

# **Textile Chemicals Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Colorants, Auxiliaries, Others), By Application (Technical Textiles, Home Textiles, Apparels, Others), By Region and Competition**

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## **Abstracts**

Global Textile Chemicals Market has valued at USD27.28 billion in 2022 and is anticipated to project robust growth with a CGAR of 4.73% through 2028. Textile chemicals are specialized chemical compounds utilized for various processes in the textile industry, including processing, pretreatment, dyeing, and refining fabrics. They play a crucial role in enhancing the overall finish and properties of textiles. These chemicals encompass a wide range of compounds, such as wetting agents, detergents, emulsifiers, sizing components, de-sizing agents, dye carriers, dye retarding or leveling compounds, dye fixing agents, and rubbing fastness improvers. Additionally, they consist of water repellents or proofing agents, such as fluorocarbons (PFAS), synthetic waxes, and silicones. These chemical additives are primarily incorporated during scouring, bleaching, and printing steps to improve the quality, appearance, and durability of fabrics.

Textile chemicals offer a multitude of benefits to the textile industry. They provide flame resistance, crease resistance, wrinkle resistance, and stain resistance properties, ensuring that the fabrics retain their quality and prints even after prolonged use. Moreover, they are known for their antimicrobial properties, which enhance the performance and lifespan of textile materials. By preventing the production of odors and reducing the occurrence of skin rashes, these chemicals contribute to the overall comfort and well-being of users.

In addition to their functional properties, textile chemicals also play a vital role in the

aesthetic appeal of textiles. Optical brightening agents (OBA) are used to achieve a clean white finish on fabrics, creating a blank canvas for vibrant prints and patterns. These OBAs come in various tints, including blue, violet, and red, allowing for a wide range of design possibilities.

The market for textile chemicals is influenced by several factors. The increasing demand for apparel with trendy designs and prints drives the employment of textile chemicals. Moreover, the adoption of social media influencer marketing by textile and apparel companies has further boosted the market. The influence of celebrities on fashion styles has also led to rapid changes in trends worldwide. Additionally, the rise of fast fashion brands offering fashionable clothes at affordable prices has contributed to the growth of the market.

Furthermore, there is a growing preference among consumers for durable and unique clothing items from luxury brands and foreign textile companies, which has further fueled the market. In response to the rising awareness of environmental sustainability, clothing brands are increasingly opting for clean and sustainable bio-based textile chemicals. These bio-based chemicals are non-toxic and do not cause bioaccumulation in the environment, aligning with the demand for eco-friendly practices.

The application of textile chemicals extends beyond the fashion industry. They are extensively used in the manufacturing of automobile fabrics, such as seat belts, seat covers, and headliners, contributing to the growth of the market. Additionally, the demand for textile chemicals is catalyzed by the growing popularity of home décor items like curtains, carpets, bedsheets, pillow covers, and sofa covers.

Overall, textile chemicals are indispensable in the textile industry, enhancing the quality, performance, and aesthetics of fabrics while addressing the evolving demands of consumers and the market.

## Key Market Drivers

### Growth in Urbanization and Rising Disposable Income

Textile chemicals play a crucial and multifaceted role in the production of various types of fabrics and clothing materials. They are indispensable in different stages of textile production, including pretreatment, dyeing, printing, and finishing. By meticulously enhancing the durability, color vibrancy, texture, and other essential properties of textiles, these chemicals significantly contribute to the overall quality and visual appeal

of the final products.

In the face of rapid urbanization, the demand for high-quality textiles has experienced a substantial surge. As cities continue to expand and populations migrate from rural to urban areas, there is an ever-growing need for a wide range of textile products, encompassing not only clothing and home furnishings but also industrial materials.

Urban lifestyles, characterized by various social occasions and activities, often necessitate a diverse wardrobe to cater to different situations such as work, leisure, and social events. Moreover, the prevailing trend of fast fashion, particularly prominent in urban areas, calls for rapid changes in clothing styles and designs. These factors combined create a strong driving force for the demand of textile chemicals that can deliver diverse, high-quality, and efficiently produced textiles.

Another significant catalyst for the textile chemicals market is the steady rise in disposable income. As people's earnings increase, they naturally tend to allocate more of their budget towards clothing and home furnishing items, ultimately leading to higher consumption of textile products.

Rising disposable income also allows consumers to prioritize quality over price. They are increasingly willing to invest more in products that offer superior comfort, durability, and aesthetic appeal – all of which can be effectively enhanced through the use of textile chemicals.

While urbanization and rising disposable income continue to fuel the demand for textile chemicals, there is also a growing awareness and emphasis on sustainability within the textile industry. Consumers are becoming increasingly mindful of the environmental impact of their choices and are actively seeking out eco-friendly products. Consequently, manufacturers are dedicating their efforts towards adopting sustainable production practices and developing environmentally friendly chemicals.

This emerging trend of sustainability presents both a challenge and an opportunity for the textile chemicals market. While it necessitates the development of innovative and eco-friendly chemicals, it also opens up new avenues for growth and expansion within the sector, driven by consumer demands for sustainable and ethically produced textile products.

## Increasing Demand of Technical Textiles

The demand for technical textiles has been steadily increasing across various industries due to their wide range of applications. In the automotive industry, for example, technical textiles are extensively used for seat upholstery, airbags, seat belts, and interior trim to enhance comfort and safety. Similarly, in the medical sector, technical textiles find applications in surgical sutures, bandages, artificial organs, and protective clothing, playing a crucial role in patient care and safety. Additionally, the construction industry relies on technical textiles for reinforcing buildings, providing insulation, and ensuring durable roofing solutions.

The growing emphasis on safety standards, along with rapid technological advancements, has fueled the demand for technical textiles, consequently driving the textile chemicals market. This market expansion is further propelled by the need for durable and high-performance materials in these sectors. As a result, manufacturers are increasingly investing in research and development activities to produce high-quality, eco-friendly textile chemicals that can meet the stringent specifications of technical textiles.

Moreover, the textile chemical industry is witnessing a shift towards sustainable and green alternatives, driven by environmental concerns and regulatory requirements. This focus on sustainability, coupled with the rising demand for technical textiles, presents a significant growth opportunity for the textile chemicals market. As the demand for technical textiles continues to soar, the textile chemicals market is expected to thrive.

However, the industry also faces challenges, particularly in finding the right balance between performance requirements and environmental considerations. Manufacturers who can successfully develop and offer high-quality, eco-friendly textile chemicals will likely gain a competitive edge in this evolving market. The future of the textile chemicals market lies in continuous innovation, sustainability, and the ability to meet the ever-growing demand for technical textiles.

## Key Market Challenges

### Growth in Chemical Safety and Health Concerns

Over the years, there has been a growing awareness about the potential health risks due to exposure to certain textile chemicals. Some chemicals used in textile production, such as formaldehyde and azo dyes, have been linked to skin irritation, allergies, and more serious health conditions like cancer and respiratory disorders.

Moreover, the textile industry is often associated with water pollution caused by the discharge of untreated effluent. This effluent contains residual chemicals from the production process, including heavy metals and toxic substances. The release of these chemicals into water bodies can harm aquatic life and contaminate drinking water sources, posing a threat to both the environment and human health.

These environmental issues further contribute to the safety and health concerns surrounding the use of textile chemicals. The improper disposal of chemical waste leads to soil contamination and can have long-term effects on ecosystems. Additionally, the carbon footprint associated with the production and transportation of textile chemicals adds to the overall environmental impact.

These safety and health concerns pose a significant challenge to the textile chemicals market. Consumers are becoming more conscious about the products they purchase and use, preferring items that are free from harmful chemicals. This shift in consumer behavior is pressuring manufacturers to reassess the chemicals they use in their production processes and develop more sustainable alternatives.

Furthermore, regulatory bodies worldwide are imposing stricter regulations on the use of certain chemicals in textile production. These regulations aim to reduce the environmental impact and potential health risks associated with these chemicals, but they also necessitate changes in manufacturing practices. Manufacturers are required to implement cleaner production methods, invest in wastewater treatment systems, and adopt eco-friendly technologies to comply with these regulations.

In summary, the awareness of health risks and environmental concerns related to textile chemicals is driving the industry towards more sustainable practices. The adoption of safer chemicals and cleaner production processes is not only necessary to protect human health and the environment but also to meet the changing demands of consumers who seek healthier and more environmentally friendly products.

## Key Market Trends

### Growing Demand for Bio-based and Natural Dyes

Traditionally, synthetic dyes have been widely used in the textile industry due to their vibrant colors, durability, and cost-effectiveness. However, the environmental impact and potential health risks associated with these synthetic dyes are causing a significant shift towards more eco-friendly alternatives.

Bio-based and natural dyes, derived from renewable sources such as plants, fruits, and insects, offer a sustainable solution to the textile industry. These dyes are biodegradable and less harmful to the environment and human health compared to their synthetic counterparts. As a result, they are gaining popularity among both consumers and manufacturers who are increasingly prioritizing sustainability.

Several factors are driving the increased demand for bio-based and natural dyes. Firstly, consumers are becoming more environmentally conscious and are actively seeking products that have a minimal impact on the environment. This preference extends to their clothing choices, leading to a surge in demand for textiles dyed with natural or bio-based dyes. Consumers are also increasingly aware of the potential health risks associated with synthetic dyes, prompting them to opt for safer alternatives.

Secondly, regulatory bodies across the globe are imposing stricter regulations on the use of certain chemicals in textile production. These regulations aim to reduce the environmental impact and potential health risks associated with these chemicals, pushing manufacturers to explore safer and more sustainable alternatives. By adopting bio-based and natural dyes, manufacturers can comply with these regulations while also meeting the growing demand for eco-friendly products.

Finally, advances in technology have played a crucial role in the increased production of bio-based and natural dyes. Innovations in extraction methods and dyeing techniques have made it possible to produce these dyes at a commercial scale, ensuring a steady supply for the textile industry. This availability, along with the increasing awareness and demand for sustainable textiles, has made bio-based and natural dyes a viable and attractive alternative to traditional synthetic dyes.

In conclusion, the textile industry is experiencing a significant shift towards eco-friendly alternatives, with bio-based and natural dyes emerging as a sustainable solution. With their reduced environmental impact, minimal health risks, and growing consumer demand, these dyes are poised to reshape the future of textile dyeing, contributing to a more sustainable and responsible industry.

## Segmental Insights

### Type Insights

The Others segment is projected to experience rapid growth during the forecast period.



Coating and sizing chemicals have emerged as dominant players in the market, capturing a significant revenue share of more than 35.63% in 2022. This dominance can be attributed to the growing demand from various sectors including geotextiles, automotive, outdoor wear, and aerospace applications. These chemicals play a vital role in ensuring the efficient sizing of fabrics during the finishing treatment, which is essential for achieving desired properties and performance.

When it comes to natural pastes, dextrin, wheat starch, corn starch, and gelatin are among the most commonly used. Additionally, water-soluble polymers such as carboxymethyl cellulose, polyvinyl alcohol, acrylates, and modified starch, which are known as textile sizing chemicals or agents, are utilized to protect yarns and enable them to withstand mechanical stress during weaving processes.

In terms of colorants and auxiliaries, they accounted for a revenue share of more than 12% in 2022. Colorants, which can be in the form of dyes or pigments, play a crucial role in imparting vibrant colors to textiles. The dyeing process involves several steps, including singeing, de-sizing, padding, scouring, bleaching, mercerizing, printing, and finishing, all aimed at achieving the desired color and appearance.

This growing market for coating and sizing chemicals, as well as colorants and auxiliaries, reflects the increasing demand for innovative and efficient solutions in the textile industry. Manufacturers and suppliers in this sector are continually striving to meet the evolving needs of customers, driving advancements, and pushing the boundaries of what is possible in fabric production.

### Application Insights

The Apparels segment is projected to experience rapid growth during the forecast period. The growth in the textile industry can be attributed to several factors. Firstly, rising disposable incomes have led to increased consumer spending on apparel and fashion-related products. Additionally, the growing millennial and Gen Z population, who are highly influenced by social media and fashion icons, are driving the demand for trendy clothing. Moreover, the booming e-commerce industry has made it easier for consumers to access a wide range of clothing options, further fueling the growth of the textile sector.

Furthermore, the production of textile raw materials is expected to increase, which will contribute to the overall growth of apparel production. For example, fiber production in India witnessed a significant growth from 1.44 million tons in 2019 to 2.4 million tons in

2020, according to the India Brand Equity Foundation (IBEF). This increase in fiber production indicates a rising demand for textiles, which in turn drives the demand for pretreatment, dyeing, and printing applications in the apparel industry.

## Regional Insights

Asia Pacific emerged as the dominant player in the Global Textile Chemicals Market in 2022, holding the largest market share in terms of value. The remarkable growth of the product market in the Asia Pacific can be attributed to various factors. Firstly, rapid urbanization has created a surge in consumer demand for apparel, resulting in increased production and export. Additionally, the economic resilience demonstrated by countries in the region during the COVID-19 pandemic has further strengthened their position as key apparel exporters.

Lastly, the modernization of textile and chemical manufacturing processes has enabled more efficient production, driving the growth of the industry. According to the World Trade Statistical Review 2021, China, Vietnam, and Bangladesh emerged as the top three apparel exporters in the world in 2020, solidifying the dominance of the Asia Pacific in this market. With these favorable conditions, the Asia Pacific region is expected to experience sustained growth in the apparel sector during the forecast period.

## Key Market Players

Solvay S.A.

OMNOVA Solutions Inc.

German Chemicals Ltd.

Govi N.V.

Resil Chemicals Pvt. Ltd.

LANXESS AG

Dow Inc.

BASF SE



Huntsman International LLC

Evonik Industries AG

Report Scope:

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

Textile Chemicals Market, By Type:

Colorants

Auxiliaries

Others

Textile Chemicals Market, By Application:

Technical Textiles

Home Textiles

Apparels

Others

Textile Chemicals 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 Textile Chemicals Market.

## Available Customizations:

Global Textile 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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