

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

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Report description:

Australia Water Treatment Chemicals Market Analysis

The Australia Water Treatment Chemicals Market size is estimated at USD 502.71 million in 2025, and is expected to reach USD 643.74 million by 2030, at a CAGR of 5.07% during the forecast period (2025-2030). The pace reflects nationwide investments in drought-proof infrastructure, stricter discharge permits, and the rapid scaling of lithium-battery metals refining. Utilities are allocating multi-billion-dollar budgets to nutrient removal and PFAS compliance, while mining operators retrofit circuits for closed-loop recycling. Power generators are moving coal-ash facilities to zero-liquid-discharge, creating a steady demand for corrosion inhibitors, antiscalants, and advanced oxidants. Chemical formulators are, however, contending with caustic-soda and hydrochloric-acid price swings that squeeze operating margins.

Australia Water Treatment Chemicals Market Trends and Insights

Tightening Nutrient-Discharge Caps on Municipal WWTP Licences

The National Health and Medical Research Council cut allowable PFOS in potable water to 8 ng/L in 2025, forcing utilities to re-engineer polishing steps and adopt higher-grade coagulants and flocculants. Sydney Water responded by deploying mobile PFAS systems at the Cascade plant, demonstrating the immediate operational adjustments utilities must now make. Lower nutrient thresholds also target algal-bloom hotspots, requiring optimized dosing regimes that balance residual disinfectant demand against formation of by-products. This regulatory squeeze elevates demand for low-aluminum coagulants and

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organophosphate-free corrosion inhibitors compatible with tightened caps. Formulators supplying polyacrylamide and specialty polymers are scaling local capacity to shorten lead times and ensure specification consistency. Utilities that can simultaneously hit lower limits and curb chemical usage are set to win future performance-based contracts.

Accelerating Shift of Coal-Fired Power-Station Ash Dams to Zero-Liquid-Discharge

EPA NSW tightened oversight of legacy coal-ash repositories at Lake Macquarie, prompting power generators to eliminate discharge pathways and recycle all process water. CS Energy highlighted in its 2024 report that ash-dam chemistry now carries board-level risk, linking asset uptime to reliable water treatment. Operators install multi-stage filtration, thickening, and advanced oxidation to concentrate brines for crystallizer feed, a flowsheet that relies on robust antiscalants and high-temperature corrosion inhibitors. The transition raises demand for iron-complexing agents and heavy-metal precipitants to prevent leachate excursions. As older units shut down, chemical procurement shifts from base-load consumption to project-based spikes tied to dam remediation works, altering distributor inventory strategies.

Emerging Electro-Oxidation and UV-AOP as Chemical-Free Alternatives

Bias-enhanced TiO₂ electro-photocatalysis achieved 640% higher PFAS destruction in saline matrices compared with traditional methods, signalling a viable path to reduce chemical footprints. The Water and Carbon Group invested USD 14.5 million to commercialize the LEEF System, evidencing rising private capital interest in high-energy but low-reagent technologies. Municipal pilots target hotspot contaminants where disposables such as powdered activated carbon prove cost-prohibitive. While power costs and electrode life currently limit scale-up, successful integration with onsite renewables could shift future procurement away from oxidizing biocides and defoamers. Chemical suppliers are hedging by adding equipment portfolios or forming service alliances to participate in hybrid treatment trains.

Other drivers and restraints analyzed in the detailed report include:

Rising Desalination Plant Refurbishments and Expansions / Growth of Lithium-Ion Battery Metals Refining Hubs / Restrictions on PFAS-Based Defoamers and Surfactants /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Corrosion and scale inhibitors generated 26.75% of the Australian water treatment chemicals market size in 2024 on the back of aggressive groundwater chemistry and widespread steel infrastructure. Phosphate-based blends remain dominant in potable networks, while phosphonate-polymer hybrids protect high-pressure boiler lines in mining and power assets. Growth persists as desalination projects specify low-zinc antiscalants to meet marine-discharge permits. Biocides and disinfectants posted the quickest trajectory at 5.29% CAGR through 2030, benefiting from amplified pathogen control in recycled-water schemes and stricter residual targets in long pipelines. Innovations include stabilized bromine donors and isothiazolinone blends that function across brackish salinities.

Municipalities diversify chemical risk via multi-supplier contracts, yet rely on a narrow group of ISO-certified vendors for NSF/ANSI 60 compliance. Coagulants and flocculants retain a steady share in sludge-dewatering and tailings filtration. The Australian water treatment chemicals market sees specialty polyacrylamide demand rise as lithium refineries optimize solid-liquid separation in spodumene conversion.

The Australia Water Treatment Chemicals Report is Segmented by Product Type (Biocides and Disinfectants, Coagulants and

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Flocculants, Corrosion and Scale Inhibitors, Defoamers and Defoaming Agents, PH Conditioners/Adjusters, and Other Product Types), End-User Industry (Power Generation, Oil and Gas, Chemical Manufacturing, Mining and Mineral Processing, Municipal, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Accepta Water Treatment / Albemarle Corporation / Aquasol / Buckman / Coogee / De.mem-Capic Pty. Ltd. / Dow / Ecolab / IWTS Group Pty Ltd / IXOM / Kemira / Kurita Water Industries Ltd. / SNF / Solenis / Solvay / Veolia / Waterco / Xylem /

Additional Benefits:

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

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