

Sizing Agents Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028

Segmented By Type (Natural, Synthetic), By Application (Textile, Paper & Paperboard, Cosmetics, Food & Beverage, Others), By Region and Competition

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Abstracts

Global Sizing Agents Market is anticipated to project robust growth in the forecast period. Sizing agents, also known as colorants, are vibrant substances that play a crucial role in enhancing the water-resistant properties of paper. Their primary function is to prevent ink or dyes from permeating the paper fibers and causing smudging or blurring upon contact with water. By applying sizing agents, the paper's surface is fortified, creating a protective barrier against water and ink. This not only preserves the integrity of the paper but also ensures optimal printability by enhancing the smoothness of the paper surface.

Once applied to fabrics or papers, sizing agents act as a defensive shield, repelling water and preventing its absorption. As a result, inks or pigments remain on the surface of the paper or plastic, allowing for high clarity and vibrant illustrations. These agents find application in various industries such as paper manufacturing, textiles, cosmetics, and more. Their desirable characteristics include water resistance and improved liquid penetration control, making them indispensable in these sectors.

In the ever-evolving Sizing Agents Market, customization has become a prominent trend. Rather than applying a one-size-fits-all approach, companies are focusing on tailoring products to specific operational requirements. This approach involves incorporating digitally connected processes to enhance functional efficiency, diversifying

energy sources, and optimizing cost operations. By adopting these strategies, businesses can unlock new opportunities in the Sizing Agents Market.

However, it is essential to acknowledge the challenges posed by uneven market conditions and geographical variations. The recovery of the Sizing Agents Market varies across different end markets and regions, requiring a comprehensive understanding and assessment of the market landscape.

Furthermore, the recent surge in demand for chemicals and supplies to combat the COVID-19 pandemic has led to supply chain disruptions in the Sizing Agents Market. Despite the high prices, there is a shortage of raw materials for other products, impacting the overall market dynamics. Companies that have swiftly increased production capacities to meet the short-term demand resulting from the pandemic should exercise caution in analyzing these unpredictable demand patterns. Post-pandemic transformations in social, economic, trade, and political conditions, along with anticipated environmental regulations, will shape the future trajectory of the Sizing Agents Market.

Key Market Drivers

Growing Demand of Sizing Agents from Textile Industry

Sizing agents are specialized substances that are carefully applied to fibers in the textile manufacturing process. These agents play a crucial role in imparting desired qualities to the fibers, making them more amenable to weaving. By providing resistance to abrasion, reducing hairiness, and increasing strength, sizing agents ensure that the resulting textile products meet the highest standards of quality and durability.

The textile industry is currently witnessing a remarkable surge in growth, fueled by the ever-increasing consumer demand for fashion and Moreover home textiles. Moreover, the proliferation of technical textiles in sectors such as healthcare, construction, and automotive has further contributed to this growth. As the industry expands, there is a parallel rise in the demand for sizing agents, which are essential components in enhancing the performance and longevity of textile products across a wide range of applications.

Furthermore, the ever-evolving fashion trends and the growing emphasis on high-quality fabrics have significantly heightened the need for effective sizing agents in the textile industry. These agents ensure that fabrics retain their desired characteristics, such as

smoothness, colorfastness, and dimensional stability, even after repeated use and laundering.

In conclusion, the escalating demand for sizing agents from the textile industry serves as a significant driver for the global sizing agents market. As this trend persists, it is anticipated to foster further growth and evolution in the market, as manufacturers continually innovate to meet the evolving needs and preferences of the industry and its consumers.

Growing Demand of Sizing Agents from Food & Beverage Industry

Sizing agents are those substances that are frequently utilized in the modification of surface properties of various materials, thereby making them more suitable for specific applications. In the dynamic and ever-evolving food & beverage industry, sizing agents play a pivotal role in enhancing not only the texture, consistency, and appearance but also the overall sensory experience of a wide range of products.

The remarkable growth of the food & beverage industry can be attributed to a multitude of factors, including evolving consumer preferences, an expanding global population, and an increasing emphasis on food safety and quality standards. This exponential growth has created a surge in demand for sizing agents, which are indispensable in maintaining the desired quality, stability, and extended shelf-life of food & beverage products.

For instance, in the production of sauces, dressings, and bakery products, sizing agents are used to considerably improve not only the viscosity, texture, and stability but also the mouthfeel and overall palatability. Furthermore, they play a vital role in the production of beverages such as beer and wine, where they are utilized to enhance clarity, prevent sedimentation, and contribute to an enhanced sensory experience for consumers.

In conclusion, the escalating demand for sizing agents from the thriving food & beverage industry serves as a significant driver for the continuous growth and evolution of the global sizing agents market. As this trend persists, it is anticipated to further contribute to the expansion and diversification of the market, catering to the ever-changing needs and preferences of consumers worldwide.

Key Market Challenges

Volatility in Price of Raw Materials

The volatility in raw material prices significantly impacts the cost of producing sizing agents. For instance, cellulose, a key raw material used in the production of carboxymethyl cellulose (CMC), a commonly used sizing agent, can experience significant fluctuations in price. These fluctuations can pose challenges for the market, as they directly influence the cost of CMC production. Similarly, the emulsion sizing agent market also faces challenges due to the volatility in raw material prices.

There are several factors that contribute to the volatility in raw material prices. Supply disruptions, such as natural disasters or production issues, can lead to sudden price spikes or shortages. Additionally, pent-up demand or significant peaks and troughs in commodity prices can further exacerbate price volatility. Moreover, geopolitical tensions, environmental regulations, and changes in trade policies can introduce uncertainties and fluctuations in the price of raw materials.

By understanding and navigating these complexities, companies in the sizing agent market can better anticipate and adapt to the challenges posed by price volatility, ensuring a more stable and sustainable supply chain.

Key Market Trends

Evolution in Paper Industry

Sizing agents, also known as paper additives, play a critical role in the paper manufacturing process. They are chemical substances that are used to control the water-absorbing quality of the paper, ensuring it has the desired level of resistance to water. This not only improves the printability and writability of the paper but also enhances its durability and longevity, making it suitable for a wide range of applications.

Over the years, the paper industry has experienced significant changes driven by environmental concerns and the growing need for sustainable practices. As a result, there is a rising demand for eco-friendly paper products that have a reduced environmental impact. This shift in consumer preferences has led to the adoption of sustainable sizing agents in the paper manufacturing process.

The evolution in the paper industry towards sustainability has been a driving force behind the increasing use of environmentally friendly sizing agents. Manufacturers are now focusing on the development of bio-based sizing agents that not only meet the

functional requirements of the paper but also align with their sustainability goals. These bio-based sizing agents are derived from renewable sources such as plant fibers, making them a more sustainable alternative to traditional sizing agents.

Furthermore, advancements in technology have played a significant role in the development of more efficient and effective sizing agents. New manufacturing processes and innovative formulations have improved the performance of sizing agents, leading to enhanced paper quality and increased production efficiency. This has further fueled the growth of the global sizing agents market, as manufacturers strive to meet the evolving needs of the paper industry.

In conclusion, the evolution in the paper industry, characterized by a shift towards sustainability and technological advancements, is a key trend in the global sizing agents market. As the paper industry continues to evolve, driven by environmental concerns and consumer demand for eco-friendly products, it is expected to shape the dynamics of the sizing agents market in the coming years. Manufacturers will continue to innovate and develop new sizing agents that not only meet the functional requirements of the paper but also contribute to a more sustainable and environmentally friendly paper industry.

Segmental Insights

Type Insights

Based on the category of type, the natural segment emerged as the dominant player in the global market for sizing agents in 2022. The high demand for natural sizing agents is attributed to their superior environment-friendly properties. These sizing agents, derived from renewable sources such as plants, are finding widespread use in various industries including textiles, paper, and cosmetics. Their eco-friendly nature and sustainable production methods make them highly desirable for companies aiming to reduce their environmental impact.

In the textile industry, natural sizing agents offer numerous benefits. For example, corn starch, as reported in a May 2020 journal by Multidisciplinary Digital Publishing Institute, has been successfully used as a sizing agent in cotton yarn. This implementation has shown to improve the physical and mechanical properties of the yarn. Such findings highlight the potential of natural sizing agents to enhance the quality and performance of textile products.

Moreover, the research and development efforts by market players and research organizations are focused on exploring the broader applications of these sizing agents. As a result, synthetic sizing agents such as maleic anhydride, modified polyesters, and carboxylic group sizing agents are also expected to witness significant demand in the forecast period.

Overall, the increasing adoption of natural sizing agents and the ongoing exploration of their properties and applications will contribute to their growing demand, both in traditional industries and emerging sectors.

Application Insights

The textile segment is projected to experience rapid growth during the forecast period. Sizing agents play a crucial role in the textile industry, providing essential protection to various yarns and preventing breakage during the weaving process. This not only enhances efficiency but also reduces machinery downtime. With the global demand for textiles on the rise, the need for sizing agents is expected to increase significantly. For example, according to a report by The Cotton Textiles Export Promotion Council (TEXPROCIL) in February 2021, the Ministry of Industry and Commerce in Paraguay announced plans to invest \$1.1 million in the manufacturing sector, particularly benefiting industries such as textiles, clothing, and footwear. This investment is aimed at improving assembly operations and boosting the overall growth of the sector.

Similarly, as stated in the November 2021 US Export Markets report by trade.gov, Spain and Germany experienced substantial textile and apparel imports in September 2021, amounting to US\$ 255,582 thousand dollars and US\$ 45,471 thousand dollars respectively. These figures represent a significant increase from the previous year's imports of US\$ 235,650 thousand dollars and US\$ 3,827 thousand dollars for the same month. The continuous growth in textile production and export on a global scale is expected to drive the demand for sizing agents in the forecast period, as these agents are essential for maintaining the quality and integrity of textiles.

In addition to the textile industry, the paper industry is also anticipated to witness a significant demand for sizing agents in the forecast period. As the demand for various paper products continues to grow, sizing agents will play a vital role in improving the strength and durability of paper, ensuring optimal performance in various applications.

Overall, the increasing global production and export of textiles, coupled with the expanding paper industry, are projected to drive the growth of the sizing agents market

in the foreseeable future.

Regional Insights

Asia Pacific emerged as the dominant player in the Global Sizing Agents Market in 2022, holding the largest market share in terms of value. The high demand for sizing agents in the region can be attributed to the rapid expansion of the textile industry. Countries like China, India, and Japan have emerged as leaders in the global textile market, with significant growth and development occurring in their respective textile sectors. For instance, according to a report by the India Brand Equity Foundation in April 2021, the Indian technical textiles market is projected to reach a value of US\$ 23.3 billion by 2027. To further promote the technical textiles segment, the Indian government has implemented major initiatives and reforms.

Similarly, as stated in a September 2020 report by fashionabc.org, China accounted for a record-breaking 39.2% of global textile exports in 2019. This remarkable growth in the region's textile industry is expected to fuel the demand for sizing agents in the forecast period.

Moreover, the European region is also anticipated to witness a significant surge in demand for sizing agents. The region's textile industry, known for its quality and craftsmanship, is poised for further expansion, creating opportunities for the sizing agents market.

Overall, the expanding textile industry in countries like China, India, and Japan, along with the potential growth in the European region, will undoubtedly contribute to the increasing demand for sizing agents in the forecast period.

Key Market Players

BASF SE

Pulcra Chemicals GmbH

Kemira OY

Solenis LLC

Buckman Laboratories International, Inc.

Seiko PMC Corporation

Evonik Corporation

Avebe UA.

Harima Chemicals Group, Inc.

Indokem Ltd.

Report Scope:

In this report, the Global Sizing Agents Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Sizing Agents Market, By Type:

Natural

Synthetic

Sizing Agents Market, By Application:

Textile

Paper & Paperboard

Cosmetics

Food & Beverage

Others

Sizing Agents Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Sizing Agents Market.

Available Customizations:

Global Sizing Agents 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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