raw materials, making them more vulnerable to disruptions in supply chains caused by factors like political instability or natural disasters.

For instance, let's consider the global waterproofing chemicals market, which shares similar raw materials with the water and wastewater treatment chemicals industry. This market has witnessed oscillating price trends of raw materials due to volatile energy prices, further emphasizing the impact of raw material price volatility in this sector.

Moreover, the industrial revolution and rapid urbanization have significantly escalated the generation of vast quantities of wastewater worldwide. This surge in wastewater production has subsequently amplified the demand for treatment chemicals, further exacerbating the effects of raw material price volatility on the market.

Overall, the water and wastewater treatment chemicals industry grapples with the challenges posed by price volatility in raw materials, necessitating strategic management and adaptation to ensure stability and sustainability in the face of these market dynamics.

Key Market Trends

Growing Investments in Infrastructure Development

Water and wastewater treatment facilities are vital for safeguarding public health and promoting environmental sustainability. However, the current infrastructure in North America is facing significant challenges due to aging and the need for extensive upgrades or replacements. In response to this pressing need, both public and private sectors have ramped up their investments in water and wastewater infrastructure development, recognizing the importance of ensuring efficient operations.

As these investments continue to pour in, the demand for water and wastewater treatment chemicals is poised to surge. These chemicals are indispensable for achieving the desired standards of water and wastewater treatment, serving various purposes like coagulation, disinfection, and pH adjustment. They play a pivotal role in

maintaining the integrity and effectiveness of treatment processes in these facilities.

Furthermore, the global focus on sustainable and smart cities is propelling the adoption of advanced water and wastewater treatment technologies. These cutting-edge technologies often require specialized treatment chemicals to optimize their performance, further driving the growth of the market. With a growing emphasis on environmental consciousness and resource efficiency, the demand for innovative treatment solutions is set to continue its upward trajectory.

The trend of increasing investments in water and wastewater infrastructure development not only fuels the current market growth but also shapes its future prospects. As more funds are allocated towards modernizing and expanding the water and wastewater infrastructure, the demand for treatment chemicals is expected to experience a corresponding rise. This presents a significant opportunity for stakeholders in the industry to contribute to sustainable development and meet the evolving needs of communities.

Segmental Insights

Chemical Type Insights

Based on the category of chemical type, the coagulant & flocculant segment emerged as the dominant player in the North America market for water and wastewater treatment chemicals in 2022. Coagulants and flocculants play a crucial role in the treatment of water by effectively removing suspended solids, organic matter, and various pollutants. The coagulation process begins by introducing coagulants into the water, which neutralize the charges of particles, causing them to come together and form aggregates. To further enhance this aggregation, flocculants are then introduced, promoting the formation of larger clumps, known as flocs. These flocs can be easily separated from the water, resulting in cleaner and clearer water.

Furthermore, the demand for water treatment solutions is intensifying due to the depletion of freshwater resources and the growing awareness regarding the significance of treating wastewater before its discharge into the environment. This increasing emphasis on water treatment is driving the growth of the coagulants and flocculants market, as industries and municipalities recognize the importance of sustainable water management practices.

End User Insights

The oil & gas segment is projected to experience rapid growth during the forecast period. The oil and gas industry is a significant contributor to the generation of produced water, which necessitates proper treatment before disposal or reuse. This water often contains a wide range of contaminants, including salts, oil residues, and chemicals, posing potential risks to both the environment and public health. In response to these challenges, the industry extensively utilizes water and wastewater treatment chemicals to effectively treat this produced water, thereby driving the demand for such chemicals.

Furthermore, when considering the oil and gas industry in North America, particularly in the United States, its magnitude becomes evident. The United States stands as one of the world's largest oil producers and boasts extensive shale gas production. These large-scale operations require substantial quantities of water and wastewater treatment chemicals, contributing significantly to the industry's market dominance.

In addition to the industry's scale, stringent environmental regulations play a crucial role in shaping its dominance. Both the United States and Canada have implemented strict regulations concerning wastewater treatment, mandating industries, including the oil and gas sector, to treat their wastewater to meet specific standards before discharge. This regulatory pressure further fuels the demand for water and wastewater treatment chemicals within the industry.

Regional Insights

United States emerged as the dominant player in the North America Water and Wastewater Treatment Chemicals Market in 2022, holding the largest market share in terms of value. The United States is home to a wide range of industries, including oil and gas, power generation, mining, and manufacturing. These industries are responsible for generating significant amounts of wastewater as a byproduct of their operations. In order to effectively manage and treat this wastewater, the demand for water and wastewater treatment chemicals has been on the rise.

One of the driving factors behind the demand for these chemicals in the United States is the strict environmental regulations governing wastewater discharge. The Clean Water Act (CWA) and the Safe Drinking Water Act (SDWA) impose stringent requirements on industries and municipalities to treat their wastewater to meet specific standards before it is discharged into the environment or used as drinking water. This regulatory pressure not only ensures the protection of the environment and public health but also contributes to the increased demand for water and wastewater treatment chemicals.

Furthermore, the United States boasts a well-developed water and wastewater treatment infrastructure, with many treatment plants across the country utilizing advanced technologies. These advanced treatment processes often require specialized treatment chemicals to achieve optimal results. Moreover, ongoing efforts to upgrade aging water and wastewater systems in the country further contribute to the increased demand for these chemicals.

Key Market Players

Ecolab Inc.

Kurita America, Inc.

BASF Corporation

Kemira Chemicals, Inc.

Solenis LLC

Akzo Nobel, Inc.

Lonza, Inc.

Report Scope:

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

North America Water and Wastewater Treatment Chemicals Market, By Chemical Type:

Coagulant & Flocculant

Biocide & Disinfectant

Corrosion & Scale Inhibitor

pH Adjuster

Others

North America Water and Wastewater Treatment Chemicals Market, By End User:

Oil & Gas

Pharmaceutical

Chemicals

FMCG

Others

North America Water and Wastewater Treatment Chemicals Market, By Region:

United States

Canada

Mexico

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the North America Water and Wastewater Treatment Chemicals Market.

Available Customizations:

North America Water and Wastewater 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

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

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