

## **China Water Treatment Chemicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The China Water Treatment Chemicals Market is expected to register a CAGR of greater than 7% during the forecast period.

COVID-19 positively impacted the market as the large-scale water treatment across cities and municipalities became extremely important to curtail the virus spread.

#### Key Highlights

- Increasing demand from the power industry is a major driving factor for the market studied.
- However, stringent standards for wastewater treatment are restraining the water treatment chemicals demand in the country.
- Some other driving factors of the market include reduced freshwater content from saltwater intrusion and adverse climatic conditions.
- Increasing demand for wastewater treatment from renewable energy solutions (biosolids and biogas) will likely offer a significant growth opportunity for the market studied in the coming years.
- Among the end-user industries, the power industry accounts for a significant market share and is expected to maintain its position during the forecast period.

China Water Treatment Chemicals Market Trends

Corrosion & Scale Inhibitors to Dominate the market

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- Corrosion inhibitors are general-purpose chemicals applied to deal with corrosion caused in boilers. Corrosion occurs due to the oxygen reaction with metallic parts in a boiler to form oxides. Corrosion affects the boiler's metallic part, increasing energy and maintenance costs. They form a thin barrier layer over the boiler's exposed parts from the water.
- Infrastructural growth in China is expected to boost the demand for corrosion inhibitors and help the market to grow. Corrosion inhibitors demand is rapidly growing in the water treatment sector, and industrial manufacturers are the largest customers.
- China is investing USD 1.43 trillion in significant construction projects in the next five years till 2025. According to National Development and Reform Commission (NDRC), the Shanghai plan includes an investment of USD 38.7 billion in the next three years, whereas Guangzhou signed 16 new infrastructure projects with an investment of USD 8.09 billion.
- When untreated water is used in the boiler, it brings several soluble salts. These remain soluble in cold water. However, with the rise in temperature inside the boiler, the salts become insoluble. Carbonates and bicarbonates are formed from calcium and magnesium chemicals dissolved in water. This residue matter gets deposited in the boiler surface, forming a hard coating called scale. The problem with the scales is they block efficient heat transfer, create localized heating, increase power consumption and maintenance expense, and cause occasional boiler failure.
- In China, corrosion & scale inhibitors are used chiefly in power plants and textile, paper, and sugar mills. Recently, there was a consistent growth in water treatment chemicals from these application areas, and the demand is expected to grow during the forecast period.
- In China, 97% of electricity generated requires water for its production. In 2021, China was the leading country in hydroelectricity generation worldwide, with approximately 1,300 TWh generated from hydro sources.
- According to the China Electric Council (CEC), plans are being made to increase the number of new coal power plants by 300-500 by 2030. This growth will likely boost China's power industry's consumption of water treatment chemicals.
- Hence, due to the abovementioned factors, corrosion & scale inhibitors will likely dominate the market during the forecast period.

#### Power Industry to Dominate the Market

- The power industry is one of the biggest consumers of water in China. Water in the electric power generation industry is utilized in many ways, which include steam production for spinning turbines, humidifying air flow into gas turbines, inter-cooling air in gas-turbine plants, plant maintenance, including blow-down, and hydraulic ash disposal, acting as a heat transfer medium in some nuclear plants, and condenser cooling in steam plants.
- The electric power generation industry is one of the critical sources of industrial wastewater. The wastewater from this industry contains significant levels of toxic metal impurities, such as lead, mercury, arsenic, chromium, and cadmium, among others. These impurities can cause significant damage to the environment if not treated properly. Therefore, the electric power generation industry highly utilizes the services of water treatment chemicals.
- In 2022, electricity generation increased by 2.2% from the previous year and reached 8,400 TWh. According to preliminary data from the Chinese Electricity Council, power consumption increased in 2022, reaching 8,637 TWh.
- In 2022, 114.6 TWh of electricity in China was consumed by the primary sector (agriculture), 5,700 TWh by industry, and 1,486 TWh was consumed by the tertiary sector (services).
- China consumes by far the most electricity of any country in the world, with more than 7.8 TWh consumed in 2021. Urban and rural residents' domestic electricity consumption increased by 13.8% compared to the previous year and reached 1,337 TWh in 2022.
- Hence, the power industry will likely dominate the market studied during the forecast period due to the abovementioned factors.

#### China Water Treatment Chemicals Industry Overview

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The China water treatment chemicals market is moderately fragmented, with the presence of both regional and global players. Key players in the market studied include Ecolab, Kemira, Kurita Water Industries Ltd., Solenis, and Suez.

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 Power Industry

4.1.2 Reduced Fresh Water Content from Saline Intrusion and Adverse Climatic Conditions

4.1.3 Other Drivers

4.2 Restraints

4.2.1 Stringent Standards for Wastewater Treatment

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 Value)

5.1 Product Type

5.1.1 Biocides & Disinfectants

5.1.2 Coagulants & Flocculants

5.1.3 Corrosion & Scale Inhibitors

5.1.4 Defoamer and Defoaming Agent

5.1.5 pH Adjuster and Softener

5.1.6 Other Product Types

5.2 Application

5.2.1 Boiling Water Treatment

5.2.2 Cooling Water Treatment

5.2.3 Membrane Treatment

5.2.4 Green Water Treatment

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- 5.2.5 Raw Water/Potable Water Preparation
- 5.2.6 Wastewater Treatment
- 5.3 End-user Industry
  - 5.3.1 Commercial and Institutional
  - 5.3.2 Power Generation
  - 5.3.3 Chemical Manufacturing
  - 5.3.4 Mining & Mineral Processing
  - 5.3.5 Municipal
  - 5.3.6 Other End-user Industries

## 6 COMPETITIVE LANDSCAPE

- 6.1 Mergers and Acquisitions, Joint Ventures, Collaborations, and Agreements
- 6.2 Market Share\*\*/Ranking Analysis
- 6.3 Strategies Adopted by Leading Players
- 6.4 Company Profiles
  - 6.4.1 SNF (China) Flocculant Co., Ltd.
  - 6.4.2 Ecolab
  - 6.4.3 Solenis
  - 6.4.4 Lonza
  - 6.4.5 Suez
  - 6.4.6 Kemira Oyj
  - 6.4.7 Dow
  - 6.4.8 Wujin Fine Chemical Factory
  - 6.4.9 Veolia
  - 6.4.10 Kurita Water Industries Ltd.

## 7 MARKET OPPORTUNITIES AND FUTURE TRENDS

- 7.1 Shifting Focus Towards Green Chemicals

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