

## **Europe Polyacrylamide - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

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### **Report description:**

The European polyacrylamide market is estimated to reach USD 283.77 kilotons by the end of this year, and it is projected to reach 349.92 kilotons in the next five years, registering a CAGR of 4.28% during the forecast period.

In Europe, countries like Italy and the United Kingdom were worst hit by the COVID-19 pandemic, which negatively affected the market. Pulp and paper, oil and gas, and mining end-user industries were negatively affected by the pandemic, which decreased the usage of polyacrylamide. However, the market recovered well after the restrictions were lifted. In 2022, the market recovered significantly, owing to the rise in consumption of polyacrylamide in water treatment and oil and gas end-user industries.

#### Key Highlights

- The widening focus on water and wastewater treatment activities in Europe and the rising demand for polyacrylamide from the oil & gas industry is expected to drive the market.
- The strict regulations towards the usage of polyacrylamide owing to its toxicity and the increasing prices of raw materials are hindering market growth.
- The development of bio-based polyacrylamide at competitive prices is expected to create market opportunities during the forecast period.
- Germany is expected to dominate the market due to the rising demand for polyacrylamide from the water treatment, oil, and gas end-user industries. It is also expected to register the highest CAGR during the forecast period.

#### Europe Polyacrylamide Market Trends

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## Water Treatment Segment to Dominate the Market

- Polyacrylamide is used as a flocculant or coagulant for treating municipal and industrial wastewater. It causes suspended particles to aggregate and precipitate when added to treat water.
- Anionic polyacrylamide is used extensively in water treatment and sludge de-watering. For industrial sewage treatment, it is widely used in iron and steel plants, wastewater plants, electroplating wastewater plants, metallurgical wastewater plants, and coal-washing wastewater plants. Due to the significantly high flocculation efficiency, anionic polyacrylamide is widely used in water treatment.
- In Europe, the demand for polyacrylamide is increasing in the United Kingdom and Germany. The increasing water treatment activities, primarily in the northern region of Germany, are boosting the demand for polyacrylamide. The country's water supply and wastewater treatment sectors account for about EUR 22 billion (~USD 23.33 billion) annually, per the Federal Ministry for the Environment and Nature Conservation.
- In United Kingdom, the usage of water treatment technology by municipal corporations for providing clean drinking water is high, and the country follows the standards given by the World Health Organization (WHO). The country has a considerably high level of compliance with the urban waste-water treatment directive. It is reported that almost 100% of the wastewater generated is collected, and about 98.6% of this undergoes secondary treatment, with 92.8% of wastewater undergoing more stringent treatment.
- In Italy, the growing mining and chemical industries are upscaling the demand for wastewater treatment. In August 2022, the European Investment Bank (EIB) offered EUR 50 million (~USD 52.78 million) for improving wastewater treatment in 36 municipalities in the province of Treviso (Veneto, Italy), where Veritas operates integrated water services.
- According to Eurostat, the revenue in water supply, sewerage & waste management is registered at USD 50.84 billion in 2022, and it is expected to reach USD 54.89 billion by 2024, thereby increasing the demand for polyacrylamide in the country.
- Thus, increasing water treatment activities in Germany, the United Kingdom, and Italy are expected to drive the region's polyacrylamide market.

## Germany to Dominate the Europe Market

- Germany is one of the largest markets for polyacrylamide in Europe. Polyacrylamide is used in various end-user industries such as water treatment, oil and gas, pulp and paper, and mining.
- Germany has more than five billion cubic meters of sewage water generated yearly by private households, industry, and trade. Germany has Europe's largest industrial wastewater treatment market, with almost 3,000 treatment plants in around 12,000 discharging companies. Over 920 million cubic meters of industrial wastewater are treated annually in the country before being discharged into the outside environment. Additionally, according to the Federal Ministry, about 99% of the people in Germany have direct access to wastewater treatment plants.
- According to Eurostat, the revenue in water supply, sewerage, and waste management was registered at USD 99.63 billion in 2022, and it is expected to reach USD 112.2 billion by 2024, thereby increasing the demand for polyacrylamide in the country.
- Germany is the largest crude oil consumer and the second-largest natural gas consumer in the European Union. The imports account for about 98% of crude oil and 95% of natural gas consumption in the country. While Germany has minimal domestic oil production equivalent to around 2% of oil consumption, the country has the second-largest refining capacity of 2.1 million b/d of crude oil in the European Union, and it is further expected to increase in the coming years. Thus, the increasing crude oil refining capacity is expected to increase the country's polyacrylamide market.
- Germany is an important mining country within the European region. The major minerals mined in the country are hard coal and lignite. As per the Eurostat data, revenue in the mining and quarrying sector is projected to amount to USD 22.45 billion in 2023, compared to USD 22.07 billion in 2022 and USD 23.05 billion in 2021.

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- Overall, the growth in industries such as water treatment, oil and gas, and mining are likely to drive the country's polyacrylamide market.

## Europe Polyacrylamide Industry Overview

The European polyacrylamide market is consolidated in nature. Some of the key players in the market (not in any particular order) include SNF, BASF SE, Kemira, Solenis, and Solvay.

Additional Benefits:

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

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