

**CLICK TO VIEW**

Table of Contents **2**

List of Tables &  
Charts **3**

Study Overview **4**

Sample Text, Table  
& Chart **5**

Sample Profile, Table &  
Study Coverage **6**

Order Form & Corporate  
Use License **7**

About Freedonia,  
Custom Research,  
Related Studies **8**

# Water Treatment Chemicals

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US Industry Study with Forecasts for **2019 & 2024**

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Study #3322 | July 2015 | \$5300 | 280 pages

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## Table of Contents

### EXECUTIVE SUMMARY

### MARKET ENVIRONMENT

General.....	4
Demographic Trends.....	5
Macroeconomic Outlook.....	8
Manufacturing Outlook.....	12
Pulp & Paper Outlook.....	16
Chemical Outlook.....	19
Metals Outlook.....	22
Food & Beverage Outlook.....	24
Electricity Generation.....	27
Oil & Natural Gas Outlook.....	30
Petroleum Refining Outlook.....	34
Water Use Trends.....	36
Electric Utilities.....	37
Manufacturing & Mining.....	38
Municipal.....	40
Environmental & Regulatory Issues.....	41
Water Pollution.....	42
Waterborne Diseases.....	44
Regulations.....	45
Water Treatment Overview.....	49
Pricing & Product Mix.....	52
Historical Market Trends.....	54
International Activity & Foreign Trade.....	56

### MARKETS

General.....	58
Municipal.....	61
Potable Water.....	64
Wastewater.....	66
Manufacturing.....	68
Pulp & Paper.....	71
Chemical Processing.....	75
Metals.....	79
Food & Beverage Processing.....	82
Pharmaceuticals.....	86
Other Manufacturing Markets.....	89
Energy.....	91
Petroleum Refining.....	93
Oil & Gas.....	94
Other Energy Markets.....	98
Consumer.....	100
Mining & Mineral Processing.....	103
Electric Power Generation.....	106
Commercial & Institutional.....	109
Other Markets.....	112

### APPLICATIONS

General.....	115
Potable Water.....	117
Process Water.....	119
Cooling Water.....	121
Boiler Water.....	123
Other Process Water.....	125
Wastewater.....	127
Other Applications.....	129

### PRODUCTS

General.....	131
Corrosion & Scale Inhibitors.....	134
Molybdates.....	138
Phosphates.....	139
Phosphonates.....	141
Nitrites.....	142
Polymers.....	144
Other Corrosion & Scale Inhibitors.....	146
Biocides.....	148
Chlorine Derivatives.....	152
Chlorine.....	153
Bromine Derivatives.....	155
Other Biocides.....	156
Coagulants & Flocculants.....	158
Metallic Salts.....	162
Polymers.....	163
Other Coagulants & Flocculants.....	165
pH Control Agents.....	167
Bases.....	169
Acids.....	171
Foam Control Agents.....	172
Other Water Treatment Chemicals.....	176
Fluoridation Chemicals.....	177
Chelating Agents.....	179
Oxygen Scavengers.....	181
All Other Water Treatment Chemicals.....	183

### INDUSTRY STRUCTURE

General.....	185
Market Share.....	187
Industry Restructuring.....	191
Competitive Strategies.....	194
Research & Development.....	194
Low Cost Position.....	195
Focus Strategies.....	196
Cooperative Agreements.....	197
Marketing & Distribution.....	199

### COMPANY PROFILES

Akzo Nobel.....	203
Albemarle Corporation.....	205
ALTIVIA Chemicals.....	208
Ashland Incorporated.....	209
Axiall Corporation.....	210
Baker Hughes.....	212
BASF SE.....	214
Berwind Corporation.....	216
Buckman Laboratories International.....	219
Cargill Incorporated.....	221
Chemours Company.....	223
Chemtrade Logistics Income Fund.....	225
Chemtura Corporation.....	227
Danaher Corporation.....	229
Dow Chemical.....	231
DuPont (EI) de Nemours.....	234
Ecolab Incorporated.....	235
Evonik Industries.....	238
FMC Corporation.....	240
General Electric.....	242
GEO Specialty Chemicals.....	246
K+S AG.....	248
Kemira Oyj.....	250
KIK Custom Products.....	253
LANXESS AG.....	256
Lonza Group.....	258
Occidental Petroleum.....	262
Olin Corporation.....	264
Ovivo Incorporated.....	267
PeroxyChem LLC.....	269
SNF SAS.....	271
Solenis LLC.....	273
Tronox Limited.....	275
Veolia Environnement.....	277
Wujin Fine Chemical Factory.....	279

## List of Tables/Charts

### EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

### MARKET ENVIRONMENT

1 Population & Households.....	8
2 Macroeconomic Indicators.....	12

(continued on following page)

## List of Tables/Charts

(continued from previous page)

- 3 Manufacturers' Shipments..... 16
- 4 Paper, Paperboard, & Pulp Production ... 19
- 5 Chemical Product Shipments.....22
- 6 Metals Industry Outlook.....24
- 7 Food & Beverage Shipments.....27
- 8 Electricity Generation.....30
- 9 Oil & Gas Production & Consumption .... 33
- 10 Refined Petroleum Products  
Supply & Demand ..... 35
- 11 Water Use Trends.....37
- 12 Electric Power Generation Water Use.....38
- 13 Manufacturing & Mining Water Use.....40
- 14 Municipal Water Use.....41
- 15 Water Treatment Product Demand ..... 52
- 16 Water Treatment Chemical Pricing ..... 54
- 17 Water Treatment Chemical  
Market, 2004-2014 ..... 56

### MARKETS

- 1 Water Treatment Chemical  
Demand by Market ..... 60
- Cht Water Treatment Chemical  
Demand by Market, 2014..... 61
- 2 Municipal Market for Water  
Treatment Chemicals..... 64
- 3 Municipal Potable Water Market for  
Water Treatment Chemicals ..... 66
- 4 Municipal Wastewater Market for  
Water Treatment Chemicals ..... 68
- 5 Manufacturing Markets for Water  
Treatment Chemicals..... 70
- Cht Manufacturing Markets for Water  
Treatment Chemicals, 2014 ..... 71
- 6 Pulp & Paper Market for Water  
Treatment Chemicals..... 74
- 7 Chemical Processing Market for  
Water Treatment Chemicals ..... 78
- 8 Metals Market for Water  
Treatment Chemicals..... 81
- 9 Food & Beverage Market for  
Water Treatment Chemicals ..... 85
- 10 Pharmaceuticals Market for  
Water Treatment Chemicals ..... 88
- 11 Other Manufacturing Markets for  
Water Treatment Chemicals ..... 90
- 12 Energy Markets for Water  
Treatment Chemicals..... 92
- 13 Petroleum Refining Market for  
Water Treatment Chemicals ..... 94

- 14 Oil & Gas Market for Water  
Treatment Chemicals..... 98
- 15 Other Energy Markets for Water  
Treatment Chemicals..... 100
- 16 Consumer Market for Water  
Treatment Chemicals..... 102
- 17 Mining & Mineral Processing Market  
for Water Treatment Chemicals ..... 105
- 18 Electric Power Generation Market  
for Water Treatment Chemicals ..... 108
- 19 Commercial & Institutional Markets  
for Water Treatment Chemicals ..... 111
- 20 Other Markets for Water  
Treatment Chemicals..... 114

### APPLICATIONS

- 1 Water Treatment Chemical  
Demand by Application ..... 116
- Cht Water Treatment Chemical Demand  
by Application, 2014..... 117
- 2 Potable Water Treatment Chemical  
Demand by Product..... 119
- 3 Process Water Treatment Chemical  
Demand by Application & Product..... 121
- 4 Cooling Water Treatment Chemical  
Demand by Product..... 123
- 5 Boiler Water Treatment Chemical  
Demand by Product..... 125
- 6 Other Process Water Treatment Chemical  
Demand by Product..... 127
- 7 Wastewater Treatment Chemical  
Demand by Product..... 129
- 8 Water Treatment Chemical Demand  
in Other Applications by Product ..... 130

### PRODUCTS

- 1 Water Treatment Chemical  
Demand by Product..... 132
- Cht Water Treatment Chemical Demand:  
Volume & Value, 2014..... 133
- 2 Corrosion & Scale Inhibitor Demand  
in Water Treatment..... 136
- Cht Corrosion & Scale Inhibitor Demand:  
Volume & Value, 2014..... 137
- 3 Molybdate Corrosion & Scale Inhibitor  
Demand in Water Treatment..... 139
- 4 Phosphate Corrosion & Scale Inhibitor  
Demand in Water Treatment..... 141
- 5 Phosphonate Corrosion & Scale Inhibitor  
Demand in Water Treatment..... 142
- 6 Nitrite Corrosion & Scale Inhibitor  
Demand in Water Treatment..... 144

- 7 Polymer Corrosion & Scale Inhibitor  
Demand in Water Treatment..... 145
- 8 Other Corrosion & Scale Inhibitor  
Demand in Water Treatment..... 147
- 9 Biocide Demand in Water Treatment .... 150
- Cht Biocide Demand: Volume  
& Value, 2014..... 151
- 10 Chlorine Derivative Demand  
in Water Treatment..... 153
- 11 Chlorine Demand in Water Treatment .. 154
- 12 Bromine Derivative Demand  
in Water Treatment..... 156
- 13 Other Biocide Demand  
in Water Treatment..... 158
- 14 Coagulant & Flocculant Demand  
in Water Treatment..... 160
- Cht Coagulant & Flocculant Demand:  
Volume & Value, 2014..... 161
- 15 Metallic Salt Coagulant & Flocculant  
Demand in Water Treatment..... 163
- 16 Polymer Coagulant & Flocculant  
Demand in Water Treatment..... 165
- 17 Other Coagulant & Flocculant Demand  
in Water Treatment..... 166
- 18 pH Control Agent Demand  
in Water Treatment..... 168
- 19 Base pH Control Agent Demand  
in Water Treatment..... 170
- 20 Acid pH Control Agent Demand  
in Water Treatment..... 172
- 21 Foam Control Agent Demand  
in Water Treatment..... 175
- 22 Other Water Treatment  
Chemical Demand..... 177
- 23 Fluoridation Chemical Demand  
in Water Treatment..... 179
- 24 Chelating Agent Demand  
in Water Treatment..... 181
- 25 Oxygen Scavenger Demand  
in Water Treatment..... 183
- 26 All Other Water Treatment  
Chemical Demand..... 184

### INDUSTRY STRUCTURE

- 1 US Water Treatment Chemical  
Sales by Company, 2014..... 186
- Cht US Water Treatment Chemical  
Market Share, 2014..... 188
- 2 Selected Acquisitions & Divestitures..... 193
- 3 Selected Cooperative Agreements ..... 199

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*Gains will be supported by growing use of recycled water, which requires more chemical treatment than fresh supply water or wastewater, as well as by growing use of membranes that require chemical pretreatment.*

## US demand to grow 3.2% annually through 2019

Demand for water treatment chemicals in the US is forecast to rise 3.2 percent per year to \$7.5 billion in 2019, with volume reaching 15.5 billion pounds. Gains will be supported by increasing water recycling and reuse, processes which typically require more aggressive chemical treatment than fresh supply water or wastewater for disposal. Greater reliance on membranes and other water treatment equipment types that work best when the water has been pretreated with chemicals will further support demand. Additionally, rising water quality standards and environmental concerns will prompt the use of more expensive specialty chemicals that can be used in lower doses and are less hazardous.

## Increasing water recycling & reuse to benefit water treatment chemicals

Rising water costs and increasing regional water scarcity will promote greater emphasis on water recycling and reuse, leading in turn to rising water treatment chemical demand for the treatment of recycled water, and water being recirculated through closed-loop systems. This trend will be particularly felt in markets that use significant amounts of water, such as oil and gas, pulp and paper production, and electric power generation.

## US Water Treatment Chemical Demand, 2019 (\$7.5 billion)



## Rising use of water treatment equipment to also benefit chemicals

The rising use of water treatment equipment has also impacted the market for water treatment chemicals. While biocide demand will be limited by the increased use of disinfection systems, demand for other chemicals such as corrosion and scale inhibitors, foam control agents, and coagulants and flocculants will be supported by the expanding use of equipment such as membrane systems that require pretreatment of the water with chemicals in order to maintain efficiency and prevent damage.

## Biocide demand to be restrained by regulations

Gains in biocide demand will continue to be slower than gains in other product categories. In addition to the impact of the rising use of disinfection equipment, growth will also be restrained by changing regulations and public opinion of disinfectants. In the municipal market, disinfection byproduct regulations have led to a decline in biocide use, although some biocides will continue to be necessary to meet residual disinfection requirements. In other markets, increasing standards for process water will also serve to restrain biocide demand, as biocides may be considered contaminants.

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## Sample Text, Table & Chart

### MARKETS

#### Energy

Demand for water treatment chemicals in the energy market is forecast to grow to \$1.5 billion in 2019, up from \$1.2 billion in 2014. In terms, demand is expected to grow annually, exceeding 5 percent. The oil and gas sector is a key market, where high prices will lead to high demand for water treatment chemicals. Growth in demand for water treatment chemicals is also being driven by increased water treatment in the power generation market. Smaller segments of the energy market such as natural gas processing and biofuels are expected to show faster growth than the overall average for water treatment chemicals through 2019.

SAMPLE  
TEXT

While most major types of water treatment chemicals are used in the energy market, coagulants and flocculants and corrosion inhibitors comprise the bulk of demand; together, these products are expected to account for 85 percent of demand in dollar terms in 2014. pH control agents also comprise a substantial share of demand in volume terms, although these markets remain dependent on commodity acids and bases and the very low average prices for these products gives them a relatively small share in dollar terms. Foam control products are expected to show the fastest growth through 2019, as users attempt to prevent damage and improve the function of equipment used in oil and gas and the other energy markets.

Suppliers of water treatment chemicals to the energy markets include companies that are primarily water-focused businesses and companies that are centered on the oil and gas and refining markets. Suppliers include Baker Hughes (a major supplier of refinery chemical additives), Berwind, General Chemical Performance Products, Electric, Kemira, and Lonza.

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TABLE V-9

BIOCIDE DEMAND IN WATER TREATMENT  
(million dollars)

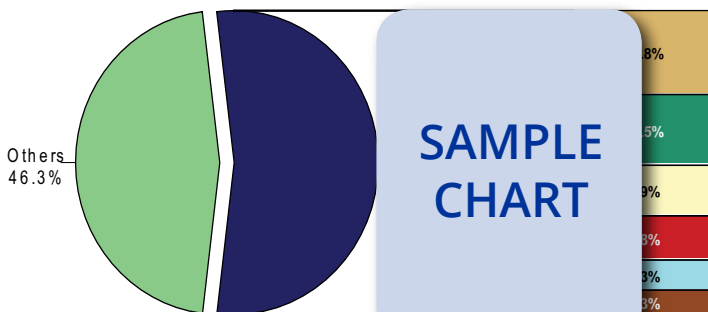
Item	2004	2009	2014	2019	2024
Water Use (tril gal)					
lb chemicals/mil gal water					
Biocide Demand (mil lb)					
\$/lb					
Biocide Demand					
By Product:					
Chlorine Derivatives					
Chlorine					
Bromine Derivatives					
Other Biocides					
By Application:					
Potable Water					
Process Water					
Wastewater					
Other Applications					
% biocides					
Water Treatment Chemical Demand	5,400	6,200	6,100	7,000	6,700

SAMPLE  
TABLE

Source: The Freedonia Group, Inc.

CHART VI-1

US WATER TREATMENT CHEMICAL MARKET SHARE, 2014  
(\$6.4 billion)



SAMPLE  
CHART

## Sample Profile & Table, & Study Coverage

**TABLE IV-4**  
**COOLING WATER TREATMENT CHEMICAL DEMAND BY PRODUCT**  
 (million dollars)

Item	2004	2009	2014	2019	2024
Process Water Treatment Chemical Demand % cooling					
Cooling Water Treatment Chemicals					
Corrosion & Scale Inhibitors					
Biocides					
Coagulants & Flocculants					
pH Control Agents					
Foam Control Agents					
Other Water Treatment Chemicals					
\$/lb					
Cooling Water Treatment Chemicals (mil lb)					

Source: The Freedonia Group, Inc.

SAMPLE TABLE

### COMPANY PROFILES

#### Buckman Laboratories International Incorporated

1256 North McLean Boulevard  
 Memphis, TN 38108  
 901-278-0220  
<http://www.buckman.com>

SAMPLE PROFILE

Annual Sales  
 Employment  
 Key Products  
 polymer  
 floccular  
 scavenger

inhibitors, cationic  
 dispersants, coagulants,  
 defoamers, oxygen

Buckman Laboratories International is a privately held manufacturer of specialty chemicals used in the pulp and paper, water treatment, and leather processing industries. The Company is owned by Bulab Holdings Incorporated (Memphis, Tennessee).

The Company participates in the US water treatment chemical industry through the production of specialty chemicals intended for use in reverse osmosis, cooling water, boiler water, and wastewater treatment applications; and water recovery and reuse processes. These chemicals are employed in the recreational water, municipal water treatment, power generation, textile, hydrocarbon and chemical processing, fertilizer, leather, food and beverage, metal smelting, mining, mineral processing, oil and gas extraction, pharmaceutical, pulp and paper, refining, and sugar/ethanol markets. For example, products for the recreational water market include WSCP, a cationic, polymeric algacide intended for algae control in swimming pools; PHOS 6 and PHOS 9 scale inhibitors; BPL cationic polymers, which remove suspended solids from pools; BUZYME 2516 enzymatic oil and scum remover; and BSI 332, a dispersant and scale inhibitor.

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### STUDY COVERAGE

*Water Treatment Chemicals* is a Freedonia study that presents historical demand data (2004, 2009, 2014) and forecasts (2019, 2024) by market, application and product. The study also assesses key market environment factors, examines the industry structure, analyzes company market share and profiles 35 competitors in the US industry.



## Related Studies

### World Membrane Separation Technologies

This study analyzes the global membrane industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by type (e.g., microfiltration, reverse osmosis, ultrafiltration), market (e.g., water treatment, wastewater treatment, food and beverage processing, pharmaceutical and medical), world region and major country. The study also considers market environment factors, evaluates company market share and profiles industry players. **#3325..... September 2015.....\$6500**

### Water Treatment Equipment

Demand for water treatment equipment in the US is expected to rise 5.3 percent annually to \$15.0 billion in 2019. Conventional filtration will remain the largest product segment, while disinfection equipment and membrane systems will be the fastest growing types. The municipal market will remain dominant while resource extraction leads gains. This study analyzes the \$11.6 billion US water treatment equipment industry, with forecasts for 2019 and 2024 by product, market, and application. The study also evaluates company market share and profiles industry players. **#3288..... May 2015.....\$5300**

### Biocides

Demand for specialty biocides in the US is forecast to rise 4.0 percent per year to \$3.9 billion in 2018. A construction rebound will benefit the wood preservation and paint and coatings markets, while consumer spending and manufacturing gains will support uses in manufactured goods. Nitrogen compounds and organosulfurs will be the fastest growing types. This study analyzes the \$3.1 billion US biocide industry, with forecasts for 2018 and 2023 by product, function and market. The study also evaluates company market share and profiles industry competitors. **#3211..... September 2014.....\$5300**

### World Salt

Global demand for salt is forecast to climb 1.5 percent annually to 325 million metric tons in 2018, valued at \$13.4 billion. The dominant Asia/Pacific region will be the fastest growing market. Trends in the production of chlor-alkali chemicals will continue to have the most significant effect on regional salt demand. This study analyzes the 302 million metric ton world salt industry, with forecasts for 2018 and 2023 by market, production method, world region, and for 22 countries. The study also evaluates company market share and profiles industry competitors. **#3199..... August 2014.....\$6200**

### World Water Treatment Chemicals

World water treatment chemical demand will rise 5.8 percent per year to \$30.6 billion in 2017. The fastest growth will occur in developing regions, driven by rising industrial water quality standards, more complex manufacturing processes, and efforts to improve access to safe drinking water supplies and sanitation facilities. This study analyzes the \$23.1 billion world water treatment chemical industry, with forecasts for 2017 and 2022 by product, market, world region, and for 16 countries. The study also evaluates company market share and profiles industry players. **#3122..... January 2014.....\$6100**

## About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

- Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

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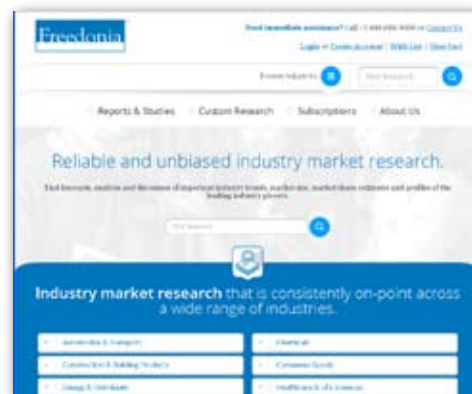
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