

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

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Report description:

The Polyethyleneimine Market size is estimated at USD 431.28 million in 2024, and is expected to reach USD 473.61 million by 2029, growing at a CAGR of 1.89% during the forecast period (2024-2029).

The impact of COVID-19 on the market was negative. However, the market has reached pre-pandemic levels and is expected to grow steadily during the forecast period.

Key Highlights

- The major factors driving the market are the increasing demand from applications in detergents and water treatment chemicals and the growing usage in adhesives and sealants.
- On the flip side, stringent environmental regulations are hindering the growth of the market.
- Factors such as the development of polyethyleneimine-nano silica composites and the rapidly expanding personal care and cosmetics industry are expected to offer various growth opportunities for the market.
- Asia-Pacific dominates the market worldwide, with the largest consumption coming from China and India.

Polyethyleneimine Market Trends

Adhesives and Sealants Segment to Dominate the Market

- Polyethyleneimine (PEI) is used for a wide range of adhesive and sealant applications. It is used for laminations in the adhesives

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industry as an adhesion promoter. It is also used in water-based primers for packaging films.

- Polyethyleneimine has been used for some time as an extrusion coating primer in the packaging industry. It has particularly found use in bonding polyethylene to paper and other cellulosic substrates. In practice, it is applied with diluted water or water-alcohol solutions.
- The packaging industry is the largest consumer of adhesives globally. This trend is estimated to continue during the forecast period, primarily due to the robust demand for packaging applications in the food and beverage sector.
- Adhesives are one of the most common bonding mechanisms used in the packaging industry. Polyethyleneimine-based adhesives are used majorly in the packaging of frozen food products. This factor boosts the demand for adhesives in the packaging industry, thus driving the market studied.
- According to S&P Global, India's domestic adhesives and sealants market is INR 134-136 billion (~USD 1.81-1.83 billion) in fiscal year 2021. Indian adhesives and sealant market is divided into two segments. The industrial segment caters to B2B industries such as packaging, footwear, paints, automotive, etc. The retail segment caters to industries such as furniture/woodwork, building construction, arts and craft, electrical fittings, etc.
- The electronics industry uses adhesives for various applications, including conformal coatings, protecting terminal electrodes, bonding of surface mount devices, among many others. The electronics industry is one of the fastest-growing industries in India and, as per the Ministry of Electronics and IT, the market size of the industry is INR 4,950-5,000 billion (~ USD 66.95-67.62 billion) as of fiscal 2021.
- Based on the above-mentioned factors, the adhesive and sealants segment is likely to dominate the market during the forecast period.

Asia-Pacific to Dominate the Market

- Asia-Pacific is expected to dominate the market for polyethyleneimine during the forecast period, as polyethyleneimine is strongly used in applications, such as detergents, adhesives, water treatment chemicals, cosmetics, and paper, in the region.
- Polyethyleneimine is used as a wet strengthening agent in pulp and paper manufacturing. The growing paper and pulp industry in China, India, and Southeast Asia may continue to act as a driver for the market studied.
- China is one of the fastest-growing countries in terms of ink production. The country's ink industry is a mix of international ink manufacturers and domestic players, including Hangzhou TOKA Ink, a JV with T&K Toka, and Tianjin Toyo Ink Co. Ltd, a JV with Toyo Ink, which are the leading multi-national ink suppliers in China. DIC, Sakata INX, Siegwerk, Flint Group, Hubergroup, and other major ink companies also have manufacturing plants in China. The Bauhinia Variegata Ink & Chemicals, a subsidiary of Yip's Chemical, is the largest domestic ink producer in the country.
- The detergents and industrial cleaning agents are gaining demand in China due to changing consumer habits and growing attention toward hygiene at home. Due to the COVID-19 pandemic, the Chinese market witnessed a huge rise in demand for detergent and industrial cleaning agents. The sales revenue for detergents and cleaning agents witnessed a ten-fold growth in 2020. In 2021, the sales grew by 400-500%.
- Soap manufacturing is one of the oldest industries operating in the FMCG sector in India, accounting for more than 50% of the consumer goods sector. As per recent data, there are approximately five million retail outlets selling soaps in the country, of which 3.75 million operate in rural areas.
- India and Denmark together launched a whitepaper recently on 'Urban Wastewater Scenario in India' at World Water Congress and Exhibition 2022 in Copenhagen. In 2021 India's sewage generation was 72,368 MLD in urban centres, whereas the installed sewage treatment capacity was only 31,841 MLD. The government is trying to increase the sewage treatment capacity under the government Swachh Bharat Mission 2.0 (SBM 2.0), which was announced last year. This is expected to create a huge demand for polyethyleneimine in water treatment.
- The manufacturers have been investing in the Indian adhesives industry due to its growth potential. Thus, new plants and capacity expansions in the pipeline are projected to increase the demand for polyethyleneimine in the country. For instance, in

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December 2021, Sika announced its plans to open a new technology center and manufacturing plant for high-quality adhesives and sealants in Pune, India.

- Thus, such factors are expected to help the Asia-Pacific region dominate the overall market.

Polyethyleneimine Industry Overview

The polyethyleneimine market is highly consolidated with the presence of international and domestic players. The major companies (in no particular order) include BASF SE, Nippon Shokubai Co. Ltd, Dow, and FUJIFILM Wako Pure Chemical Corporation.

Additional Benefits:

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

Table of Contents:

1 Introduction

1.1 Study Assumptions

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Dynamics

4.1 Drivers

4.1.1 Increasing Demand from Applications in Detergents and Water Treatment Chemicals

4.1.2 Growing Usage in Adhesive and Sealant Applications

4.2 Restraints

4.2.1 Stringent Environment Regulations

4.2.2 Other Restraints

4.3 Industry Value Chain Analysis

4.4 Porter's Five Forces Analysis

4.4.1 Bargaining Power of Suppliers

4.4.2 Bargaining Power of Consumers

4.4.3 Threat of New Entrants

4.4.4 Threat of Substitute Products and Services

4.4.5 Degree of Competition

5 Market Segmentation (Market Size in Revenue)

5.1 Type

5.1.1 Linear

5.1.2 Branched

5.2 Application

5.2.1 Detergents

5.2.2 Adhesives and Sealants

5.2.3 Water Treatment Chemicals

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- 5.2.4 Cosmetics
- 5.2.5 Paper
- 5.2.6 Coatings, Inks, and Dyes
- 5.2.7 Other Applications
- 5.3 Geography
 - 5.3.1 Asia-Pacific
 - 5.3.1.1 China
 - 5.3.1.2 India
 - 5.3.1.3 Japan
 - 5.3.1.4 South Korea
 - 5.3.1.5 Rest of Asia-Pacific
 - 5.3.2 North America
 - 5.3.2.1 United States
 - 5.3.2.2 Canada
 - 5.3.2.3 Mexico
 - 5.3.3 Europe
 - 5.3.3.1 Germany
 - 5.3.3.2 United Kingdom
 - 5.3.3.3 Italy
 - 5.3.3.4 France
 - 5.3.3.5 Rest of Europe
 - 5.3.4 South America
 - 5.3.4.1 Brazil
 - 5.3.4.2 Argentina
 - 5.3.4.3 Rest of South America
 - 5.3.5 Middle-East and Africa
 - 5.3.5.1 Saudi Arabia
 - 5.3.5.2 South Africa
 - 5.3.5.3 Rest of Middle-East and Africa

6 Competitive Landscape

- 6.1 Market Ranking Analysis
- 6.2 Strategies Adopted by Leading Players
- 6.3 Company Profiles
 - 6.3.1 BASF SE
 - 6.3.2 Dow
 - 6.3.3 FUJIFILM Wako Pure Chemical Corporation
 - 6.3.4 Gongbike New Material Technology (Shanghai) Co. Ltd
 - 6.3.5 NIPPON SHOKUBAI Co. Ltd
 - 6.3.6 Polysciences, Inc.
 - 6.3.7 SERVA Electrophoresis GmbH
 - 6.3.8 Shanghai Holdenchem Co.
 - 6.3.9 WUHAN BRIGHT CHEMICAL Co. Ltd

7 Market Opportunities and Future Trends

- 7.1 Development of Polyethyleneimine-nano Silica Composites
- 7.2 Rapidly Expanding Personal Care and Cosmetics Industry

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