

# Water Management Chemicals

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Hundreds of private companies are active in the U.S. water management chemicals industry.

*Water Management Chemicals - Private Companies Report* profiles more than 110 private U.S. producers and distributors of water management chemicals, including biocides, oxidizers, coagulants, flocculants, corrosion inhibitors, pH adjusters and softeners. This information will assist in making decisions concerning acquisitions, joint ventures and cooperative agreements.

Examine the report highlights, sample pages and table of contents on the following pages and see how *Water Management Chemicals - Private Companies Report* can serve as a valuable decision making tool for your company.

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# List of Contents, Tables and Charts

This new report profiles more than 110 private U.S. companies active in the water management chemicals industry. To frame the industry, Freedonia analysts have prepared an overview of the market and general industry. The analysis explores the key indicators that drive demand, highlights company capabilities and annual sales, identifies private company characteristics and shows regional concentration.

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# Companies Profiled

*\* Sample profiles  
on pages 4 and 5*

A&V Incorporated  
A&V Envirotech  
Alchem Incorporated  
Alden Leeds Incorporated  
ALLPURE Waste & Water Treatment Inc.  
Altivia  
Coastal Products and Chemicals  
American Water Chemicals Incorporated  
Amrep Incorporated  
Apyron Technologies Incorporated  
Project Earth Industries  
Scientific Adsorbents Incorporated  
Aqua Laboratories Incorporated  
Aqua Science Incorporated  
Aqua-Serv Engineers Incorporated  
Aqua Smart Incorporated  
Aquaphase Incorporated  
Ash Grove Cement Company  
Associated Chemicals and Services Inc.  
Midland Research Laboratories  
Bay Chemical & Supply Company  
Benzsay & Harrison Incorporated  
Bio-Flocryl Incorporated  
Bond Chemicals Incorporated  
Bond Water Technologies  
Borden & Remington  
Bos Sand Company  
Buckman Laboratories Incorporated  
C&E Services Incorporated  
Carbochem Incorporated  
Carbtrol Corporation  
Cargill Incorporated  
Carus Chemical Company  
Charkit Chemical Corporation  
Chemical Lime Company  
Chemtall Incorporated  
ChemTreat Incorporated  
CITE Corporation

Clack Corporation  
Columbia River Carbonates  
Continental Products of Texas  
Coral Chemical Company  
CSL Water Quality Incorporated  
Davies (DW) & Company Incorporated  
Delta Chemical Corporation  
Dober Chemical Corporation  
Eaglebrook Incorporated  
Ecolochem Incorporated  
Ecological Laboratories Incorporated  
Emkay Chemical Company  
Enerco Corporation  
Environmental Marketing Services Limited  
Envirotrol Incorporated  
Excelsior Coatings Incorporated  
FINI Enterprises Incorporated  
Fe3 Incorporated  
Fluid Dynamics  
Fremont Industries Incorporated  
GAC Chemical Corporation  
General Alum & Chemical Corporation  
Garratt-Callahan Company  
General Carbon Corporation  
Genesee Polymers  
Girvan (John) Company Incorporated  
Graymont Limited  
GenLime Group LP  
Graymont (Qc) Incorporated  
Graymont Western Canada Incorporated  
Graymont Western US Incorporated  
Havelock Lime  
Guardian-IPCO Incorporated  
H-O-H Chemicals Incorporated  
Haviland Enterprises  
HoltraChem Group  
IMR Corporation  
International Chemtex Corporation  
JCI Jones Chemicals Incorporated  
Jones Chemicals  
Jones-Hamilton Company  
Kemiron Incorporated  
Midland Resources Incorporated  
Vigiron Incorporated  
Kenflo Products Incorporated  
Klenzoid Incorporated  
LaRoche Industries Incorporated  
M & P Industries Incorporated  
Madison Chemical Company Incorporated

Mineral-Right Incorporated  
Mississippi Lime Company  
Momar Incorporated  
Mt. Hood Chemical Corporation  
Navy Brand Manufacturing Company  
NCF Manufacturing Company  
Neutron Products Incorporated  
OMYA Incorporated  
Paradigm Labs Incorporated  
Pearl River Polymers Incorporated  
Performance Products Incorporated  
Phoenix Laboratories Incorporated  
PMC Specialties Group Incorporated  
Polychemie Incorporated  
Polydyne Incorporated  
The Power Group Incorporated  
PQ Corporation  
Potters Industries Incorporated  
Pro Products LLC  
PVS Chemicals Incorporated  
Quality Chemical Company  
Ques Industries Incorporated  
Quincy Carbonates Incorporated  
Rochester Midland Corporation  
ROSS Chem Incorporated  
Schneid (I.) Incorporated  
Share Corporation  
SKASOL Incorporated  
Smith (EW) Chemical Company  
State Chemical Manufacturing Company  
Stellar Manufacturing Company  
Summit Research Labs  
Surpass Chemical Company Incorporated  
Terlyn Industries Incorporated  
Textile Rubber & Chemical Company  
Tiarco Chemical  
Technical Specialties Corporation  
Ulrich Chemical Incorporated  
Ultra Additives Incorporated  
Unimin Corporation  
Uniservice Americas Incorporated  
Vinings Industries Incorporated  
Walling Water Management Company  
WATCON Incorporated  
Water Chemical Service Incorporated  
Water Chemicals Incorporated  
Water Chemistry Incorporated  
Water Resources International Incorporated  
Wyo-Ben Incorporated

# Detailed Company Profile

More than 110 private company profiles are compiled and range from detailed to brief company descriptions. (See Samples)

All companies are individually contacted and the majority of the companies verify the data.

Hard to obtain sales and employment figures, key products and services and an overview of corporate operations are provided.

## PRIVATE COMPANY PROFILES

### Davies (DW) & Company Incorporated

3200 Phillips Avenue  
Racine, WI 53403  
County: Racine  
County Code: 55101

Phone: 262-637-6133  
Fax: 262-637-3933  
Web Address: <http://www.davies.com>

Annual Sales:  
Employment:  
Key Executive:

**SAMPLE PROFILE**

Key Water Management Chemical Products: descalers, dispersants, corrosion inhibitors, softeners, algaecides, oxygen scavengers, rust removers, chlorine, chlorine reducers and stabilizers, pH adjusters, algaecides and other chemicals

Related Census Code SIC(s): 2812; 2869; 2899

SIC Description(s): alkalis and chlorine; miscellaneous industrial organic chemicals; miscellaneous chemicals and chemical preparations

DW Davies & Company produces cleaning and maintenance products for industrial, institutional and residential markets. Product lines include industrial chemicals, aerosols, concrete maintenance products, aircraft products, food service products, hand soaps, housekeeping products, institutional products, insecticides, janitorial products, laundry and dry cleaning products, rug cleaners, lubricants, greases, oils, sanitation products, swimming pool chemicals and cleaners, transportation products, water treatment chemicals, and related cleaning and maintenance equipment.

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The Company's oxygen scavengers and rust removers include OXY-OUT, RUST-PURGE and STOP-RUST products. OXY-OUT is designed for large boiler systems or other systems with a large amount of dissolved oxygen. RUST-PURGE dissolves and removes rust through normal backwashing. STOP-RUST #100 is designed to prevent pitting and rusting in boilers. The product can also

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PROFILES

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# Brief Company Profile

These profiles give you insight into the operations of private companies, and can help you:

- Identify companies for investment, merger, and/or acquisition opportunities based on size, products, and location.
- Evaluate the position of your competitors based on sales and/or employment figures.

## PRIVATE COMPANY PROFILES

### **FINI Enterprises Incorporated**

Business Highway 289 North  
Celina, TX 75009  
County: Collin  
County Code: 48085

Phone: 972-382-2381  
Fax: 972-382-3211  
Web Address: <http://www.fini.com>

Annual Sales: **SAMPLE PROFILE**  
Employment:  
Key Executive:

## PRIVATE COMPANY PROFILES

### **Alchem Incorporated**

8135 Red Road  
Rockwell, NC 28138  
County: Rowan  
County Code: 37159

Phone: 704-279-7908  
Fax: 704-279-8418

Annual Sales:  
Employment: **SAMPLE PROFILE**  
Key Executive:

Key Products: aluminum sulfate, aluminum-based flocculants and sulfuric acid for water and wastewater treatment plants

Census Code SIC(s): 2819; 2899

SIC Description(s): miscellaneous industrial inorganic chemicals; miscellaneous chemicals and chemical preparations

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al inorganic chemicals

sulfate for treatment of water and air. ation, lime softening, sludge condition- f oil and grease from water, phosphate metal removal, color removal, dioxin ons. The Company produces liquid subsidiary. Manufacturing of liquid Nicholson, Mississippi; and Klamath

# Market Overview

The Market Overview Section discusses factors influencing supply and demand, including industrial trends and the outlook for water management chemicals.

This information helps you:

- Determine what external factors will impact future supply and demand
- Measure your market and sales potential based on supply and demand forecasts.
- Propose new areas for product development based on market trends & innovations.

## MARKET OVERVIEW

### Industrial

US industrial water management chemicals is projected to increase in 2004. Growth will reflect a generally coupled with rising environmental standards. Stricter enforcement of existing regulations have propagated more industrial water recycling and, thus, a greater need for chemical treatment. Despite this trend, the market may be threatened in the long term by the rise of non-chemical treatment methods such as membrane separation, ozonation and ultraviolet irradiation. Value gains for chemicals will be led primarily by an overall shift away from low-priced commodities toward more expensive specialty water treatments.

The consumption of industrial water management chemicals is somewhat influenced by cycles of manufacturing activity, which can affect the level of water usage. This is the case in water-intensive sectors such as metals, mining and paper production. Generally, higher levels of industrial production promote increased water usage. However, these fluctuations are partially offset by the wide range of water-using industries, the presence of important noncyclical markets such as food and beverages, and across the board increases in water recycling.

### FACTORS AFFECTING NONINDUSTRIAL WATER MANAGEMENT CHEMICALS DEMAND BY MARKET

Market	Factors Stimulating Growth	Factors Inhibiting Growth
Municipal	Stricter regulations for purer drinking water and wastewater, which will increase demand for higher-value specialty products.	More efficient technologies which decrease chemical usage, and competition from membrane separation.
Commercial	Increasing number of commercial and industrial establishments, health care facilities, hotels and motels, consumer spending patterns, and the replacement of chlorine with higher-value specialty products in light commercial applications.	Commercial production market, and competition from non-chemical technologies.

(continued)

# Industry Structure

Gain a better understanding of your competition and analyze your company's position in the industry with information about the characteristics of leading water management chemical manufacturers including total sales, capabilities and regional concentration.

This information helps you:

- Evaluate diversification opportunities based on product lines of other private companies.
- Understand barriers to entry based on industry concentration.
- Develop positioning strategies based on size of competitors.

## INDUSTRY STRUCTURE

### Oxidizers & Biocides

Oxidizers and biocides are manufactured by a number of private companies, many of which also produce other water management chemicals for industrial and nonindustrial applications. Some private firms compete by focusing on chlorine and chlorine derivatives. For example, the \$50 million M... Group is a producer of liquid chlorine for disinfecting potable wastewater streams; and sodium hypochlorite oxidizing potable water. The company also n... hydrochloric acid for corrosion and scale control. million JCI Jones Chemicals' oxidizers include manufac... hypochlorite and repackaged chlorine. In addition, the company produces caustic soda and sodium bisulfite for water treatment and other applications.

Some private companies specialize in oxidizer and biocide chemicals other than chlorine and chlorine derivatives. For example, the \$35 million Carus Chemical's oxidizers are potassium and sodium permanganates, which are used for municipal, commercial, residential and industrial water, as well as air purification applications. The \$5 million Ecological Laboratories' biocides encompass bacteria-based water and soil treatment chemicals for industrial, municipal, agricultural, consumer and other industries.

SAMPLE PAGE

SAMPLE CHART

Selected Private Corrosion Inhibitor Producers Company	Corporate Sales (mil \$)*	Industrial					Nonindustrial			
		Boiler Water	Cooling Water	Process Water	Wastewater	Unspecified	Commercial	Municipal	Residential	Unspecified
American Water Chemicals	>2	•	•		•		•	•		
Amrep	>40	•	•	•	•		•	•		
Aqua-Serv Engineers	5	•	•		•		•	•		
Aqua Smart	10-15									
Aquaphase		•	•	•	•					
Associated Chemicals			•	•	•			•		
Bond Chemicals				•	•		•	•		
Buckman Laboratories				•	•					
ChemTreat			•	•	•					
CITE Corporation	3	•	•	•	•					

\* Sales are 1999 estimates of total corporate sales including products other than corrosion inhibitors.

# *Report Highlights*

- Many private companies in the \$3.4 billion US water management chemical industry offer a wide range of products including corrosion inhibitors, coagulants, flocculants, oxidizers, biocides, pH adjusters, softeners and other chemicals, for both industrial and nonindustrial markets.
- Two private companies have total water management chemical sales of over \$90 million and a third has water management chemicals sales of over \$50 million.
- In addition to water management chemicals, many private firms supply water treatment services such as system design and maintenance, and water testing.
- Some private firms produce water management chemicals as part of a wider range of products for other applications, such as cleaning products or textile chemicals.
- Private water management chemical operations are located throughout the US, with the greatest concentration in California and Texas, followed by Florida, Georgia, Michigan, New York, Ohio and Pennsylvania.
- US demand for water management chemicals is forecast to rise over four percent per annum through 2004 to \$4.2 billion.



# *About The Freedonia Group*

## *Advantages of Freedonia Reports*

The Freedonia Group, Inc. is a leading international industry report/database company.

Since 1985, Freedonia has published over 1,500 titles covering areas such as building materials, chemicals, plastics, industrial components and equipment, household goods, coatings and adhesives, health care, packaging, security, and many other industries.

Private companies reports encompass not only Freedonia's notable industry forecasts, but also market shares, product information and sales and employment figures for **private companies**. Corporate analysts are constantly monitoring privately-held companies to provide the most up-to-date and comprehensive profiles. Freedonia is able to gather and prepare this proprietary information based on our reputation as a leading market research firm.

By obtaining Freedonia's report on private companies in the water management chemical industry, you will be able to:

- **Identify companies for possible investment, merger, and /or acquisition opportunities** based on size, products and location.
- **Measure your market and sales potential** based on demand forecasts.
- **Propose new areas for product development** based on material trends.
- **Develop positioning strategies** based on size and geographic location of competitors.
- **Evaluate diversification opportunities** based on product lines of other private companies.
- **Understand barriers to entry** based on industry concentration and market shares.

# *Our Customers*

Freedonia's clients include major US and international companies in the manufacturing, services, consulting and financial sectors.

Typical purchasers of Freedonia studies :

- **Key Executives**
- **Corporate Planners**
- **Market Researchers**
- **Financial Analysts**
- **Information Centers**
- **New Product Developers**
- **Merger & Acquisition Specialists**

Since 1985 we have provided research to customers ranging in size from global conglomerates to one person consulting firms. More than 90% of the industrial companies in the Fortune 500 use Freedonia research to help with their strategic planning.

Some of Freedonia's customers in the water management chemical industry include: Cargill Incorporated, Textile Rubber and Chemical Company and Ashland Chemical.

Because Freedonia is a source for reliable information, our forecasts have been cited in numerous publications such as *The Financial Times*, *The Wall Street Journal* and *Chemical Week*.

# Related Studies and Reports

*For more information about these or other Freedonia titles, please contact us at:*

**The Freedonia Group, Inc.**

**Phone: (440) 684-9600**

**(800) 927-5900**

**Fax: (440) 646-0484**

## ***Pulp & Paper Chemicals - Private Companies Report***

Six private US companies have worldwide pulp and paper chemical sales of over \$50 million. The largest of these is among the seven leading producers in the US. Private companies also hold significant positions in key segments including calcium carbonate, starch, sodium chemicals and titanium dioxide. This report profiles over 100 private US companies (e.g., Cargill, Grain Processing, JM Huber, Huntsman, Hydrite Chemical, Kronos), evaluates market share, reviews acquisitions and forecasts industry demand.

#1297. . . . . 7/00. . . . . \$3,200

## ***Membrane Separation Technologies***

Demand for membrane materials in the US will advance nearly 8% annually, driven by expanding use in medical and food processing applications. Demand will also benefit from the ongoing development of new uses (e.g., hazardous waste remediation, air pollution control, radioactive wastewater testing and treatment). This study analyzes the \$1.2 billion US membrane separation industry to 2004 and 2009 by type, application and market. It also reviews technology, details market share and profiles key firms.

#1295. . . . . 8/00. . . . . \$3,500

## ***Hazardous Waste Generation & Management***

Expenditures on hazardous waste management in the US will reach \$28 billion in 2004. Chemical and metal wastes will continue to provide the largest market, while hazardous medical and nuclear waste revenues grow much faster. Source reduction will keep waste management volumes and costs down. This study analyzes the generation and management of hazardous wastes in the US to 2004 and 2009 by material, service and geographic region. It also evaluates market share and profiles selected companies.

#1273. . . . . 6/00. . . . . \$3,600

## ***Industrial Water Management Chemicals***

US demand for industrial water management chemicals will grow nearly 5% annually. Stricter pollution controls have prompted more industrial water recycling, and thus a greater need for chemical treatment. Corrosion inhibitors will remain the value leader, with oxidizers and biocides growing the fastest. This study analyzes the \$1.8 billion US industrial water management chemicals industry to 2004 and 2009 by type, application and market. It also evaluates market share and profiles key industry participants.

#1223. . . . . 3/00. . . . . \$3,500

## ***Defoamers***

US demand for defoamers will grow nearly 5% annually as enhanced performance and regulatory criteria prompt the use of higher value products. These include blended defoamers which contain multiple active ingredients such as fatty acids, esters, oils and/or silica in a water base. The pulp and paper industry will remain the largest market. This study analyzes the \$520 million US defoamers industry to 2004 and 2009 by product and market. It also presents market share data and profiles selected industry participants.

#1232. . . . . 2/00. . . . . \$3,400

## ***Pulp & Paper Chemicals***

Dollar growth in US pulp and paper chemical demand will be driven by a shift towards higher-priced specialty products. Volume growth will be impacted by: increasing chemical consumption by papermakers to remain competitive; environmental laws mandating costlier bleaching chemicals; and greater consumption of paper derived from recycled fiber. This study analyzes the US market for pulp and paper chemicals to 2003 and 2008 by product and market. It also evaluates market share and profiles key firms.

#1185. . . . . 12/99. . . . . \$3,600

## ***Disinfectant & Antimicrobial Chemicals***

Gains in US demand for disinfectants and antimicrobials will be driven by products that reduce food-borne illnesses, combat resistant organisms and are compatible with other formulations. The marketing value of antibacterial products and the need for good hygiene will also support growth. This study analyzes the US disinfectant and antimicrobial industry to 2003 and 2008 by type, function and market. It also presents market share and profiles key firms.

#1133. . . . . 7/99. . . . . \$3,400

