

North America Cooling Water Treatment Chemicals Market Forecast to 2030 - Regional Analysis by Type (Corrosion Inhibitors, Scale Inhibitors, Biocides, and Others) and End-Use Industry (Power; Steel and Mining & Metallurgy; Petrochemicals and Oil & Gas; Food & Beverage; Textile; and Others)

<https://marketpublishers.com/r/N1D1E9C33FD7EN.html>

Date: July 2023

Pages: 130

Price: US\$ 3,000.00 (Single User License)

ID: N1D1E9C33FD7EN

Abstracts

The North America cooling water treatment chemicals market size is expected to grow from US\$ 2.97 billion in 2022 to US\$ 4.72 billion by 2030; it is expected to register a CAGR of 6.1% from 2022 to 2030.

Cooling water treatment chemicals are the chemical agents which helps in removing the unwanted harmful bacteria from the cooling system. It is mainly used for protecting the system from damaging corrosion, control the scale formation & fouling and to control the growth of harmful bacteria. The power, oil & gas, chemicals, petrochemicals, and mining industries produce enormous volumes of wastewater. Generally, these wastewaters are released through a plant outfall into a surface water body, a dissipation lake, or a deep well injected. Environmental concerns due to such releases have catalyzed advancements in zero liquid discharge (ZLD) processes. ZLD is a treatment process in which all wastewater is purged and reused, thereby leaving zero release toward the end of the treatment cycle. This wastewater treatment technique incorporates ultrafiltration, switch assimilation, vanishing/crystallization, and fragmentary electrode ionization. It focuses on the economic reduction of wastewater volumes, along with producing clean water that is suitable for reuse

Based on type, the North America cooling water treatment chemicals market is segmented into scale inhibitor, corrosion inhibitor, biocide, and others. In 2023, the

scale inhibitor segment held the largest share in the North America cooling water treatment chemicals market, and the corrosion inhibitor segment is also expected to be the fastest-growing segment during the forecast period. Scale inhibitors are specially designed to control the deposition of polyvalent metal ions in industrial and wastewater systems. They offer halogen stability and control calcium, iron, manganese, and other metal salts to prevent precipitation on heat transfer surfaces. The selection of a scale control agent depends on the precipitating species and its degree of supersaturation. Polyacrylate, polymethacrylate, polymaleic, phosphonates, sodium phosphates, and sodium aluminates are among the commonly used scale inhibitors in cooling water treatment. Sequestering agents, also chelating agents, used in cooling water treatments are capable of forming soluble complexes with metal ions to control scaling effectively. The stringent regulations by the government on water conservation and wastewater management, coupled with the increased use of cooling water treatment in industrial applications, have fueled the demand for scale inhibitors.

The North America cooling water treatment chemicals market is segmented into the US, Canada, and Mexico. In 2023, the US held the largest share of the North America cooling water treatment chemicals market whereas Canada expected to grow at the highest CAGR over the forecast period. The cooling water treatment chemicals are extensively used in various industries such as the power industry, steel, mining & metallurgy, petrochemicals & oil and gas, food and beverage, textile, and other industries. The growth in these industries is projected to propel the usage and demand for cooling water treatment chemicals in the US. The power generation industry is the backbone of the US economic sectors. Rapid urbanization, increasing population, industrial development, and infrastructure development have raised electricity requirements. The increased demand for electricity and the establishment of new power generation plants along with the expansion and up-gradation of existing power plants is likely to increase the consumption of cooling water treatment chemicals. Furthermore, the rapid growth in the food and beverage industry in the US has led to the increasing installation of cooling water treatment plants. This further boost the growth of the cooling water treatment chemicals market in the US.

Before the emergence of the COVID-19 pandemic, the cooling water treatment chemicals market in North America was mainly driven by factors such as high demand for cooling water treatment chemicals from applications industries such as food and beverage, oil and gas, textile, steel, and power. However, due to the pandemic, there was an unprecedented rise in the number of COVID-19 cases across the US and Canada. In North America, the US has reported the highest number of COVID-19 cases. The cooling water treatment chemicals market in North America also

experienced the results of disrupted supply chains and limited operational efficiencies. In 2020, US crude oil production fell by 8%, recording the largest annual decrease in the US. In the US, crude oil prices decreased in March 2020 because of the sudden drop in the demand for petroleum that resulted from the response to the pandemic.

The market is reviving on account of the government's significant measures, such as vaccination drives. Various industries are also overcoming the challenges of supply chain disruptions of their raw materials. This is expected to provide the impetus for the cooling water treatment chemicals market growth. The US oil production is expected to grow further in 2022.

Accepta, Albemarle Corporation, Buckman, Chemtex Speciality Limited, ChemTreat, Inc., DuBois Chemicals, Ecolab, Veolia Water Technologies, Kemira Oyj, and Kurita Water Industries LTD are among the leading players in the North America cooling water treatment chemicals market. These companies are adopting strategies such as mergers & acquisitions and product launches to expand their geographic presence and consumer bases.

The overall North America cooling water treatment chemicals market size has been derived using both primary and secondary sources. To begin the research process, exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the market. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain more analytical insights. Participants of this process include industry experts such as VPs, business development managers, market intelligence managers, and national sales managers—along with external consultants, including valuation experts, research analysts, and key opinion leaders—specializing in the North America cooling water treatment chemicals market.

Contents

1. INTRODUCTION

- 1.1 Scope of the Study
- 1.2 The Insight Partners Research Report Guidance
- 1.3 Market Segmentation
 - 1.3.1 North America Cooling Water Treatment Chemicals Market – By Type
 - 1.3.2 North America Cooling Water Treatment Chemicals Market – By End-Use Industry
 - 1.3.3 North America Cooling Water Treatment Chemicals Market – By Country

2. KEY TAKEAWAYS

3. RESEARCH METHODOLOGY

- 3.1 Coverage
- 3.2 Secondary Research
- 3.3 Primary Research

4. COOLING WATER TREATMENT CHEMICALS MARKET LANDSCAPE

- 4.1 Market Overview
 - 4.2.1 Bargaining Power of Suppliers
 - 4.2.2 Bargaining Power of Buyers
 - 4.2.3 Threat of New Entrants
 - 4.2.4 Competitive Rivalry
 - 4.2.5 Threat of Substitutes
- 4.3 Ecosystem Analysis
 - 4.3.1 Raw Material Suppliers
 - 4.3.2 Manufacturers
 - 4.3.3 Distributors/Suppliers
 - 4.3.4 End Use Industry
- 4.4 Expert Opinions

5. COOLING WATER TREATMENT CHEMICALS MARKET – KEY MARKET DYNAMICS

- 5.1 Market Drivers

- 5.1.1 Growing Demand from Power Industry
- 5.1.2 Growing Emphasis on Water Recycling and Reuse
- 5.2 Market Restraints
 - 5.2.1 Surging Preference for Chlorine Alternatives
- 5.3 Market Opportunities
 - 5.3.1 Increasing Popularity of Zero Liquid Discharge
- 5.4 Future Trends
 - 5.4.1 Shifting Focus Toward Green Chemicals
- 5.5 Impact Analysis

6. COOLING WATER TREATMENT CHEMICALS – NORTH AMERICA MARKET ANALYSIS

- 6.1 North America Cooling Water Treatment Chemicals Market Overview
- 6.2 Cooling Water Treatment Chemicals Market Forecast and Analysis
- 6.3 Market Positioning – Key Market Players

7. COOLING WATER TREATMENT CHEMICALS MARKET ANALYSIS – BY TYPE

- 7.1 Overview
- 7.2 Cooling Water Treatment Chemicals Market, By Type (2022 and 2030)
- 7.3 Scale Inhibitor
 - 7.3.1 Overview
 - 7.3.2 Scale Inhibitor: Cooling Water Treatment Chemicals Market – Revenue and Forecast to 2030 (US\$ Million)
- 7.4 Corrosion Inhibitor
 - 7.4.1 Overview
 - 7.4.2 Corrosion Inhibitor: Cooling Water Treatment Chemicals Market – Revenue and Forecast to 2030 (US\$ Million)
- 7.5 Biocide
 - 7.5.1 Overview
 - 7.5.2 Biocide: Cooling Water Treatment Chemicals Market – Revenue and Forecast to 2030 (US\$ Million)
- 7.6 Other Type
 - 7.6.1 Overview
 - 7.6.2 Other Type: Cooling Water Treatment Chemicals Market – Revenue and Forecast to 2030 (US\$ Million)

8. COOLING WATER TREATMENT CHEMICALS MARKET ANALYSIS – BY END

USE INDUSTRY

8.1 Overview

8.2 Cooling Water Treatment Chemicals Market, By End Use Industry (2022 and 2030)

8.3 Power

8.3.1 Overview

8.3.2 Power: Cooling Water Treatment Chemicals Market – Revenue and Forecast to 2030 (US\$ Million)

8.4 Steel, Mining, & Metallurgy

8.4.1 Overview

8.4.2 Steel, Mining, & Metallurgy: Cooling Water Treatment Chemicals Market – Revenue and Forecast to 2030 (US\$ Million)

8.5 Petrochemicals, Oil, & Gas

8.5.1 Overview

8.5.2 Petrochemicals, Oil, & Gas: Cooling Water Treatment Chemicals Market – Revenue and Forecast to 2030 (US\$ Million)

8.6 Food & Beverages

8.6.1 Overview

8.6.2 Food & Beverages: Cooling Water Treatment Chemicals Market – Revenue and Forecast to 2030 (US\$ Million)

8.7 Textile

8.7.1 Overview

8.7.2 Textile: Cooling Water Treatment Chemicals Market– Revenue and Forecast to 2030 (US\$ Million)

8.8 Other End Use

8.8.1 Overview

8.8.2 Other End Use: Cooling Water Treatment Chemicals Market– Revenue and Forecast to 2030 (US\$ Million)

9. COOLING WATER TREATMENT CHEMICALS MARKET – GEOGRAPHIC ANALYSIS

9.1 North America: Cooling Water Treatment Chemicals Market

9.1.1 North America: Cooling Water Treatment Chemicals Market –Revenue and Forecast to 2030 (US\$ Million)

9.1.2 North America: Cooling Water Treatment Chemicals Market, by Key Country

9.1.2.1 US: Cooling Water Treatment Chemicals Market –Revenue and Forecast to 2030 (US\$ Million)

9.1.2.1.1 US: Cooling Water Treatment Chemicals Market, by Type

- 9.1.2.1.2 US: Cooling Water Treatment Chemicals Market, by End Use
- 9.1.2.2 Canada: Cooling Water Treatment Chemicals Market –Revenue and Forecast to 2030 (US\$ Million)
- 9.1.2.2.1 Canada: Cooling Water Treatment Chemicals Market, by Type
- 9.1.2.2.2 Canada: Cooling Water Treatment Chemicals Market, by End Use
- 9.1.2.3 Mexico: Cooling Water Treatment Chemicals Market –Revenue and Forecast to 2030 (US\$ Million)
- 9.1.2.3.1 Mexico: Cooling Water Treatment Chemicals Market, by Type
- 9.1.2.3.2 Mexico: Cooling Water Treatment Chemicals Market, by End Use

10. IMPACT OF COVID-19 PANDEMIC ON NORTH AMERICA COOLING WATER TREATMENT CHEMICALS MARKET

- 10.1 North America: Impact Assessment of COVID-19 Pandemic

11. INDUSTRY LANDSCAPE

- 11.1 Strategy and Business Planning
- 11.2 Product News

12. COMPANY PROFILES

- 12.1 Albemarle Corp
 - 12.1.1 Key Facts
 - 12.1.2 Business Description
 - 12.1.3 Products and Services
 - 12.1.4 Financial Overview
 - 12.1.5 SWOT Analysis
 - 12.1.6 Key Developments
- 12.2 Buckman Laboratories International Inc
 - 12.2.1 Key Facts
 - 12.2.2 Business Description
 - 12.2.3 Products and Services
 - 12.2.4 Financial Overview
 - 12.2.5 SWOT Analysis
 - 12.2.6 Key Developments
- 12.3 Chemtex Speciality LTD
 - 12.3.1 Key Facts
 - 12.3.2 Business Description

- 12.3.3 Products and Services
- 12.3.4 Financial Overview
- 12.3.5 SWOT Analysis
- 12.3.6 Key Developments
- 12.4 ChemTreat Inc
 - 12.4.1 Key Facts
 - 12.4.2 Business Description
 - 12.4.3 Products and Services
 - 12.4.4 Financial Overview
 - 12.4.5 SWOT Analysis
 - 12.4.6 Key Developments
- 12.5 DuBois Chemicals Inc
 - 12.5.1 Key Facts
 - 12.5.2 Business Description
 - 12.5.3 Products and Services
 - 12.5.4 Financial Overview
 - 12.5.5 SWOT Analysis
 - 12.5.6 Key Developments
- 12.6 Ecolab Inc
 - 12.6.1 Key Facts
 - 12.6.2 Business Description
 - 12.6.3 Products and Services
 - 12.6.4 Financial Overview
 - 12.6.5 SWOT Analysis
 - 12.6.6 Key Developments
- 12.7 Veolia Water Solutions & Technologies SA
 - 12.7.1 Key Facts
 - 12.7.2 Business Description
 - 12.7.3 Products and Services
 - 12.7.4 Financial Overview
 - 12.7.5 SWOT Analysis
 - 12.7.6 Key Developments
- 12.8 Kemira Oyj
 - 12.8.1 Key Facts
 - 12.8.2 Business Description
 - 12.8.3 Products and Services
 - 12.8.4 Financial Overview
 - 12.8.5 SWOT Analysis
 - 12.8.6 Key Developments

12.9 Kurita Water Industries Ltd

12.9.1 Key Facts

12.9.2 Business Description

12.9.3 Products and Services

12.9.4 Financial Overview

12.9.5 SWOT Analysis

12.9.6 Key Developments

12.10 Accepta Ltd

12.10.1 Key Facts

12.10.2 Business Description

12.10.3 Products and Services

12.10.4 Financial Overview

12.10.5 SWOT Analysis

12.10.6 Key Developments

13. APPENDIX

13.1 About The Insight Partners

13.2 Word Index

List Of Tables

LIST OF TABLES

Table 1. North America Cooling Water Treatment Chemicals Market Revenue Forecast to 2030 (US\$ Mn)

Table 2. North America Cooling Water Treatment Chemicals Market, by Type – Revenue and Forecast to 2030 (US\$ Million)

Table 3. North America Cooling Water Treatment Chemicals Market, by End Use Industry– Revenue and Forecast to 2030 (US\$ Million)

Table 4. US Cooling Water Treatment Chemicals Market, by Type – Revenue and Forecast to 2030 (US\$ Million)

Table 5. US Cooling Water Treatment Chemicals Market, by End Use – Revenue and Forecast to 2030 (US\$ Million)

Table 6. Canada: Cooling Water Treatment Chemicals Market, by Type – Revenue and Forecast to 2030 (US\$ Million)

Table 7. Canada Cooling Water Treatment Chemicals Market, by End Use – Revenue and Forecast to 2030 (US\$ Million)

Table 8. Mexico Cooling Water Treatment Chemicals Market, by Type – Revenue and Forecast to 2030 (US\$ Million)

Table 9. Mexico Cooling Water Treatment Chemicals Market, by End Use – Revenue and Forecast to 2030 (US\$ Million)

Table 10. List of Abbreviation

List Of Figures

LIST OF FIGURES

- Figure 1. Cooling Water Treatment Chemicals Market Segmentation
- Figure 2. Cooling Water Treatment Chemicals Market Segmentation – By Region
- Figure 3. North America Cooling Water Treatment Chemicals Market Overview
- Figure 4. The Power Industry is The Biggest Consumer of Cooling Water Treatment Chemicals
- Figure 5. The US Held Largest Share of Cooling Water Treatment Chemicals Market in 2022
- Figure 6. North America Cooling Water Treatment Chemicals Market, Industry Landscape
- Figure 7. Porter's Five Forces Analysis: Cooling Water Treatment Chemicals Market
- Figure 8. Ecosystem: Cooling Water Treatment Chemicals Market
- Figure 9. Expert Opinion
- Figure 10. Impact Analysis of Drivers and Restraints
- Figure 11. Geographic Overview of Cooling Water Treatment Chemicals Market
- Figure 12. North America Cooling Water Treatment Chemicals Market Forecast and Analysis, 2020–2030 (US\$ Mn)
- Figure 13. Cooling Water Treatment Chemicals Market Revenue Share, By Type (2022 and 2030)
- Figure 14. Scale Inhibitor: Cooling Water Treatment Chemicals Market – Revenue and Forecast To 2030 (US\$ Million)
- Figure 15. Corrosion Inhibitor: Cooling Water Treatment Chemicals Market – Revenue and Forecast To 2030 (US\$ Million)
- Figure 16. Biocide: Cooling Water Treatment Chemicals Market – Revenue and Forecast To 2030 (US\$ Million)
- Figure 17. Other Type: Cooling Water Treatment Chemicals Market – Revenue and Forecast To 2030 (US\$ Million)
- Figure 18. Cooling Water Treatment Chemicals Market Revenue Share, By End Use (2022 and 2030)
- Figure 19. Power: Cooling Water Treatment Chemicals Market – Revenue and Forecast To 2030 (US\$ Million)
- Figure 20. Steel, Mining, & Metallurgy: Cooling Water Treatment Chemicals Market – Revenue and Forecast To 2030 (US\$ Million)
- Figure 21. Petrochemicals, Oil, & Gas: Cooling Water Treatment Chemicals Market – Revenue and Forecast To 2030 (US\$ Million)
- Figure 22. Food & Beverages: Cooling Water Treatment Chemicals Market – Revenue

and Forecast To 2030 (US\$ Million)

Figure 23. Textile: Cooling Water Treatment Chemicals Market– Revenue and Forecast To 2030 (US\$ Million)

Figure 24. Other End Use: Cooling Water Treatment Chemicals Market– Revenue and Forecast To 2030 (US\$ Million)

Figure 25. North America: Cooling Water Treatment Chemicals Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 26. North America: Cooling Water Treatment Chemicals Market Revenue Share, by Key Country (2022 and 2030)

Figure 27. US: Cooling Water Treatment Chemicals Market –Revenue and Forecast to 2030 (US\$ Million)

Figure 28. Canada: Cooling Water Treatment Chemicals Market –Revenue and Forecast to 2030 (US\$ Million)

Figure 29. Mexico: Cooling Water Treatment Chemicals Market –Revenue and Forecast to 2030 (US\$ Million)

Figure 30. Impact of COVID-19 Pandemic on North American Country Markets

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