

# Nucleating and Clarifying Agents Market Size Share Growth Trends and Insight 2021

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CLEVE LAND, OHIO, UNITED STATE,  
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## Market Overview

The Global Nucleating and Clarifying Agents Market is predicted to grow at a high CAGR of 7.5% during the forecasting period (2021-2028).

Nucleating agents are useful for promoting the crystallization of semi-crystalline polymers such as polypropylene (PP), polyethylene (PE), polyethylene terephthalate (PET), and others. These



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agents increase the thermodynamical favorability of the crystallization process. Nucleating agents provide enhanced properties such as flexural modulus and heat deflection temperature (HDT) to the polymers. The usage of nucleating agents in polypropylene provides several benefits such as property enhancement, improved molding productivity, and increased transparency. Clarifying agents are useful for improving optical properties such as transparency, gas barrier, chemical resistance, etc.

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## Market Dynamics:

The market is driven by the increasing demand for nucleating and clarifying agents with the plastic's growing usage across the globe. According to Plastic Europe, an Association of Plastics Manufacturers, around 348 million tons of plastic were produced worldwide. The increasing

adoption of additives in packaging shall stimulate market growth. Additives enhance crystallization rate & improve the optical properties of the packaging.

There is an increase in the launch of the nucleating and clarifying agents. For instance, in May 2018, Milliken & Company had launched the new Hyperform HPN-715 agent to its Hyperform HPN nucleating agents. The new Hyperform HPN-715 agent increases stiffness by up to 10% versus competitive materials while maintaining desirable impact performance. It provides higher heat deflection temperatures (HDTs) in comparison to the other advanced nucleators. It has raised the bar for stiffness and thermal stability of polypropylene. The new Hyperform HPN-715 provides thermal stability by improving the HDT of PP. It delivers faster nucleating times in comparison to the other technologies.

In October 2019, Clariant had launched two new additives based on renewable feedstock, i.e., Licocene PE 4201 Terra and Licocare RBW 360 TP Vita. Licocene PE 4201 Terra is a highly valuable lubricant for polyolefins and a nucleating agent for EPS. Licocare RBW 360 TP Vita is a multifunctional additive that provides a combination of lubrication and nucleation agents' properties. Licocare RBW 360 TP Vita has demonstrated excellent thermal stability, low volatility and outstanding color stability.

Several companies are focusing on expanding the manufacturing capacity for the production of nucleating and clarifying agents. For instance, in May 2019, Milliken & Company had begun the largest specialty chemical plant in its history in Blacksburg, South Carolina. The new plant would increase its Millad NX 8000 clarifier capacity by 50% to help meet fast-growing global demand. This ground-breaking polypropylene additive provides plastic converters with significant sustainability and performance advantages. Millad NX 8000 would create opportunities to replace less sustainable plastics such as polystyrene and PVC with NX UltraClear PP, a polypropylene that can only be produced using the Millad NX 8000 clarifier.

## Segment Analysis

### By Form

- Powder
- Granules
- Liquid

### By Polymer

- Polypropylene
- Polyethylene
- Polyethylene Terephthalate
- Others

### By Application

- Packaging
- Consumer Products
- Automotive
- Electronics

## •Others

### Geographical Presentation

By region, the global nucleating and clarifying agents market is segmented into North America, South America, Europe, Asia-Pacific, Middle-East, and Africa. Among all of the regions, Asia-Pacific dominated the global nucleating and clarifying agents market and is expected to grow at the highest CAGR during the forecasted period due to the higher usage of the nucleating clarifying agents for packaging applications. Nucleating and clarifying agents effectively enhance the mechanical properties, thermal stability and transparency of the products. There is growing usage of nucleating and clarifying agents for the packaged food and superior quality consumer products. The increasing purchasing power and domestic income of the people shall stimulate the market growth over the forecasted period.

North America is expected to have positive market growth due to the growing usage of plastic. There is growing usage of plastics in pharmaceutical applications. The growing demand for the packaged food and superior quality consumer products shall stimulate market growth. There is the presence of several companies developing the nucleating and clarifying agents. Advanced technologies are used for the development of nucleating and clarifying agents. There is a presence of lucrative opportunities for nucleating and clarifying agents.

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### Competitive Analysis

The global nucleating and clarifying agents market is highly competitive with several international and local markets. Product diversification, revenue generation, and opportunities intensify the market competition. Milliken & Company, Adeka Corporation, BASF SE, Clariant AG, Polyone Corporation, GCH Technology Co., Ltd., Plastiblends India Limited, and New Japan Chemical Co., Ltd, the leading market players with significant market share. In November 2019, UL Environment & Sustainability, a unit of the global UL group, reviewed and certified that four grades of Milliken Chemical's Hyperform HPN enabled an average of 5-8 percent energy savings firms that injection mold thin-wall container lids or similar PP products. This certification applies to the Asia region but can be extended to global recognition.

The major players are using product development, novel product launches, market expansion, and product diversification strategies for holding their position in the market. For instance, in April 2017, Clariant, a world leader in specialty chemicals, had expanded the CESA-nuclear masterbatches designed to improve homopolymer, random, and copolymer performance polypropylenes for clear packaging applications. These are the easy-to-use formulations that provide the processors a flexible, affordable, alternative way to modify the materials. The latest CESA-nucleate formulations contain the nucleating and clarifying technology essential to solving these problems. CESA-nucleate masterbatches are available in standard or custom formulations designed for clarification and/or nucleation.

In April 2016, Riverdale Global had launched the nucleating and clarifying agents for PP & HDPE to shorten cycle times while obtaining the cost and accuracy advantages of liquid additives over pellet concentrates.

The companies enter into collaborations, mergers, strategic partnerships, and acquisitions to increase the demand for nucleating and clarifying agents and their expansion across the globe. For instance, in January 2018, PolyOne Corporation acquired IQAP Masterbatch Group S.L., a privately-owned Spanish company that manufactures specific colorants and additives for several polymer industries. The acquisition was undertaken to increase its customer base, including the transportation, packaging, consumer, wire & cable, and textiles sectors. It has two production facilities and a technology lab located in Spain. This acquisition helped the company increase its market share in the European market.

In February 2017, Adeka Corporation had acquired the additional shares of Showa Kosan Co, Ltd. Under the terms of the agreement, Showa Kosan would be a subsidiary of Adeka. This acquisition would help the company to expand sales of Adeka's products such as polymer additives, epoxy and urethane resins, as well as materials used in electronics and information technology (IT) through its long-term and stable partnership with Showa Kosan, and strive to boost shareholder value through improving profitability.

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Sai Kiran

DataM Intelligence 4Market Research LLP

+1 877-441-4866

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