

**Defoamers Market - Global Industry Size, Share, Trends, Opportunity, & Forecast
Segmented By Product (Water Based Defoamers, Oil Based Defoamers, Silicone
Based Defoamers, Others), By Application (Paints & Coatings, Adhesives & Sealants,
Personal Care & Cosmetics, Agriculture, Food & Beverages, Others), By Region and
Competition, 2020-2030F**

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Report description:

Market Overview

The Global Defoamers Market, valued at USD 3.30 Billion in 2024, is projected to experience a CAGR of 4.96% to reach USD 4.41 Billion by 2030. Defoamers are chemical additives employed to control and eliminate foam in industrial liquid processes, mitigating issues such as reduced efficiency and product defects. The market's expansion is fundamentally driven by the sustained growth of key end-use industries, including pulp and paper, water treatment, paints and coatings, and oil and gas. Increasing industrialization in emerging economies and the rising demand for effective process optimization across various manufacturing sectors further underpin this growth.

Key Market Drivers

The global defoamers market is significantly influenced by the sustained expansion of diverse end-use industries, which inherently generate demand for foam control solutions. As sectors such as pulp and paper, water treatment, paints and coatings, and oil and gas experience growth, the necessity for defoamers to maintain process integrity and product quality escalates. For instance, according to the National Association of Manufacturers (NAM), in its Q1 2024 Manufacturers' Outlook Survey conducted in February 2024, American manufacturers anticipate 2.2% growth in sales over the coming 12 months, indicating a robust environment for industrial chemical suppliers like defoamer manufacturers.

Key Market Challenges

The global defoamers market experiences a significant constraint on its expansion due to volatile raw material prices. Fluctuations

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in the cost of essential chemical feedstocks and energy directly translate into higher manufacturing expenses for defoamer producers. This upward trajectory in production costs erodes profit margins for manufacturers, which in turn limits their capacity for reinvestment in research, development, and scaling up production. According to Cefic, European gas prices in the first half of 2024 were 70% above their 2014-2019 average, underscoring the substantial impact of energy costs on the chemical industry.

Key Market Trends

The increasing shift towards bio-based and sustainable defoamer formulations represents a major trend. This move is largely influenced by growing regulatory pressures and heightened consumer awareness regarding environmental impact. Manufacturers are actively exploring renewable raw materials and greener processes to develop eco-friendly defoamers. For instance, Evonik Coating Additives introduced two new defoamers, TEGO Foamex 16 and TEGO Foamex 11, at the American Coatings Show in April 2024, with TEGO Foamex 16 containing 25 percent bio-based material, aiming to reduce the environmental footprint of coatings and inks. The American Chemistry Council (ACC) emphasized in its May 2024 report, "Sustainability Starts with Chemistry," the critical role of the chemical industry in advancing global sustainability efforts, which includes developing innovative, lower-emissions technologies and alternative feedstocks. This trend is pushing the defoamers market towards solutions that offer both performance and a minimized environmental impact.

Key Market Players

- Kemira Oyj
- Air Products and Chemicals, Inc.
- Ashland Inc.
- Elkem ASA
- The Dow Chemical Company
- Evonik Industries AG
- Wacker Chemie AG
- Shin-Etsu Chemical Co., Ltd.
- BASF SE
- Elementis Plc

Report Scope:

In this report, the Global Defoamers Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

-□ Defoamers Market, By Product:

- o Water based Defoamers
- o Oil Based Defoamers
- o Silicone Based Defoamers
- o Others

-□ Defoamers Market, By Application:

- o Paints & Coatings
- o Adhesives & Sealants
- o Personal Care & Cosmetics
- o Agriculture
- o Food & Beverages
- o Others

-□ Defoamers Market, By Region:

- o North America
 - United States
 - Canada
 - Mexico
- o Europe
 - France

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- United Kingdom
- Italy
- Germany
- Spain
- o Asia Pacific
- China
- India
- Japan
- Australia
- South Korea
- o South America
- Brazil
- Argentina
- Colombia
- o Middle East & Africa
- South Africa
- Saudi Arabia
- UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Defoamers Market.

Available Customizations:

Global Defoamers Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

-□ Detailed analysis and profiling of additional market players (up to five).

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