Chelating Agents - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 120 pages | Mordor Intelligence

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Report description:

The Chelating Agents Market size is estimated at 567.59 Thousand tons in 2024, and is expected to reach 719.59 Thousand tons by 2029, growing at a CAGR of greater than 4% during the forecast period (2024-2029).

The market was negatively impacted by the COVID-19 pandemic in 2020. Due to the COVID-19 outbreak in the first half of 2020, the pulp and paper industry experienced a substantial clog in its growth rate. This, in turn, unfavorably impacted the consumption of chelating agents. Currently, the market has recovered from the pandemic. The market reached pre-pandemic levels in 2022 and is expected to grow steadily in the future.

Increasing demand for chelating agents from household cleaning applications is expected to fuel market growth.

On the flip side, the adverse effects of non-biodegradable chelating agents on the environment are anticipated to restrain the growth of the market over the forecast period.

Further, the growing demand for green chelating agents in several end-user industries is likely to create lucrative growth opportunities for the global market in the future.

The Asia-Pacific region dominated the market around the world, with countries like China, India, and Japan being the biggest consumers.

Chelating Agents Market Trends

Increasing Consumption of Chelating Agents in Cleaning Applications

- Chelating agents are used majorly in cleaning applications. A variety of cleaning formulations are derived using chelating agents owing to their vital role in preventing interference in the cleaning process from the minerals present in hard water.
- Apart from cleaning, the chelating agents demonstrate many other advantages, such as improving the shelf life of the products being cleaned, maintaining color, imparting antimicrobial effects, preventing allergies from nickel or chromium, etc.
- When used in soaps and detergents, the chelating agents facilitate the prevention of metal staining as well as the premature decomposition of bleaching agents. On the other hand, the chelating agents used in making industrial cleaning solutions aid in scale and rust removal by loosening, breaking up, and dissolving insoluble salt deposits on the equipment's surface.
- The growing consciousness for hygiene maintenance in personal and surrounding spaces has stimulated many global detergent manufacturing companies to tap into the surging demand for domestic cleaning formulations.
- For instance, In May 2022, Proctor & Gamble (P&G), the manufacturer of brands like Aerial and Tide, invested INR 2 billion (~ USD 26.52 million) in the construction of a liquid detergent manufacturing plant in Hyderabad.
- According to the Bureau of Labor Statistics, the average annual expenditures for soaps and detergents in the United States amounted to roughly USD 85.37 per consumer unit in 2022, reflecting an increase of 6% compared to the previous year.
- Therefore, considering the factors mentioned above, the demand for chelating agents is expected to rise in the cleaners application segment significantly in the near future.

Asia-Pacific Region to Dominate the Market

- The Asia-Pacific region is expected to account for the largest market for chelating agents market during the forecast period owing to the expanding paper and pulp sector, cleaners, wastewater treatment, agrochemicals, and pharmaceutical industry applications etc. in major countries such as China, India, Japan, etc.
- The Asia-Pacific is witnessing the fastest growth in the demand for both household and industrial detergents. The fast-paced industrialization has made way for the penetration of convenient and easy-to-apply cleaners in these countries.
- Chelating agents find wide usage in the bleaching of pulp and paper, an industry whose growth is being propelled by the rise in e-commerce activities. The paper-based flexible packaging solutions have emerged as durable and environment-friendly alternatives to conventionally used plastic packaging. The popularity of paper-based packaging has fortified the demand fundamentals for chelating agents in the pulp and paper industry.
- China, the world's largest paper manufacturing country, according to the data published by the China Paper Association, the total output of the pulp, paper, and paper products industry reached 283.91 million tons in 2022. This is a slight increase of 1.32 percent from 2021, thus positively impacting the studied market.
- In addition, the wastewater treatment in the Asia-Pacific region has rapid increase with tightening environmental regulations and a growing preference for high-quality and safe water in day-to-day life. Rapidly growing food and beverage, pharmaceutical, chemical, and personal care sectors in China, India, and Japan, with growing population size and strengthening consumer spending power, are spiraling the demand for chelating agents, which will further enhance the growth of the market studied.
- In June 2022, an environmental protection company that focuses on water environment management, named China Everbright Water, secured the expansion and upgrading project of the Zhangdian East Chemical Industry Park Industrial Wastewater Treatment in Zibo City, Shandong Province. This project will be operated on a BOT (Build-Operate-Transfer) model, with a designed daily industrial wastewater treatment capacity of around 5,000 m3.
- All the factors mentioned above are likely to fuel the growth of the Asia-Pacific chelating agents market over the forecast period.

Chelating Agents Industry Overview

The chelating agents market is partially consolidated in nature. The major players (not in any particular order) include Dow, BASF SE, Nouryon, Kemira, and Mitsubishi Chemical Group Corporation, among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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