

## **Defoamers - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

The Defoamers Market size is estimated at USD 7.19 billion in 2025, and is expected to reach USD 8.84 billion by 2030, at a CAGR of 4.21% during the forecast period (2025-2030).

The COVID-19 epidemic harmed the defoamers sector. Global lockdowns and severe rules enforced by governments resulted in a catastrophic setback as most production hubs were shut down. Nonetheless, the business is recovering from 2021 and is expected to rise significantly in the coming years.

#### Key Highlights

- Over the short term, significant growth in the chemical industry worldwide is one of the key factors driving the studied market growth.
- On the flip side, side effects associated with the products are expected to hinder the defoamers' market growth during the forecast period.
- Nevertheless, the rising demand for eco-friendly defoamers will likely create lucrative growth opportunities for the studied market.
- Asia-Pacific region is expected to dominate the market across the world, with the majority of demand coming from China and India.

#### Defoamers Market Trends

Water and Wastewater Treatment Segment to Drive the Market Growth

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- The defoamers find their applications in industrial and municipal wastewater treatment technologies. The applications of defoamers benefit these processes through increased production capacity, output volume, and reduced operational cost.
- The foam in wastewater treatment systems can result from biological activity, mechanical action, chemical contamination, surfactants in the influent, or some polymer treatments. Thus defoamers reduce the health hazard of foam formation in wastewater treatment plants.
- According to WHO, 70% of the nation's population in China is expected to reside in cities by 2030 due to the increase in the urban population throughout the country. As the urban population increases, they also face an influx of wastewater and sludge. Currently, 80% of sludge in China is improperly dumped, an increasingly controversial environmental issue with urban centers scrambling to decrease pollution by improving their wastewater treatment plants (WWTPs).
- According to the People's Republic of China (PRC's) National Development of Reform and Commission, the country's sludge volume could reach nearly 90 million tons by 2025. Experts estimate that between 2021 and 2025, the country will likely invest about USD 8 billion to construct and install new sludge processing facilities.
- China also announced that it will be constructing 20 million cubic meters/day of additional wastewater treatment capacity over the next five years.
- The water treatment industry in Mexico is expected to register a healthy growth rate. For instance, according to the latest National Inventory made by the National Water Commission (CONAGUA), there are 2786 plants in Mexico with an installed capacity of 196.7 m<sup>3</sup> s<sup>-1</sup> and a treated flow of 144.7 m<sup>3</sup> s<sup>-1</sup>. Ongoing research in the country indicates the government to majorly focus on developing municipal wastewater treatment plants, mostly in the urban areas, which will likely augment the market.
- About 1 million people in Sweden still include private sewage treatment plants despite most homes connected to municipal sewage treatment facilities. Sweden conducts research and development in various areas, including enhanced wastewater purification and source-sorting wastewater systems for effective water resource management.
- For instance, Veidekke secured a contract to construct and install a wastewater treatment plant in Sickla, Stockholm, Sweden, in March 2022. The contract was awarded by Stockholm Vatten och Avfall. It is an execution contract under which the project will be carried out as a collaborative contract. The initial contract value is around USD 153 million. This project is anticipated to be completed in 2027. Therefore, this is expected to create an upside demand for the defoamers market from the water and wastewater treatment segment.
- The factors above are expected to significantly impact the defoamers market during the forecast period.

#### Asia-Pacific to Dominate the Market

- Asia-Pacific accounted for the major market share, owing to the high demand from countries like China and India.
- Due to increased demand for the paints and coatings industry in automobile applications, China is one of the largest consumers of defoamers in the Asia-Pacific region. The country is the largest producer of automobiles and contains the largest market share in the growth of the SUV market. For instance, according to Organisation Internationale des Constructeurs d'Automobiles (OICA), in 2023, automobile production in China amounted to 30,160,966 units, which showed an increase of 12% compared to 2022. Therefore, increasing the production of automobiles is expected to create an upside demand for the defoamers market from the paints and coatings segment.
- Moreover, the country is the largest construction market in the region. The growth in the construction sector is expected to lead to an increase in the demand for paints and coatings and, in turn, is likely to push the growth for defoamers in the country. According to the National Bureau of Statistics of China, in 2023, the construction output value in China peaked at around CNY 31.59 trillion (USD 4.43 trillion).

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- China is the world's second-largest consumer of oil and gas but only the sixth-largest producer of the same. As a big oil consumer, China's oil consumption is increasing yearly with fluctuating growth rates. However, the oil supply still cannot meet the demand, and China mainly relies on imports. For instance, according to Trading Economics, imports of Crude Petroleum (value) in China increased to USD 25.7 thousand in February 2024 from USD 25.6 thousand in January 2024.
- Furthermore, the residential sector in India is on an increasing trend, with government support and initiatives further boosting the demand. For the year 2024-25, Ministry of Housing and Urban Affairs (MoHUA) has received INR 825.76. billion. Of this amount, 36.5 percent is allocated for the provision of houses to the needy population under Pradhan Mantri Awas Yojana (Urban) or PMAY (U).
- Owing to the reasons above, Asia-Pacific will likely witness the highest growth rate during the forecast period.

## Defoamers Industry Overview

The Defoamers Market is moderately consolidated in nature. The major players in this market (not in any particular order) include BASF SE, Croda International Plc, Ashland, Evonik Industries AG, and CLARIANT, among others.

### 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 Expansion and adaptability in the chemical industry
  - 4.1.2 Increasing Paints and Coatings Production
  - 4.1.3 Other Drivers
- 4.2 Restraints
  - 4.2.1 Side Effects Associated with the Products
  - 4.2.2 Raw Material Shortage and Shipping Delays
  - 4.2.3 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 Buyers
  - 4.4.3 Threat of New Entrants
  - 4.4.4 Threat of Substitute Products and Services
  - 4.4.5 Degree of Competition

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

## 5 MARKET SEGMENTATION (Market Size in Value)

### 5.1 Type

- 5.1.1 Oil-based Defoamer
- 5.1.2 Emulsion Defoamer
- 5.1.3 Silicone-based Defoamer
- 5.1.4 Powder Defoamer
- 5.1.5 Polymer-based Defoamers
- 5.1.6 Other Types

### 5.2 End-user Industry

- 5.2.1 Paints and Coatings
- 5.2.2 Oil and Gas
- 5.2.3 Pulp and Paper
- 5.2.4 Food and Beverages
- 5.2.5 Water and Wastewater Treatment
- 5.2.6 Other End-user Industries

### 5.3 Geography

#### 5.3.1 Asia-Pacific

- 5.3.1.1 India
- 5.3.1.2 Japan
- 5.3.1.3 South Korea
- 5.3.1.4 Malaysia
- 5.3.1.5 Thailand
- 5.3.1.6 Indonesia
- 5.3.1.7 Vietnam
- 5.3.1.8 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 Italy
- 5.3.3.6 Spain
- 5.3.3.7 Nordic Countries
- 5.3.3.8 Turkey
- 5.3.3.9 Russia
- 5.3.3.10 Rest of Europe

#### 5.3.4 South America

- 5.3.4.1 Brazil
- 5.3.4.2 Argentina
- 5.3.4.3 Colombia
- 5.3.4.4 Rest of South America

#### 5.3.5 Middle-East and Africa

- 5.3.5.1 Saudi Arabia

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 5.3.5.2 Qatar
- 5.3.5.3 United Arab Emirates
- 5.3.5.4 Nigeria
- 5.3.5.5 Egypt
- 5.3.5.6 South Africa
- 5.3.5.7 Rest of Middle-East and Africa

## 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 Accepta Water Treatment
  - 6.4.2 Air Products Inc.
  - 6.4.3 Aqua-Clear, Inc.
  - 6.4.4 Ashland
  - 6.4.5 BASF SE
  - 6.4.6 BRB International
  - 6.4.7 Buckman
  - 6.4.8 CLARIANT
  - 6.4.9 Croda International Plc
  - 6.4.10 Dow
  - 6.4.11 Eastman Chemical Company
  - 6.4.12 ELEMENTIS PLC
  - 6.4.13 Elkem ASA
  - 6.4.14 Evonik Industries AG
  - 6.4.15 Kemira
  - 6.4.16 SAN NOPCO LIMITED
  - 6.4.17 Solvay
  - 6.4.18 Wacker Chemie AG

## 7 MARKET OPPORTUNITIES AND FUTURE TRENDS

- 8 Rising Demand for Eco-friendly Defoamers
- 9 Expanding Demand for Polymers in a Variety of End-user Industries

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**Defoamers - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts  
(2025 - 2030)**

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-03"/>
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

