

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

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Report description:

The Polyacrylamide Market size is estimated at 2.17 Million tons in 2024, and is expected to reach 2.84 Million tons by 2029, growing at a CAGR of 5.45% during the forecast period (2024-2029).

In 2022, the COVID-19 pandemic, on a global scale, forced water treatment, pulp and paper, oil and gas, and mining industries to shut down their operations, lowering the demand for polyacrylamide. The pandemic impacted almost every aspect of these industries, from product demand to workforce development to accelerating or decelerating trends already underway when it struck. Customers and their temporary production stops reduced production levels, and demand reductions significantly impacted production processes. However, the condition is expected to recover, restoring the growth trajectory of the market during the latter half of the forecast period.

Key Highlights

- In the medium term, the growing utilization in the oil and gas industry for enhanced oil recovery and the increasing need for polyacrylamide as a flocculant in the water treatment industry are expected to drive demand.
- Health concerns caused by exposure to acrylamide monomer is expected to hinder the market's growth.
- The emerging application of polyacrylamide in the biomedical industry and the development of bio-based polyacrylamide are expected to offer lucrative opportunities to the market.
- Asia-Pacific accounted for the highest market share, and the region will likely dominate the market during the forecast period.

Polyacrylamide Market Trends

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Water Treatment Industry to Dominate the Market

- Polyacrylamide is a kind of polymer flocculant that is soluble in water and is produced using acrylamide polymerization. The polymer is deemed ideal for water and wastewater treatment because of its ability to increase viscosity and promote the flocculation of particles. Therefore, this polymer, as a flocculant, can be used for the purification of industrial water, drainage purification, sewage treatment, and wastewater treatment.
- It can also be utilized in the drinking water industry as well, where the presence of sodium in raw water due to colloidal particles makes it unfit for drinking, thereby needing to be dissolved and filtered before usage. Polyacrylamide, in this case, acts as a low molecular weight flocculant and removes the additional sodium from water, making it suitable for drinking purposes.
- The use of polyacrylamide in the water and wastewater industry minimizes the usage of other conventional flocculants for the removal of bacteria, viruses, algae, and other unwanted impurities, resulting in significantly less sludge and making the process more economical and cost-effective.
- The global water consumption rate is increasing by 100% every twenty years. The rising scarcity of potable water, coupled with the growing population and increasing water demand, is the major concern that is driving the demand for the membrane wastewater treatment market across the world. Currently, China and the United States represent the two largest water reclamation and reuse markets across the world.
- 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.
- The United States Environmental Protection Agency (EPA) announced an investment of USD 7.5 billion in September 2023 in available Water Infrastructure Finance and Innovation Act (WIFIA) funding. This innovative low-interest loan program helps communities invest in drinking water, wastewater, and stormwater infrastructure while saving millions of dollars and creating good-paying local jobs. To date, EPA's WIFIA program has announced USD 19 billion to help finance 109 projects across the country.
- The German water treatment technology market is the largest in Europe and is growing considerably. The increasing water treatment activities, primarily in the country's Northern region, are boosting the demand for water treatment chemicals. The country's water supply and wastewater treatment sectors account for about EUR 22 billion (USD 23.33 billion) annually, as per the Federal Ministry for the Environment and Nature Conservation.
- According to the Eurostat and Statistisches Bundesamt, the revenue of Germany's water supply, sewerage, and waste management industry generated USD 99.63 billion in 2022.
- Considering the growth trends and various water treatment projects in different regions worldwide, the water treatment industry is likely to dominate the market, which, in turn, is expected to enhance the demand for polyacrylamide during the forecast period.

Asia-Pacific to Dominate the Market

- The Asia-Pacific region dominated the polyacrylamide market in 2022 with a considerable volume share, and it is expected to maintain its dominance during the forecast period.
- In recent years, China has increased the use of treated water to reduce its dependency on fresh water. With a tough regulatory framework and the increasing importance of water reuse in China's five-year plans (FYPs), the country is rapidly moving toward enhancing its water treatment industry for a sustainable future.
- Suez Group bagged a new contract for a water treatment project in China in September 2023 to contribute to the country's 2060 carbon neutrality ambition. The company, in collaboration with Chongqing Water Group (CWG), is investing around USD 168

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million for the construction and operation of a water treatment plant in Chongqing, China.

- In the oil and gas industry, The Tarim Oilfield, controlled by China National Petroleum Corporation (CNPC), China's largest oil and gas producer, saw its annual oil and gas production reach a record high of 33.1 million tons in 2022. The oilfield is estimated to have generated 7.36 million tons of crude oil and 32.3 billion cubic meters of natural gas in 2022.

- In India, in July 2023, IDE Technologies received a contract from CleanEdge Water Pte Ltd for the construction of a state-of-the-art wastewater treatment plant (WWTP) for mining industry applications. This project is expected to be supplied to the company by IDE Technologies in 2024 and is estimated to treat 4.0 million liters of challenging brine per day.

- The paper demand in India is expected to reach 23.5 metric tons per year by 2025. Some paper mills have existed for several decades, making upgrades and investments into newer machinery necessary. The per capita paper consumption in India, at a little over 13 kg, is way behind the global average of 57 kg. The market for paper and paper products in India is estimated to reach USD 13.4 billion by 2024.

- In the mining industry, state-run Coal India Ltd (CIL) has approved 32 mining projects till January 2022, with an investment of around INR 47,300 crore as the company seeks to replace imports and move toward its 1 billion tons of coal production target by 2023-2034.

- Factors like these are likely to fuel the growth of the polyacrylamide market in Asia-Pacific over the forecast period.

Polyacrylamide Industry Overview

The polyacrylamide market is highly consolidated, with the major players accounting for a major market share. Some of the major players in the market (not in any particular order) include SNF Group, BASF SE, Kemira, Solenis, and Solvay, among others.

Additional Benefits:

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

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