India Water Treatment Chemicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 80 pages | Mordor Intelligence

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Report description:

India Water Treatment Chemicals Market Analysis

The India Water Treatment Chemicals Market size in 2026 is estimated at USD 3.06 billion, growing from 2025 value of USD 2.86 billion with 2031 projections showing USD 4.27 billion, growing at 6.91% CAGR over 2026-2031. Rapid execution of the Jal Jeevan Mission, expanding Zero-Liquid-Discharge (ZLD) mandates, and the wider push for industrial water recycling are together raising chemical demand from both municipal and industrial users. A surge in rural tap-water connections-already serving 99.3 million households-keeps municipal procurement buoyant. At the same time, textile, pharmaceutical, and power plants are scaling advanced treatment systems that rely on coagulants, antiscalants, and corrosion inhibitors to run at higher efficiency. Supply risk linked to specialty feedstock volatility persists, yet domestic capacity additions and preferential public procurement for local suppliers temper price shocks. Technology differentiation-including enzyme-based chemistries and digital dosing controls-has become the decisive lever for margin expansion as customers prize lifecycle cost reduction and compliance certainty.

India Water Treatment Chemicals Market Trends and Insights

Increasing Demand for Treated Industrial and Municipal Water

Escalating industrial output and tighter effluent norms mean factories are consuming more treatment chemicals per liter of water processed. Thermal power stations rely on high-performance corrosion inhibitors to protect condensate lines running at elevated temperatures, while chemical plants deploy membrane bioreactors that need tailored antiscalants and cleaners. Urban utilities face aging pipelines and rising per-capita demand, prompting heavier chlorination loads plus secondary disinfection to maintain quality across longer distribution loops. Corporate stewardship programs deepen the opportunity: ITC's "water-positive" operations, covering 1.47 million acres of watershed projects, demonstrated sustained uptake of coagulants and pH adjusters across multiple sites. Collectively, these trends ensure the India water treatment chemicals market grows faster than the underlying expansion in water infrastructure capacity.

Government-Led Capex (Jal Jeevan and Namami Gange)

The USD 60.53 billion Jal Jeevan allocation has created 567 live projects that bundle chemical supply into long-term operations packages. Hybrid Annuity bids such as the Chambal-Alwar-Bharatpur scheme embed multiyear dosing contracts, guaranteeing steady drawdown of alum, chlorine, and specialty polymers. Parallel efforts under Namami Gange demand tertiary nutrient removal, spurring sales of coagulants with tighter control over residual phosphorus. Preference clauses that rate domestic suppliers higher in tender scoring afford Indian manufacturers room to enlarge production, shield cash flows, and invest in research and development. Because new plants run 24/7 once commissioned, each allocation unlocks an annuity-like revenue stream that amplifies the long-run expansion of the India water treatment chemicals market.

Environmental and Health Concerns Around Traditional Biocides

Regulators are phasing down chlorine-based disinfectants that form persistent by-products in receiving waters. Draft CPCB guidelines recommend limits on free residual chlorine and encourage biodegradable alternatives, pushing utilities toward peracetic acid or chlorine-dioxide blends. The transition inflates cost per liter treated by 15-20%, presses suppliers to reformulate, and introduces performance uncertainty during changeover. Food and beverage processors, sensitive to product-contact risks, are early adopters of low-residue options, but their stringent quality protocols extend validation cycles and slow switchover decisions. Consequently, despite overall growth, the India water treatment chemicals market loses some upside when operators delay capital upgrades until alternative chemistries prove both compliant and cost-effective.

Other drivers and restraints analyzed in the detailed report include:

Stricter Zero-Liquid-Discharge Mandates for Textiles and PharmaGrowing Industrial Water RecyclingHigh OPEX for Small Utilities and MSME Effluent Plants

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

Segment Analysis

Corrosion and scale inhibitors accounted for a 31.72% India water treatment chemicals market share in 2025, underscoring their role in safeguarding capital-intensive assets exposed to aggressive water chemistries. Thermal power plants dose film-forming amines and phosphate blends to shield mild-steel condensers, while city water boards inject orthophosphates to curb lead leaching in legacy pipelines. Demand visibility is high because once programs are validated, operators rarely switch chemistries mid-cycle. The India water treatment chemicals market size for this segment is projected to expand alongside new coastal desalination plants that face high chloride attack rates and require premium alloy protectants.

Coagulants and flocculants, though starting from a smaller base, are registering a 7.58% CAGR to 2031, the fastest within product categories. Textile units installing clarifier-UF-RO trains prescribe sequential dosing: PAC for turbidity knock-down followed by cationic polyacrylamides to agglomerate micron-scale fines. Municipal sludge-minimization programs are another tailwind, favoring high-charge polyelectrolytes that trim disposal volumes. Over the forecast period, membrane cleaners and specialty antiscalants designed for silica-rich waters emerge as niche yet high-margin sub-segments, reflecting deeper process-specific customization across the India water treatment chemicals market.

The India Water Treatment Chemicals Report is Segmented by Product Type (Biocides and Disinfectants, Coagulants and Flocculants, Corrosion and Scale Inhibitors, Defoamer and Defoaming Agent, and More), End-User Industry (Power, Oil and Gas, Chemical Manufacturing, Mining and Mineral Processing, Municipal, Food and Beverage, Pulp and Paper, and Other End-User Industries). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Accepta Water Treatment Atul Ltd Aquatech Chembond Water Technologies Limited Dow Ecolab Inc. (Nalco Water) IEI Kemira Kurita Water Industries Ltd. Nouryon Pentair SicagenChem SNF Solenis Syensqo Thermax Limited VASU CHEMICALS LLP Veolia

Additional Benefits:

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

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