

Defoamers Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)

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Report description:

The global defoamers market value reached approximately USD 7.06 Billion in 2024. The market is projected to grow at a CAGR of 4.20% between 2025 and 2034, reaching a value of around USD 10.65 Billion by 2034.

Global Defoamers Market Trends

Nano-structured defoamers enhance efficiency, sustainability, and foam control in industrial applications.

In this market, nano-structured defoamers are a new technology that uses nanoscale particles to improve foam control more effectively, thus propelling the trends in the defoamers market. These defoamers are perfect for use in coatings, agrochemicals, and water treatment since they have better dispersion, longer-lasting performance, and use less chemical.

For instance, the TEGO Foamex series from Evonik uses nanotechnology to create sustainable, highly effective defoaming solutions that minimise environmental impact while preserving ideal foam management in a range of industrial processes. Defoamer compositions are being revolutionised by this technology for increased sustainability and efficacy.

Industry News

October 2019

BASF unveiled a new defoamer called Foamaster WO 2360 that complies with major food contact regulations like the Swiss Ordinance on Food Contact Materials for Packaging, the Code of Federal Regulation (CFR) Title 21, the Food Contact Materials Regulation (EC), and the Bundesinstitut für Risikobewertung (BfR). It also complies with China's food contact regulation GB 9685-2016 for adhesives.

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January 2019

Nouryon (formerly AkzoNobel Specialty Chemicals) has introduced Ethylan TB345, a water-miscible, more sustainable defoamer that will assist industrial and household cleaning formulators in meeting the increasing demand from consumers for cost-effective, environmentally safe products without sacrificing performance.

Historical Market Analysis

Five years back, the global market for defoamers was plagued by environmental issues and regulatory pressures. The key players would have to invest in eco-friendly, bio-based research and development of defoamers that met regulation, thus impeding the defoamers demand. To limit the ecological footprint without affecting performance-critical customer demand for greener products, BASF and Dow introduced low-VOC, water-based formulations and improved manufacturing processes.

Opportunities in the Defoamers Market

The growth of industries in emerging markets presents substantial market opportunities.

- Rising demand for eco-friendly and biodegradable defoamers can drive innovation and create new market segments.
- Advances in nanotechnology and biotechnology offer potential for developing more efficient and sustainable defoamers, broadening their applications and market scope.

Market Dynamics

Defoamers are crucial in sectors such as pharmaceuticals, food and beverages, paints and coatings, and wastewater treatment, ensuring steady defoamers demand growth.

- Ongoing advancements and refinements in defoamer formulations improve their efficiency and environmental safety, offering a competitive advantage, thus boosting the defoamers market dynamics and trends.
- Numerous defoamers adhere to strict regulatory standards, boosting their acceptance and credibility in international markets.

Growth Drivers

Defoamers drive growth in pulp, paper, and water treatment, ensuring efficiency and compliance.

One of the major driving factors of the defoamers market growth is their extensive use in the pulp and paper manufacturing process to control foam during the cooking, bleaching, and washing stages. The growth of the paper and packaging sector, driven by e-commerce and hygiene product demands, fuels the need for defoamers to ensure efficient production processes. Moreover, increasing industrialisation and stricter environmental regulations create a rising demand for effective water treatment solutions.

Defoamers play a critical role in water treatment plants and systems by preventing foam formation during the aeration and purification processes, ensuring optimal operation and compliance with regulatory standards.

Market Restraints

Global economic fluctuations can reduce industrial production and investment, adversely impacting the demand for defoamers.

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- The market is highly competitive, with numerous players leading to price wars and diminished profit margins, leading to defoamers market challenges.
- Stringent and evolving regulations on chemical formulations pose challenges for manufacturers, potentially increasing costs and leading to market exits for non-compliant products.
- Certain defoamers pose environmental risks, prompting stricter regulations and potential restrictions that could limit market opportunities.
- In developing regions, a lack of awareness about the advantages of defoamers can hinder the growth of the market.

Defoamers Industry Segmentation

"Defoamers Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

Market Breakup by Product

- Water-based
- Oil-based
- Silicone-based
- Others

Market Breakup by Application

- Pulp and Paper
- Coatings
- Agrochemicals
- Water Treatment
- Food and Beverages
- Others

Market Breakup by Region

- North America
- Europe
- Asia Pacific
- Latin America
- Middle East and Africa

Defoamers Market Share

By Product Analysis

Water-based defoamers are eco-friendly, oil-based are cost-effective, silicone-based offer high performance, and others focus on sustainability.

With increasing awareness of the environment, biodegradable nature, very low toxicity, and compliance to the highest standards of the environment, water-based defoamers are coming into high demand. These are used exceedingly in water-borne coating and adhesives. As per defoamers market analysis, oil-based defoamers are extremely popular to be used for petrochemical and food processing type industries for the excellent controlling of foam characteristics and affordability. Silicones-based defoamers

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are of very high performance, and especially high temperature and high shear condition; hence, these find applications highly favourable to automotive, coatings, and textiles . Other developments include bio-based and hybrid solutions responding to the growing demands for sustainability.

Market Analysis by Application

Defoamers are gaining traction in pulp, coatings, agrochemicals, water treatment, food, and textiles.

The pulp and paper industry is witnessing growing demand for defoamers to increase efficiency and reduce the foam formed in the production of paper. As per defoamers industry analysis, defoamers are finding added traction in coatings due to regulatory compulsions in the wake of developing eco-friendly products. Agrochemicals require defoamers for the formulations of pesticides and effective crop protection. In water treatment, defoamers are necessary for the handling of foam in wastewater processes. The defoamers in the food and beverages sector ensure smooth processing and final product quality. Others, including textiles and adhesives, embrace sustainable performance-driven solutions in defoaming.

Defoamers Market Regional Insights

North America Defoamers Market Opportunities

The North America defoamers market is experiencing significant growth, driven by increased demand for sustainable solutions across industries like coatings and adhesives. With rising environmental awareness, companies like BASF and Dow are introducing eco-friendly defoamers. Additionally, government initiatives promoting green manufacturing and stricter environmental regulations are boosting market potential. Digital platforms are helping businesses reach eco-conscious consumers, while the development of sustainable infrastructure further enhances investment opportunities, fostering growth in the defoamers sector.

Europe Defoamers Market Dynamics

In Europe, the defoamers market is expanding due to rising consumer demand for sustainable products and stricter regulatory standards. Companies such as Evonik are leading the way with bio-based defoamers to meet eco-certification and sustainability demands. Countries like Sweden and Germany are prioritising green technology and reducing industrial waste , promoting the use of efficient, environmentally friendly defoaming solutions in industries like paints, coatings , and agriculture. Regulatory support for eco-friendly products is driving growth and innovation across the region.

Asia Pacific Defoamers Market Trends

The Asia Pacific defoamers market is poised for significant growth, particularly with governments like India targeting a USD 10 billion defoamers industry by 2025. Key players like Momentive and Wacker Chemie are investing in sustainable defoamers to cater to the growing demand for eco-friendly solutions in industrial applications. Countries such as Japan and Australia are leading investments in sustainable infrastructure, while a survey revealed that 78% of regional travellers prioritise eco-conscious options, further driving market demand.

Latin America Defoamers Market Insights

The Latin American defoamers market is thriving, with Brazil and Costa Rica emerging as key players in eco-tourism and sustainable practices. Companies such as Arkema are focusing on creating bio-based and sustainable defoaming solutions. The Brazilian government promotes the Amazon Rainforest as a key eco-tourism destination, driving the demand for environmentally responsible products. Costa Rica's focus on conservation efforts and eco-friendly tourism experiences has attracted global

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attention, fostering growth in the regional market, especially for sustainable industrial solutions.

Middle East and Africa Defoamers Market Drivers

The Middle East and Africa defoamers market is expanding, driven by growing awareness of environmental sustainability. Countries like South Africa and the United Arab Emirates are investing in eco-friendly tourism and infrastructure, where defoamers are used in industrial and water treatment sectors. Companies like Siltech and Clariant are capitalising on the demand for green defoamers. As more companies adopt sustainable practices and governments push for environmental conservation, there is increasing investment in eco-friendly defoamers for various industrial applications across the region.

Competitive Landscape

Defoamers market players are focusing on gaining profits by developing high-performance solutions with innovative performance characteristics that provide efficiency enhancement, quality product improvement, and also address the environmental needs of customers. Defoamers companies have set their goals to serve this growing demand in various segments, including coatings, adhesives, and construction, and take complete advantage of the shift of markets toward environmentally friendly products with the use of cost-effective formulations yet offering superior application performance and minimal foam. This enables them to strengthen market positions, fuel growth, and capture new opportunities across an increasingly competitive landscape by streamlining their manufacturing processes and getting focused on compliance with regulation.

Bluestar Silicones France SA

Founded in 1998 and based in Lyon, France, currently part of Elkem, Bluestar Silicones is an industrial and coating applications silicone-based defoamers company. Their products are designed to enhance performance, stability, and reduce foam, hence being environmentally friendly and efficient solutions for different industries.

BASF SE

This was based in 1865 in Ludwigshafen, Germany. They manufacture a wide portfolio of defoamers under silicone, non-silicone, and hybrid. Defoamers developed herein help to increase the efficiency in processing, lower surface defects, and also enhance in general performance for coatings as well as adhesives, all produced under absolutely rigorous sustainability specifications.

Dow Corning Corporation

Dow Corning, a subsidiary of The Dow Chemical Company, is based in Midland, Michigan, United States. Its foundation was in 1943. Dow Corning is engaged in the innovation, production, and marketing of silicone-based additives such as defoamers used in coatings, construction, and industrial applications. For this, the company works intensively on effective foam control, improved performance, and sustainability, with maximum energy efficiency optimization and with the lowest possible environmental effect in formulations.

Other players operating in the defoamers market are Nikon Corporation, and Air Products and Chemicals, Inc., among others.

Recent Developments

April 2024

TEGO Foamex 16 and TEGO Foamex 11 are two cutting-edge defoamers that Evonik Coating Additives unveiled at the American

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Coatings Show 2024, which took place at the Indiana Convention Center in Indianapolis from April 30 to May 2. The purpose of these novel additions was to enhance the performance and sustainability of aqueous architectural coatings.

June 2023

Elementis introduced DAPRO BIO 9910, a C14 certified rheology modifier with a 96% bio-based carbon content. With better environmental benefits and greener formulations, it sought to revolutionise the architectural paint industry while improving coating performance and sustainability.

Defoamers Market Report Snapshots

Defoamers Market Size

Defoamers Market Growth

Defoamers Market Analysis

Defoamers Market Share

Defoamers Companies

Table of Contents:

- 1 Executive Summary
 - 1.1 Market Size 2024-2025
 - 1.2 Market Growth 2025(F)-2034(F)
 - 1.3 Key Demand Drivers
 - 1.4 Key Players and Competitive Structure
 - 1.5 Industry Best Practices
 - 1.6 Recent Trends and Developments
 - 1.7 Industry Outlook
- 2 Market Overview and Stakeholder Insights
 - 2.1 Market Trends
 - 2.2 Key Verticals
 - 2.3 Key Regions
 - 2.4 Supplier Power
 - 2.5 Buyer Power
 - 2.6 Key Market Opportunities and Risks
 - 2.7 Key Initiatives by Stakeholders
- 3 Economic Summary
 - 3.1 GDP Outlook
 - 3.2 GDP Per Capita Growth
 - 3.3 Inflation Trends
 - 3.4 Democracy Index
 - 3.5 Gross Public Debt Ratios
 - 3.6 Balance of Payment (BoP) Position

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- 3.7 Population Outlook
- 3.8 Urbanisation Trends
- 4 Country Risk Profiles
 - 4.1 Country Risk
 - 4.2 Business Climate
- 5 Global Defoamers Market Analysis
 - 5.1 Key Industry Highlights
 - 5.2 Global Defoamers Historical Market (2018-2024)
 - 5.3 Global Defoamers Market Forecast (2025-2034)
 - 5.4 Global Defoamers Market by Product
 - 5.4.1 Water-based
 - 5.4.1.1 Historical Trend (2018-2024)
 - 5.4.1.2 Forecast Trend (2025-2034)
 - 5.4.2 Oil-based
 - 5.4.2.1 Historical Trend (2018-2024)
 - 5.4.2.2 Forecast Trend (2025-2034)
 - 5.4.3 Silicone-based
 - 5.4.3.1 Historical Trend (2018-2024)
 - 5.4.3.2 Forecast Trend (2025-2034)
 - 5.4.4 Others
 - 5.5 Global Defoamers Market by Application
 - 5.5.1 Pulp and Paper
 - 5.5.1.1 Historical Trend (2018-2024)
 - 5.5.1.2 Forecast Trend (2025-2034)
 - 5.5.2 Coatings
 - 5.5.2.1 Historical Trend (2018-2024)
 - 5.5.2.2 Forecast Trend (2025-2034)
 - 5.5.3 Agrochemicals
 - 5.5.3.1 Historical Trend (2018-2024)
 - 5.5.3.2 Forecast Trend (2025-2034)
 - 5.5.4 Water Treatment
 - 5.5.4.1 Historical Trend (2018-2024)
 - 5.5.4.2 Forecast Trend (2025-2034)
 - 5.5.5 Food and Beverages
 - 5.5.5.1 Historical Trend (2018-2024)
 - 5.5.5.2 Forecast Trend (2025-2034)
 - 5.5.6 Others
 - 5.6 Global Defoamers Market by Region
 - 5.6.1 North America
 - 5.6.1.1 Historical Trend (2018-2024)
 - 5.6.1.2 Forecast Trend (2025-2034)
 - 5.6.2 Europe
 - 5.6.2.1 Historical Trend (2018-2024)
 - 5.6.2.2 Forecast Trend (2025-2034)
 - 5.6.3 Asia Pacific
 - 5.6.3.1 Historical Trend (2018-2024)
 - 5.6.3.2 Forecast Trend (2025-2034)

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- 5.6.4 Latin America
 - 5.6.4.1 Historical Trend (2018-2024)
 - 5.6.4.2 Forecast Trend (2025-2034)
- 5.6.5 Middle East and Africa
 - 5.6.5.1 Historical Trend (2018-2024)
 - 5.6.5.2 Forecast Trend (2025-2034)
- 6 North America Defoamers Market Analysis
 - 6.1 United States of America
 - 6.1.1 Historical Trend (2018-2024)
 - 6.1.2 Forecast Trend (2025-2034)
 - 6.2 Canada
 - 6.2.1 Historical Trend (2018-2024)
 - 6.2.2 Forecast Trend (2025-2034)
- 7 Europe Defoamers Market Analysis
 - 7.1 United Kingdom
 - 7.1.1 Historical Trend (2018-2024)
 - 7.1.2 Forecast Trend (2025-2034)
 - 7.2 Germany
 - 7.2.1 Historical Trend (2018-2024)
 - 7.2.2 Forecast Trend (2025-2034)
 - 7.3 France
 - 7.3.1 Historical Trend (2018-2024)
 - 7.3.2 Forecast Trend (2025-2034)
 - 7.4 Italy
 - 7.4.1 Historical Trend (2018-2024)
 - 7.4.2 Forecast Trend (2025-2034)
 - 7.5 Others
- 8 Asia Pacific Defoamers Market Analysis
 - 8.1 China
 - 8.1.1 Historical Trend (2018-2024)
 - 8.1.2 Forecast Trend (2025-2034)
 - 8.2 Japan
 - 8.2.1 Historical Trend (2018-2024)
 - 8.2.2 Forecast Trend (2025-2034)
 - 8.3 India
 - 8.3.1 Historical Trend (2018-2024)
 - 8.3.2 Forecast Trend (2025-2034)
 - 8.4 ASEAN
 - 8.4.1 Historical Trend (2018-2024)
 - 8.4.2 Forecast Trend (2025-2034)
 - 8.5 Australia
 - 8.5.1 Historical Trend (2018-2024)
 - 8.5.2 Forecast Trend (2025-2034)
 - 8.6 Others
- 9 Latin America Defoamers Market Analysis
 - 9.1 Brazil
 - 9.1.1 Historical Trend (2018-2024)

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- 9.1.2 Forecast Trend (2025-2034)
- 9.2 Argentina
 - 9.2.1 Historical Trend (2018-2024)
 - 9.2.2 Forecast Trend (2025-2034)
- 9.3 Mexico
 - 9.3.1 Historical Trend (2018-2024)
 - 9.3.2 Forecast Trend (2025-2034)
- 9.4 Others
- 10 Middle East and Africa Defoamers Market Analysis
 - 10.1 Saudi Arabia
 - 10.1.1 Historical Trend (2018-2024)
 - 10.1.2 Forecast Trend (2025-2034)
 - 10.2 United Arab Emirates
 - 10.2.1 Historical Trend (2018-2024)
 - 10.2.2 Forecast Trend (2025-2034)
 - 10.3 Nigeria
 - 10.3.1 Historical Trend (2018-2024)
 - 10.3.2 Forecast Trend (2025-2034)
 - 10.4 South Africa
 - 10.4.1 Historical Trend (2018-2024)
 - 10.4.2 Forecast Trend (2025-2034)
 - 10.5 Others
- 11 Market Dynamics
 - 11.1 SWOT Analysis
 - 11.1.1 Strengths
 - 11.1.2 Weaknesses
 - 11.1.3 Opportunities
 - 11.1.4 Threats
 - 11.2 Porter's Five Forces Analysis
 - 11.2.1 Supplier's Power
 - 11.2.2 Buyer's Power
 - 11.2.3 Threat of New Entrants
 - 11.2.4 Degree of Rivalry
 - 11.2.5 Threat of Substitutes
 - 11.3 Key Indicators for Demand
 - 11.4 Key Indicators for Price
- 12 Value Chain Analysis
- 13 Competitive Landscape
 - 13.1 Supplier Selection
 - 13.2 Key Global Players
 - 13.3 Key Regional Players
 - 13.4 Key Player Strategies
 - 13.5 Company Profiles
 - 13.5.1 Bluestar Silicones France SA
 - 13.5.1.1 Company Overview
 - 13.5.1.2 Product Portfolio
 - 13.5.1.3 Demographic Reach and Achievements

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- 13.5.1.4 Certifications
- 13.5.2 BASF SE
 - 13.5.2.1 Company Overview
 - 13.5.2.2 Product Portfolio
 - 13.5.2.3 Demographic Reach and Achievements
 - 13.5.2.4 Certifications
- 13.5.3 Dow Corning Corporation
 - 13.5.3.1 Company Overview
 - 13.5.3.2 Product Portfolio
 - 13.5.3.3 Demographic Reach and Achievements
 - 13.5.3.4 Certifications
- 13.5.4 Nikon Corporation
 - 13.5.4.1 Company Overview
 - 13.5.4.2 Product Portfolio
 - 13.5.4.3 Demographic Reach and Achievements
 - 13.5.4.4 Certifications
- 13.5.5 Air Products and Chemicals, Inc.
 - 13.5.5.1 Company Overview
 - 13.5.5.2 Product Portfolio
 - 13.5.5.3 Demographic Reach and Achievements
 - 13.5.5.4 Certifications
- 13.5.6 Others

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