Global Soda Ash Market: Information by Type (Natural and Synthetic), Application (Glass, Soap & Detergents, Chemicals, Pulp & Paper, Metal Processing, Water Treatment), and Region (Asia-Pacific, North America, Europe, Latin America)—Forecast till 2025

Market Synopsis

Soda ash, the trade name for sodium bicarbonate, is a white, anhydrous, powdered or granular material. It is hygroscopic and forms an odorless alkali chemical solution in water. Soda ash occurs in various kinds of mineral waters and in mineral deposits of certain springs and lake brines. The prominent source of soda ash is trona, which is a mix of sodium carbonate, sodium bicarbonate, and water. Synthetic soda ash is produced using either the Solvay or Hou process and contains a number of chemical additions. Majority of the soda ash produced is used in the manufacturing of flat glass, fiberglass, container glass, and other glasses. In addition, the product finds application in detergent manufacture; as an ingredient in the manufacture of dyes and coloring agents, synthetic detergents, and fertilizers; production of sodium derivatives; water treatment; desulphurization of flue gas; and other industrial and household applications.

The global soda ash market is expected to register a moderate CAGR of around 4% during the forecast period of 2019–2025 and is projected to be valued over USD 24 billion by the end of 2025. The global demand for the product in 2018 was around 60 million tons. Increasing demand for the product in the manufacturing of glass is likely to be the key factor favoring the global market growth. Significant growth of the glass industry on account of the widespread use of glass in the automotive, building & construction, and food & beverage industries is further expected to boost the product demand and drive the global market growth in the years to follow. Soda ash is also used in a variety of laundry and cleaning compound formulations to enhance the cleaning properties, to reduce the deposit of dirt during washing and rinsing, to soften laundry water, and to provide alkalinity for cleaning. Other household applications of soda ash include as a pH modifier in shampoos, as a soft abrasive in toothpaste, key raw material in the production of percarbonates, phosphates, and silicates which are primarily used in household cleaning products. Significant growth of the personal care and consumer goods industries globally on account of the increasing disposable income of the individual is likely to favor the global market growth during the assessment period. Furthermore, the increasing use of soda ash as an active pharmaceutical ingredient (API) and desiccant in effervescent formulations in the pharmaceutical industry is expected to provide lucrative opportunities to the market players in the years to follow.

However, fluctuating raw material prices and the environmental regulations pertaining to the usage of chemicals during the manufacturing of synthetic soda ash are expected to be the key factors restraining the market growth during the review period.

Regional Analysis

The global soda ash market has been segmented into five key regions—Asia-Pacific, North America, Europe, Latin America, and the Middle East & Africa. In 2018, Asia-Pacific accounted for the largest share of the global market on account of the significant growth of the major end-use industries including glass, detergent, and personal care & cosmetics in the region. The glass manufactured is further is used for the flat glass and mirrors, automotive glass (windshield, headlights, fiberglass), bottles for beverages and medicines, insulation materials, glassware, tableware, bulbs and other
lighting, TV screens, solar panels, tubes for televisions and computers, and laboratory ware. The automotive and food & beverage industries in the region are amongst the largest in the world and are expected to witness substantial growth in the coming years, which is likely to boost the demand for glass and hence soda ash. In 2018, China was the largest consumer of soda ash in the region with a demand of over 20 million tons of soda ash.

The North American market held the second-largest share of the global market in 2018 and is likely to witness healthy growth during the forecast period. The soaps and detergents and the building construction industries are progressively growing in the US, which is expected to drive the regional market growth. Furthermore, the high demand for soda ash in the pharmaceutical industry is also expected to fuel the growth of the regional market.

Market Segmentation

The global soda ash market has been segmented on the basis of type, application, and region. Based on type, the global soda ash market has been categorized into natural and synthetic. By application, the global soda ash market has been divided into glass, soap & detergents, chemicals, pulp & paper, metal processing, water treatment, pharmaceuticals, and others. The global soda ash market has been studied with respect to five key regions—Asia-Pacific, North America, Europe, Latin America, and the Middle East & Africa.

Key Players

Solvay (Belgium), Ciner Resources Corporation (US), Tata Chemicals Ltd (India), Genesis Energy LP (US), Shandong Haihua Group (China), Ciech SA (Poland), GHCL Limited (India), Nirma Limited, (India), Sisecam Group (Turkey), OCI COMPANY Ltd (South Korea), and Searles Valley Minerals (US) are some of the prominent players in the global soda ash market.

Intended Audience

- Soda Ash Producers
- Traders and Distributors of Soda Ash
- Research and Development Institutes
- Potential Investors
- Raw Material Suppliers
- Nationalized Laboratories

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