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Water

Treatment Chemicals: United States

June 2017



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Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	5
Environmental & Regulatory Factors	6
Water Pollution	6
Waterborne Diseases	7
Regulations	7
NAFTA Overview	8
3. Segmentation & Forecasts	10
Products	10
Corrosion & Scale Inhibitors	11
Coagulants & Flocculants	12
Biocides	13
pH Adjusters	13
Other Products	14
Markets	16
Manufacturing	17
Municipal	17
Other Markets	18
4. Industry Structure	20
Industry Characteristics	20
Market Leaders	21
Ecolab	22
General Electric Company	22
Solenis	23
5. About This Report	24
Scope & Method	24
Sources	25
Industry Codes	25
Resources	26

List of Tables & Figures

Figure 1 US Water Treatment Chemical Demand Trends, 2006-2016	4
Table 1 Key Indicators for US Water Treatment Chemical Demand; 2006, 2011, 2016, 2021 (US\$ bil)	5
Figure 2 NAFTA Water Treatment Chemical Demand by Country, 2016	8
Figure 3 US Water Treatment Chemical Demand by Product; 2006, 2011, 2016, 2021 (US\$ mil)	10
Table 2 US Water Treatment Chemical Demand by Product; 2006, 2011, 2016, 2021 (US\$ mil)	10
Figure 4 US Water Treatment Chemical Demand by Product; 2006, 2011, 2016, 2021 (%)	15
Figure 5 US Water Treatment Chemical Demand by Market; 2006, 2011, 2016, 2021 (US\$ mil)	16
Table 3 US Water Treatment Chemical Demand by Market; 2006, 2011, 2016, 2021 (US\$ mil)	16
Figure 6 US Water Treatment Chemical Demand by Market; 2006, 2011, 2016, 2021 (%)	18
Table 4 Major Suppliers to the US Water Treatment Chemical Market by Principal Product Lines	21
Table 5 Industry Codes Related to Water Treatment Chemicals	25

About This Report

Scope & Method

This report forecasts US water treatment chemical demand in US dollars at the manufacturers' level to 2021. Total demand is segmented by product in terms of:

- corrosion and scale inhibitors
- coagulants and flocculants
- biocides
- pH adjusters
- other products such as chelating agents, dewatering aids, and fluoridation chemicals.

In this report, water treatment chemicals are defined as chemicals used to treat water used as supply, process, cooling, or boiler water, or wastewater from municipal and industrial sources. Chemicals used to turn water into a process fluid (eg, fracturing fluids) are excluded from the scope of this report.

Total demand is also segmented by market as follows:

- manufacturing
- municipal
- other markets such as commercial and residential, power generation, and mining markets.

To illustrate historical trends, total demand is provided in an annual series from 2006 to 2016; the various segments are reported at five-year intervals for 2006, 2011, and 2016.

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Water Treatment Chemicals: United States (FF35039) is based on [Global Water Treatment Chemicals Market](#), a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group.

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 5 | Industry Codes Related to Water Treatment Chemicals

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
325181	Alkalies and Chlorine Mfg	2812	Alkalies and Chlorine
325199	All Other Basic Organic Chemical Mfg	2819	Industrial Inorganic Chemicals, NEC
325998	All Other Miscellaneous Chemical Product and Preparation Mfg	2869	Industrial Organic Chemicals, NEC
		2899	Chemicals and Chemical Preparations, NEC

Source: US Census Bureau

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Resources

The Freedonia Group

Global Water Treatment Chemicals Market, June 2017

Freedonia Industry Studies

Drilling Fluids & Chemicals Market in the US, May 2017

Global Air & Fluid Filters Market, January 2017

Biocides Market in the US, December 2016

Wood Preservative Market in the US, November 2016

Activated Carbon, October 2016

Specialty Surfactants, August 2016

Solvents, July 2016

Industrial & Institutional (I&I) Cleaning Chemicals, June 2016

Air & Fluid Filters, April 2016

Corrosion Inhibitors, April 2016

World Activated Carbon, April 2016

World Consumer Water Treatment Systems, January 2016

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Activated Carbon: United States

Air & Fluid Filters: United States

Alkalies & Chlorine: United States

Consumer Water Treatment Systems: United States

Global Water Treatment Chemicals

Manufacturing: United States

Water: United States

World Activated Carbon

World Air & Fluid Filters

World Consumer Water Treatment Systems

Freedonia Custom Research

Trade Publications

Treatment Plant Operator

Water & Wastes Digest

Water & Wastewater Treatment

Water Intelligence Online

Water Online

Water Quality Products

Water Technology

WaterWorld

Agencies & Associations

American Water Works Association

Association of Water Technologies

International Water Association

National Rural Water Association

United States Census Bureau

United States Environmental Protection Agency

United States International Trade Commission

Water Quality Association