World Water Treatment Chemicals

Industry Study with Forecasts for 2017 & 2022

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Demand will be driven in part by rising water quality standards in manufacturing and other industrial applications, and expanding access to safe drinking water in underserved regions.

World demand to rise 5.8% annually through 2017

World demand for water treatment chemicals is forecast to rise 5.8 percent per year to $30.6 billion in 2017. Demand will be driven by rising water quality standards in manufacturing and other industrial applications, expanding access to safe drinking water in underserved regions, and a shift toward higher value chemicals with improved performance and/or environmental profiles, particularly in developed countries. Advances will be the fastest in developing parts of the world -- particularly the Asia/Pacific and Africa/Mideast regions -- due to healthy economic growth and tightening environmental regulations. However, despite the shift in demand toward higher cost products, increases in developed countries will be tempered by greater competition between water treatment chemicals and equipment in some applications, reflecting a more complex industry response to environmental concerns.

Advances to be fastest in developing countries

In countries in developing regions, rising standards for industrial water quality and the adoption of more complex manufacturing processes, along with healthy economic expansion, will drive strong growth in demand for water treatment chemicals. In many developing countries, the use of water treatment chemicals has historically been low relative to use rates seen in manufacturing and industrial markets in more affluent areas, and rising water treatment chemical use rates will be reflective of greater reliance on both commodity-type chemicals and specialty chemicals. The increased use of water treatment chemicals in these regions will be supported by manufacturers’ efforts to remain competitive by improving the quality of finished products, which can be directly impacted by water quality.

Tighter quality controls to boost chemical demand

Growing environmental concerns and increased efforts to modernize municipal water treatment facilities will also support demand for water treatment chemicals in developing areas, as regulations regarding wastewater management and municipal water standards become more stringent. In many developing areas, where wastewater management has historically received less attention than process or supply water treatment, new wastewater quality requirements will promote increased use of water treatment chemicals to remove pollutants before wastewater is discharged to the environment or is reused. Increased investment in municipal water infrastructure in developing countries will also support higher demand for water treatment chemicals, as governments seek to improve access to safe drinking water supplies and sanitation facilities.
Asia/Pacific

Taiwan: Water Treatment Chemical Demand

Demand for water treatment chemicals in Taiwan is expected to rise 5.1 percent per year to US$320 million in 2017. Relative to other countries in the Asia/Pacific region, Taiwan is a fairly well-developed market for water treatment chemicals. In the past two decades, Taiwan’s water treatment infrastructure improved significantly, and growth going forward is expected to occur at a more moderate pace. However, efforts to increase manufacturing and industrial water recycling and to further improve municipal water treatment practices will support continued demand for water treatment chemicals going forward.

The water treatment market in Taiwan is in many respects more comparable to Japan’s or South Korea’s than it is to those in other countries in the Asia/Pacific region. Growth overall will be due more to improvements to, rather than expansion of, its water infrastructure, although growth of Taiwan’s industrial base is generally faster than in Japan. The comparison with Japan and South Korea is also applicable in terms of product mix.

Corrosion and scale inhibitors and coagulants and flocculants are expected to show healthy growth going forward in Taiwan, particularly in the manufacturing market. Corrosion and scale inhibitor demand is expected to rise as users transition to higher-value formulations in order to prevent damage and malfunction in equipment used for water treatment, manufacturing, power generation, and other industrial processes. Coagulants and flocculants are important chemicals in the pretreatment of process water -- particularly in facilities that use membranes -- and in the treatment of wastewater, either for eventual reuse or discharge back into the environment. Demand for these products will be further supported by the increased use of polymer-based coagulants and flocculants, which are more efficient but also more expensive. pH adjusters are also expected to benefit from the continued focus on 220
Changzhou Kewei Fine Chemicals Company Limited
10 Gangqu Nan Road
Riverside Chemical Development Area
Changzhou New District, Jiangsu 213033
China
86-519-8577-7668
http://www.keweichem.com

Annual Sales: $16 million (verified by company, 11/13)
Employment: 300 (verified by company, 11/13)

Key Products: organic phosphonates, phosphonate carboxyates, polycarboxyates, biocides, and algaecides

Changzhou Kewei Fine Chemicals is a privately held manufacturer of water treatment chemicals and intermediates. The Company also produces reverse osmosis (RO) membranes. In addition to selling its products in China, Changzhou Kewei Fine Chemicals exports products to Southeast Asia, North America, and the European Union.

The Company competes in the world water treatment chemical industry via the production of organic phosphonates, phosphonate carboxyates, polycarboxyates, biocides, and algaecides for water treatment end uses. Changzhou Kewei Fine Chemicals’ organic phosphonates include hydroxyethyldiene diphosphonic acid (HEDP), hydroxyethylidene diphosphonic acid tetrasodium salt (NA4HEDP), aminotrimethylene phosphonic acid (AMP), aminotrimethylene phosphonic acid pentasodium salt (sodium ATMP), diethylene triamine pentamethylene phosphonic acid (DETAPMP), ethylenediamine tetramethylene sodium phosphonic acid (EDTMPA), and polybasic alcohol phosphate ester. In general, these compounds can be used as scale and corrosion inhibitors,
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World demand for water treatment equipment is expected to grow 6.9 percent per year to $53.4 billion in 2017. Developing areas will show strong growth based on improved access to treated drinking water and sanitation facilities, particularly through greater use of filtration and membrane systems. This study analyzes the $38.3 billion world water treatment equipment industry, with forecasts for 2017 and 2022 by product, market, world region and major country. The study also evaluates company market share and profiles industry players.

#3103 ............... December 2013 ................. $6100

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World Activated Carbon

World demand for activated carbon is projected to rise 8.1 percent per year to 2.1 million metric tons in 2018, driven by tightening pollution regulations and rising manufacturing activity. North America will remain the largest activated carbon market, while the Asia/Pacific region will slightly outpace and overtake North America by 2023. This study analyzes the global activated carbon industry, with forecasts for 2018 and 2023 by type, application, world region, and for 18 countries. The study also evaluates company market share and profiles industry participants.

#3172 ............... May 2014 ................. $6400

Water Treatment Chemicals

Demand for water treatment chemicals in the US is forecast to advance 3.2 percent annually to $8.7 billion (15.1 billion pounds) in 2017. The energy and mining markets will grow the fastest. Scale control agents will be the fastest growing products, while coagulants and flocculants will pace the larger, more mature categories. This study analyzes the $5.7 billion US water treatment chemical industry, with forecasts for 2017 and 2022 by product, application and market. The study also evaluates company market share and profiles industry competitors.

#3071 ............... September 2013 ................. $4900

World Aquaculture: Feed, Equipment & Chemicals

After several decades of rapid expansion, world demand for aquaculture supplies and equipment is expected to grow 7.4 percent per year to $85.6 billion in 2017 at the farm gate level. The Asia/Pacific region will remain the dominant market, with the key China segment outpaced by other Asian countries. This study analyzes the $44.6 billion world aquaculture supplies and equipment industry, with forecasts for 2017 and 2022 by fish type, product, market, world region and for 17 countries. The study also evaluates company market share and profiles industry participants.

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