

Antiscalants Market by Type, Application (Power & Construction, Oil & Gas, Mining, Municipal Water Treatment & Desalination, Food & Beverage, Chemical & Pharmaceutical, Pulp & Paper), Process Type, & Region - Global Forecast to 2029

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Report description:

The Antiscalants market size is projected to grow from USD 4.5 billion in 2024 to USD 5.9 billion by 2029, registering a CAGR of 5.4% during the forecast period in terms of value. The global antiscalants market is witnessing growth due to its versatile properties and it is also widely used in various industries due to its exceptional properties such as delaying nucleation, distorting crystal structure, reducing the precipitation rate. Furthermore, antiscalants are required for the application in water treatment and desalination, which drives the antiscalants industry.

"Carboxylates/Carbonates are projected to be the second fastest growing type in terms of value."

Carboxylates/Carbonates are projected to be the second fastest growing type in the antiscalants market due to several factors. As Carboxylic scale inhibitors possess good scale control efficiency compared to calcium-based salt scales under extreme temperatures, water hardness, and a varied pH range. Mono or dicarboxylic acids, phosphine carboxylic acid, anhydrides, and acrylic co/terpolymers are carboxylates/carbonate antiscalants used to inhibit scale. They are used in water treatment scaling applications and boiler water hardness treatment. The presence of hypochlorite makes them more stable than other antiscalant types. They hold high thermal stability and vigorous dispersant activity, enabling them to control scale build-up in high-temperature oil fields and mining operations.

"Threshold inhibitors process type is expected to account for the largest market share in 2023 in terms of value."

Threshold inhibitors process type is expected to account for the largest share in 2023 in terms of value. The threshold inhibitors operate on the principle of delaying the crystal formation process by using scale inhibitors in low concentrations, hence finding favor economically. Threshold inhibitors work on the principle of the adsorption mechanism. Scale formation begins with ion

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clusters in the solution that come up with an orientation and finally yield micro-crystallites. Once a new crystal begins growing, it can either grow larger or dissolve into the solution. As the scale starts to form around these tiny crystals, the inhibitors in the threshold also attach themselves to the surface of the crystals, preventing their further growth. This makes the crystal unstable and perform dissolution, while releasing the inhibitor in order to stop another crystal from growing.

"Europe is estimated to be the third-largest market for antiscalants in terms of value for the forecasted period."

Europe holds a significant position as the third-largest region in the global antiscalants market, driven by several factors such as the European market for antiscalants is quite mature, primarily due to the gradual shift of the manufacturing sector to countries with high demand and lower production costs. Despite the economic downturn in Europe, the food & beverage industry in the region registered a slightly higher growth rate than the overall manufacturing industry in the region during the past decade. The requirement for improved water quality for different industrial processes, coupled with stringent regulations regarding the treatment and disposal of polluted water, are the major factors driving this market. Steady population growth and increasing standard of living are driving the medical & pharmaceutical, water & wastewater treatment, and industrial filtration industries in the region.

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, other innovation and technology directors, and executives from various key organizations operating in the antiscalants market, and information was gathered from secondary research to determine and verify the market size of several segments.

- By Company Type: Tier 1 - 40%, Tier 2 - 30%, and Tier 3 - 30%
- By Designation: C Level Executives- 20%, Directors - 10%, and Others - 70%
- By Region: North America - 20%, Europe - 20%, APAC - 40%, South America- 10% , and the Middle East & Africa -10%

The Antiscalants market comprises major players such as Dow (US), BASF SE (Germany), Ecolab (US), Solenis (US), Kemira (Finland), Kurita Water Industries Ltd. (Japan), Syensqo (Belgium), Clariant (Switzerland), Veolia (France), Italmatch Chemicals S.p.A (Italy). The study includes in-depth competitive analysis of these key players in the antiscalants market, with their company profiles, recent developments, and key market strategies.

Research Coverage

This report segments the market for antiscalants market on the basis of type, application, process type, and region, and provides estimations for the overall value of the market across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, products & services, key strategies, new product launches, expansions, and mergers & acquisition associated with the market for antiscalants market.

Key benefits of buying this report

This research report is focused on various levels of analysis - industry analysis (industry trends), market ranking analysis of top players, and company profiles, which together provide an overall view on the competitive landscape; emerging and high-growth segments of the antiscalants market; high-growth regions; and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

- Market Penetration: Comprehensive information on the antiscalants market offered by top players in the global antiscalants market.
- Analysis of drivers: (High growth in application in end use industries, Stringent water treatment regulations) restraints (Volatility in cost of raw materials), opportunities (Increasing use of antiscalants in oil & gas applications, Biodegradability of antiscalants) and challenges (Potential of membrane fouling, a threat to growing market)
- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the antiscalants market.
- Market Development: Comprehensive information about lucrative emerging markets - the report analyzes the markets for

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antiscalants market across regions.

-□Market Capacity: Production capacities of companies producing antiscalants are provided wherever available with upcoming capacities for the antiscalants market.

-□Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the antiscalants market.

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Antiscalants Market by Type, Application (Power & Construction, Oil & Gas, Mining, Municipal Water Treatment & Desalination, Food & Beverage, Chemical & Pharmaceutical, Pulp & Paper), Process Type, & Region - Global Forecast to 2029

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