

Super Absorbent Polymer Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Raw Material Type (Sodium Polyacrylate, Polyacrylamide Co-Polymer, Others), By Application (Disposable Diapers, Adult Incontinence, Female Hygiene, Others), By Region and Competition

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Abstracts

Global Super Absorbent Polymer Market has valued at USD 9.21 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.35% through 2028. Super absorbent polymers (SAPs) are a fascinating type of polymer known for their hydrophilic networks that can absorb a significant amount of water. They are created using chemically modified starch, cellulose, and other polymers like polyethylene oxide (PEO) and polyvinyl alcohol (PVA). These polymers possess a remarkable affinity for liquid and exhibit hydrophilic properties.

One of the distinguishing features of SAPs is their unique cross-linked structure, which causes them to swell upon contact with water. This property makes them highly effective for applications that require water absorption. There are two common forms of super absorbent polymers: sodium polyacrylate and polyacrylamide copolymer. These polymers find widespread use in various industries such as personal care, healthcare, agriculture, horticulture, automotive, construction, packaging, entertainment, and industrial water.

The agricultural sector, in particular, benefits from the high water absorption capacity of SAPs. They have proven to be valuable for enhancing water retention in soil, leading to improved crop yield and water conservation. To further enhance their efficacy in agricultural applications, companies in the Superabsorbent Polymers Market are

focusing on enhancing their acrylic acids and cross-linking agents such as potassium. Moreover, the biodegradable and non-toxic nature of polyacrylates makes them an excellent choice for agricultural use.

Hydrogels, which are made from a variety of monomers, are closely related to SAPs and are primarily composed of acrylics. In the industrial manufacturing of hydrogels, acrylic acid (AA) and its sodium or potassium salts are commonly utilized. The versatility of acrylic acid allows for the production of hydrogels with unique properties for various applications.

In the consumer market, the baby diaper industry accounts for a significant portion of the Superabsorbent Polymers Market, with North America being the largest producer of diapers. The demand for infant diapers is driven by factors such as rising birth rates, disposable incomes, and growing awareness of hygiene in regions like the Middle East and Africa, as well as Asia-Pacific, particularly in India and China. This increasing demand is expected to further boost the demand for superabsorbent polymers in these regions.

As governments worldwide focus on creating solutions for adult incontinence in collaboration with manufacturers and medical professionals, the use of adult incontinence products is being encouraged. Government initiatives in countries like the United States, the United Kingdom, Germany, and Australia aim to address the rising incidence of adult incontinence. SAPs play a crucial role in providing effective solutions for adult incontinence due to their high water absorption capacity.

While several methods for detecting and quantifying waterborne infections have been developed, the implementation of these approaches is often hindered by the low pathogen concentrations in natural waterways, as stated by the National Center for Biotechnology Information (NCBI). Efforts are being made to overcome these challenges and improve water quality monitoring systems.

In conclusion, super absorbent polymers offer a wide range of applications and benefits, from enhancing agricultural practices to improving hygiene products. The continuous advancements in the field of polymer science and the growing awareness of the importance of water conservation and efficiency drive the demand for superabsorbent polymers in various industries.

Key Market Drivers

Growing Demand of Super Absorbent Polymer from Construction Industry

In the construction industry, super absorbent polymers (SAPs) are widely employed for their remarkable water-retaining properties. These polymers play a vital role in the production of concrete, where they contribute to enhancing the durability and longevity of structures by effectively controlling the internal curing process. By retaining water and gradually releasing it over time, SAPs significantly contribute to the development of stronger and more resilient concrete structures.

Furthermore, the applications of SAPs extend beyond concrete production. They are also extensively used in geotechnical applications, such as soil conditioning and erosion control. Their exceptional absorption capacity allows them to retain moisture in the soil, promoting healthy plant growth and preventing soil erosion. This not only helps in creating a sustainable environment but also contributes to the overall stability of various construction projects.

As the construction industry continues to strive for innovative materials that enhance efficiency and sustainability, the demand for super absorbent polymers is predicted to witness further growth. Ongoing research and development efforts are expected to uncover new and exciting applications for SAPs in construction, which will further fuel the expansion of the market.

In conclusion, the growing demand for super absorbent polymers from the construction industry is playing a crucial role in driving the global super absorbent polymer market. As these remarkable materials continue to demonstrate their immense value across various applications, the future looks exceptionally promising for the SAP market.

Growing Demand of Super Absorbent Polymer from Medical Industry

Super absorbent polymers (SAPs) are remarkable materials known for their exceptional ability to absorb and retain large volumes of liquid in relation to their own mass. This unique property has led to their wide range of applications across various sectors, including personal care, agriculture, construction, and the ever-growing medical industry.

Within the medical field, SAPs have become indispensable due to their high absorbency and biocompatibility. One of their primary applications is in wound dressings, where their excellent fluid absorption properties help create a clean and moist environment, promoting faster healing. Moreover, SAPs are extensively used in the production of

disposable hygiene products such as adult incontinence items and sanitary napkins, thanks to their rapid fluid absorption and retention capabilities, making them ideal for these specific applications.

More recently, researchers have started exploring the potential of SAPs in drug delivery systems. These polymers show promise in effectively and safely delivering drugs, which could potentially revolutionize treatment strategies for various medical conditions. The versatility and adaptability of SAPs make them an exciting area of research and development in the medical field.

In conclusion, the increasing demand for super absorbent polymers from the medical industry is playing a pivotal role in driving the global super absorbent polymer market. As SAPs continue to demonstrate their value and effectiveness in various medical applications, the future appears bright for the SAP market, with ongoing advancements and innovations on the horizon.

Key Market Challenges

Volatility in Availability of Raw Materials

Super absorbent polymers (SAPs) are fascinating materials known for their remarkable ability to absorb and retain significant amounts of liquid compared to their own mass. This unique characteristic makes them incredibly versatile and widely used across various industries. For instance, in personal care products, SAPs are employed to enhance the absorbency and leakage prevention of diapers and adult incontinence products. In the medical field, they play a crucial role in wound dressings and surgical pads, where they help to keep the wounded area dry and promote faster healing. Even in the construction industry, SAPs are utilized to improve the properties of concrete, such as its durability and resistance to cracking.

However, one of the main challenges faced by the SAP market is the volatility in the prices and availability of raw materials, particularly acrylic acid, which is the primary component used in the production of SAPs. The prices of acrylic acid tend to fluctuate due to various factors, including changes in the petroleum industry, as it is derived from petrochemicals. These price fluctuations can pose significant challenges to manufacturers, as they directly impact the cost of producing SAPs. Moreover, disruptions in the availability of raw materials, logistical challenges, and reduced production can further exacerbate this issue, potentially leading to increased costs for manufacturers. Ultimately, these increased costs may be passed on to consumers,

which could potentially impact the overall growth and stability of the SAP market.

Key Market Trends

Increase in Efforts to Improve Absorption Speed

The absorption and release properties of superabsorbent polymers (SAPs) are influenced by various factors, including solution concentration, temperature, and ionic strength. Recent trends indicate a growing emphasis on research and development aimed at enhancing these properties, particularly the absorption speed.

By improving the absorption speed, SAPs can offer increased effectiveness in a wide range of applications. For example, in personal hygiene products, faster absorption can significantly enhance user comfort and protection. In the medical field, quicker absorption has the potential to facilitate wound healing processes by creating a clean and moist environment for optimal recovery.

The drive to enhance absorption speed is expected to have a positive impact on the SAP market. Not only does it improve the performance of existing products, but it also opens up new possibilities for innovative applications. This evolution in product quality and versatility is likely to stimulate the demand for SAPs, leading to further market growth.

In conclusion, the pursuit of improving the absorption speed of superabsorbent polymers is emerging as a significant trend in the global SAP market. As these efforts continue to progress and yield positive results, they are poised to drive the expansion of the market in the years to come.

Segmental Insights

Raw Material Type Insights

Based on the category of raw material type, the sodium polyacrylate segment emerged as the dominant player in the global market for super absorbent polymer in 2022. The significant growth of polyacrylate/polyacrylamide copolymer super absorbent polymers is accredited to their remarkable ability to absorb several hundred times their own mass in water and other liquid mixtures. This unique characteristic makes them highly effective in various applications, such as agriculture, hygiene products, and wastewater treatment. As a result, these super absorbent polymers are projected to experience a

substantial Compound Annual Growth Rate (CAGR) during the forecast time-frame, reflecting the increasing demand and wide range of potential uses for this innovative material.

Application Insights

The female hygiene segment is projected to experience rapid growth during the forecast period. The growing adoption of SAP (Super Absorbent Polymer) in the manufacturing of baby diapers, female hygiene products, as well as adult hygiene products, has been a significant contributing factor to its increased usage across leading countries worldwide. Moreover, the industrial grade segment is expected to expand at a noteworthy compound annual growth rate (CAGR) during the forecast period. This growth can be attributed to the rising demand for SAP from agricultural industries across the globe, where it finds applications in various agricultural products and practices.

Regional Insights

Asia Pacific emerged as the dominant player in the Global Super Absorbent Polymer Market in 2022, holding the largest market share in terms of value. In terms of geography, the super absorbent polymers market is predominantly dominated by the Asia Pacific region. This is primarily due to the escalating demand from the personal care and agricultural industries for various end-use applications, particularly in the countries of India, China, and Japan. Within the Asia Pacific region, the market for super absorbent polymers in China is projected to hold a prominent position in terms of revenue. This can be attributed to several factors including rapid industrialization, a substantial agriculture sector, continuous technological advancements, a growing birth rate, and an overall improvement in living standards. These factors collectively contribute to the significant growth of the target market in the APAC region.

Key Market Players

BASF SE

EVONIK INDUSTRIES AG

KAO CORPORATION

LG CHEM LTD.

SANYO CHEMICAL INDUSTRIES, LTD.

SUMITOMO SEIKA CHEMICALS CO., LTD.

NIPPON SHOKUBAI CO., LTD.

XITAO POLYMER CO., LTD.

Yixing Danson Technology Co.

ZHEJIANG SATELLITE PETROCHEMICAL CO., LTD

Report Scope:

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

Super Absorbent Polymer Market, By Raw Material Type:

Sodium Polyacrylate

Polyacrylamide Co-Polymer

Others

Super Absorbent Polymer Market, By Application:

Disposable Diapers

Adult Incontinence

Female Hygiene

Others

Super Absorbent Polymer 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 Super Absorbent Polymer Market.

Available Customizations:

Global Super Absorbent Polymer 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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