Water Treatment Chemicals

US Industry Study with Forecasts for 2019 & 2024

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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.

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.
MARKETS

Energy

Demand for water treatment chemicals in the energy market is forecast to grow $890 million in 2019 in dollar terms, demand in volume terms, demand in 2019 is expected to exceed 2.1 billion pounds. Demand for water treatment chemicals in the energy market, where hydraulic fracturing activities will lead to higher demand for water treatment chemicals, is expected to outpace increases in the overall 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.

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 accounted for 85 percent demand in dollar terms in 2014. pH control agents 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. These include Baker Hughes (a major supplier of refinery chemicals and fuel additives), Berwind, General Chemical Performance Products, General Electric, Kemira, and Lonza.

Table V-9

<table>
<thead>
<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
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<td>Water Use (tril gal)</td>
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<td></td>
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<td>Biocide Demand (mil lb)</td>
<td></td>
<td></td>
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<tr>
<td>$/lb</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Biocide Demand</td>
<td></td>
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<td></td>
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<tr>
<td>By Product:</td>
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<tr>
<td>Chlorine Derivatives</td>
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<tr>
<td>Chlorine</td>
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</tr>
<tr>
<td>Bromine Derivatives</td>
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<tr>
<td>Other Biocides</td>
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<tr>
<td>By Application:</td>
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<td>Potable Water</td>
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<td>Wastewater</td>
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<td>Other Applications</td>
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<td>% biocides</td>
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<td>6400</td>
<td>7500</td>
<td>8750</td>
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Source: The Freedonia Group, Inc.

Chart VI-1

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

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Sample Profile & Table, & Study Coverage

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

<table>
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<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
</tr>
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<tr>
<td>Process Water Treatment Chemical Demand</td>
<td>2675</td>
<td>2490</td>
<td>2875</td>
<td>3390</td>
<td>4000</td>
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<tr>
<td>% cooling</td>
<td>34.0</td>
<td>33.1</td>
<td>33.2</td>
<td>33.2</td>
<td>33.4</td>
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<tr>
<td>Cooling Water Treatment Chemicals</td>
<td>910</td>
<td>823</td>
<td>955</td>
<td>1125</td>
<td>1335</td>
</tr>
<tr>
<td>Corrosion &amp; Scale Inhibitors</td>
<td>575</td>
<td>435</td>
<td>520</td>
<td>620</td>
<td>740</td>
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<tr>
<td>Biocides</td>
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<td>155</td>
<td>160</td>
<td>180</td>
<td>210</td>
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<td>Coagulants &amp; Flocculants</td>
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<td>51</td>
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<td>79</td>
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<tr>
<td>$/lb</td>
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<td>0.44</td>
<td>0.49</td>
<td>0.55</td>
<td>0.63</td>
</tr>
<tr>
<td>Cooling Water Treatment Chemicals (mil lb)</td>
<td>1985</td>
<td>1875</td>
<td>1965</td>
<td>2035</td>
<td>2105</td>
</tr>
</tbody>
</table>

Source: The Freedonia Group, Inc.

Company Profiles

Buckman Laboratories International Incorporated
1256 North McLean Boulevard
Memphis, TN 38108
901-278-0330
http://www.buckman.com

Annual Sales: $640 million (estimated)
Employment: 1,500 (estimated)

Key Products: algaecides, scale and corrosion inhibitors, cationic polymers, enzymatic oil and scum removers, dispersants, coagulants, flocculants, biocides, disinfectants, dechlorinators, defoamers, oxygen scavengers, and other products.

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 algaecide 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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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. 

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.

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.

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.

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.

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- Industrial Components
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