

# **Global Boric Acid Market: Analysis By Purity (More than 99% and Less than 99%), By Grade (Industrial, Pharmaceutical and Other Grades), By End User (Fiberglass and Tiles, Pharmaceuticals, Ceramics, Agriculture, Flame Retardants, and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029**

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## **Abstracts**

Boric acid, also known as hydrogen borate or boracic acid, is a white, crystalline compound composed of boron, oxygen, and hydrogen ( $H_2BO_3$ ). The boric acid market encompasses the global production, distribution, and consumption of boric acid. The widespread application of boric acid makes it a versatile and unique compound typically used in diverse industrial, medical, and household applications. The global boric acid market value stood at US\$1002.13 million in 2023, and is expected to reach US\$1.38 billion by 2029.

The widespread application of boric acid makes it a versatile and unique compound typically used in diverse industrial, medical, and household applications. Boric acid finds applications in a wide range of industries, including pharmaceuticals, personal care products, agriculture, industrial manufacturing, flame retardants, wood preservation, and nuclear power. The expanding product applications across various industries, growing demand in agriculture and construction sectors, increasing use in high-tech applications, and the bolstering pharmaceutical and healthcare sectors are some of the major factors propelling the market growth. In addition, rapid industrialization, growing consumer preference for environmentally friendly products, increasing global recognition of boric acid's antiseptic and anti-inflammatory properties, rise in demand for the renewable energy industry, increasing use of boron in fiberglass insulation, growing

awareness about the benefits of boric acid in skin care products and eye drops, and increasing adoption of sustainable agriculture practices will continue to boost the growth of global boric acid market in the forecasted period. The market is expected to grow at a CAGR of 5.42% over the projected period of 2024-2029.

#### Market Segmentation Analysis:

**By Purity:** The report provides the bifurcation of the global boric acid market into two segments on the basis of purity namely, less than 99%, and more than 99%. The demand for >99% purity boric acid is driven by its unparalleled efficacy and essential role in cutting-edge applications, ensuring its continued market dominance and growth trajectory. On the basis of purity, more than 99% boric acid is the largest and fastest growing segment of the global boric acid market owing to rapidly expanding end user industries, increasing demand and production of high-performance ceramics, positive growing solar energy sector, surging demand for borosilicate glass in kitchenware and industrial equipment, increasing use of micronutrients in agriculture, rising number of large-scale infrastructure projects in emerging economies, and rising consumer demand for premium skincare products and cosmetics.

**By Grade:** The report provides the bifurcation of the global boric acid market into three segments on the basis of grade, namely, industrial, pharmaceutical, and other grades. Industrial grade is the largest segment of global boric acid market owing to rapid industrialization, increasing focus on fire safety in end user industries, rising demand for the industrial grade boric acid in the glass, textile, and construction activities, increasing focus on the use of environmentally friendly materials by manufacturers seeking compliance with environmental regulations, positive expansion of the metallurgical industry, and rise in global infrastructure construction. Pharmaceutical grade is the fastest growing segment of global boric acid market as a result of rising prevalence of infections and skin conditions, positively growing pharmaceutical industry, growing focus on female hygiene and infection control, increasing awareness among consumers about the benefits of boric acid in personal care & healthcare products, and growing trend towards use of natural and sustainable ingredients in pharmaceuticals.

**By End User:** The global boric acid market can be divided into six segments, on the basis of end user, namely, fiberglass and tiles, pharmaceuticals, ceramics, agriculture, flame retardants, and others. Fiberglass and tiles is the largest and fastest growing segment of global boric acid market as a result of increasing adoption of fiberglass in automotive and electronics industry, growing awareness of sustainable building practices, increasing preference for premium and decorative tiles in home renovation

and remodeling projects, increasing focus on fire retardancy, ongoing technological advancements in tile manufacturing, and booming construction industry in emerging markets such as China, India, and Southeast Asia.

**By Region:** The report provides insight into the global boric acid market based on regions namely, North America, Europe, Asia Pacific, and rest of the world. Asia Pacific is the largest and fastest growing region of global boric acid market owing to rapid urbanization and population growth, a strong regional consumer base of borates, rapid industrialization and agricultural activities in countries such as China, India, and Japan, an increasing adoption rate of boric acid in construction sector, the region's extensive industrial operations, high boric acid production and consumption rates in countries like China, positively growing electronics industry and expanding usage of fiberglass in automotive and pharmaceutical industries. Asia Pacific boric market is divided into five regions on the basis of geographical operations, namely, China, Japan, India, South Korea, and rest of Asia Pacific, where the China boric acid market accounted for largest revenue share owing to region's access boron reserves, booming chemical industry, growing demand for high-quality borosilicate glass in manufacturing sector, rapidly growing healthcare sector, fast-paced urbanization and infrastructure development in the region, large population and growing consumer base, strong logistics and supply chain infrastructure, and country's dominance in glass and ceramics production.

North America boric acid market has been positively growing over the years, as a result of fast urbanization, robust chemical industry, strong consumer preference for eco-friendly & sustainable products, increase in demand for boric acid in the pharmaceutical and cosmetic industries, region's diverse agricultural landscape with strong focus on high-value crops, increased consumer focus on personal care, and well-established industrial foundation and use of cutting-edge technology across various end user industries.

**By Exports:** The boric acid market exports trade value for countries like the US, Chile, Netherlands, and Argentina increased from 2021 to 2023, owing to increased demand from end user industries operating at full capacity following pandemic restrictions, positive economic growth in key markets, reduced trade restrictions in the post-COVID period, increased boric acid prices, and increased global investments in renewable energy. Also, as global trade began recovering, many countries diversified their raw materials suppliers for boric acid, increasing export opportunities for countries like the US, Chile, Netherlands, and Argentina. However, as a result of fluctuating boron prices, China and European Union experienced a fall in export trade value during the period 2021-2023. Also, market uncertainty and elevated interest rates influenced the

continued decline in the German construction industry, resulting in a reduced purchasing activity and downsizing by construction businesses. This resulted in a reduced demand for boric acid during the period. The fluctuations in pricing & demand underscored the dynamic nature of the boric acid market in Europe.

**By Imports:** The boric acid market imports trade value for countries like China, Brazil, Japan, Germany, and European Union, increased from 2021 to 2023, owing to increasing micronutrient demand in fertilizers in countries like China and Brazil with large agricultural sectors, higher consumer spending, increasing consumer awareness of hygiene and pest control after the pandemic, and escalating demand from the downstream industries i.e. pharmaceuticals, fiberglass, agriculture and construction sectors. However, the US, Japan, Germany, and European Union, experienced a fall in Boric acid imports quantity during the period 2021-2023. Boric price faced a decline in the European market primarily driven by the low consumption and ample stock holding by the domestic players. This resulted in lower imports from the major exporters like Turkey and US. Also, red sea crisis forced Turkey to slow down its calcium borate export to the major consumers Asian pacific countries like China and Taiwan.

#### Market Dynamics:

**Growth Drivers:** The global boric acid market has been rapidly growing over the past few years, due to factors such as increasing availability of boron, rapidly expanding construction industry, increasing use in healthcare and pharmaceutical sector, surge in demand for insulating materials, rapidly growing glass and textile industry, etc. The rising availability of boron, a key raw material for producing boric acid, has improved the supply chain for manufacturers. With stable and abundant supply of boron, producers are scaling up boric acid production to meet the rising demand across various industries, including glass manufacturing, agriculture, and electronics, boosting the growth of global boric acid market. In addition, boric acid's fire retardant properties make it an indispensable component in a wide range of insulating materials, especially in areas with strict fire safety codes. Therefore, growing need for fire-resistant insulation products, and ongoing development of advanced insulation technologies will continue to boost the growth of global boric acid market in the forecasted period.

**Challenges:** However, the global boric acid market growth would be negatively impacted by various challenges such as, fluctuating raw material prices, stringent government regulations, etc. The cost of raw materials used in boric acid manufacturing can be unpredictable, depending on factors such as mining activities, geopolitical difficulties, and market demand. Fluctuations in the cost of these minerals, often driven by changes

in international trade policies, availability, and mining costs, directly affects the stability of boric acid pricing, as when the prices of boron minerals rises, the cost of producing boric acid also increases, potentially decreasing its competitiveness compared to alternative products.

**Trends:** The global boric acid market is projected to grow at a fast pace during the forecasted period, owing to, emerging applications in personal care and cosmetics industry, growing focus on use of environmentally friendly materials, emerging applications in end user industries, consumption of boric acid in eco-friendly pest control, etc. Boric acid is a naturally occurring, non-toxic mineral compound with a relatively low environmental impact compared to many synthetic chemicals. As a result, increasing number of industries, particularly, agriculture, personal care, and construction industries, are shifting towards the use of eco friendly boric acid in products such as insulation materials, wood preservatives, and fertilizers. Also, boric acid is largely used as a pH regulator in many cosmetic products like toners, cleansers, and masks. The compound's ability to act as a pH adjuster and preservative largely contributes to its popularity in cosmetics formulation, as a stable pH is crucial for maintaining the effectiveness of skincare products and preventing skin irritation. In addition, boric acid exhibit mild exfoliating properties that help remove dead skin cells and improve skin texture.

#### Impact Analysis of COVID-19 and Way Forward:

COVID-19 brought in many changes in the world in terms of reduced productivity, loss of life, business closures, closing down of factories and organizations, and shift to an online mode of work. The growth of global boric acid market was negatively impacted during the period 2019-2020, as lockdown policies imposed by the government to prevent the spread of virus forced various boric acid manufacturers and end user industries to either shut down or run low on production capacity, resulting in lower production and demand for boron chemical compounds during the period, 2019-2020.

#### Competitive Landscape:

The global boric acid market is partially consolidated, with majority of regional and domestic players catering to the global demand. The key players of the market are:

3M Company

Rio Tinto (U.S. Borax)

Merck Group

Gujarat Boron Derivatives Pvt. Ltd.  
Eti Maden Operations General Directorate  
Minera Santa Rita S.R.L. (MSR)  
Rose Mill Co.  
The Chemical Company  
Quiborax  
AG Scientific Holdings LLC  
Kanto Chemical Co.,Inc.  
PhytoTech Labs, Inc.

The market exhibits high concentration, with a few key players dominating the majority of market share because of their strong brand presence and extensive distribution networks. Companies are focusing on product innovation, expanding their product portfolios, and strategic collaborations to gain a competitive edge in the market. For instance, on march 2023, Rio Tinto (U.S. Borax) announced the launch of Optibor BQ, a highly pure, powder-grade orthoboric acid ( $H_3BO_3$ ), specifically designed for use in batteries and capacitors. Similarly, in 2024, Monistat launched feminine cleansing wipes with boric acid that are gentle, fragrance-free and removes odor and discharge without irritating sensitive skin. The wipes are plant-based and contain a unique pH-balanced complex that matches a healthy pH based upon the natural range of a woman's external intimate area. Moreover, in 2023, pH-D Feminine Health announced the launch of the Boric Acid Vaginal Moisturizing Gel to its existing portfolio of holistic feminine health products available exclusively at Walgreens nationwide.



## Contents

### 1. EXECUTIVE SUMMARY

### 2. INTRODUCTION

#### 2.1 Boric Acid: An Overview

##### 2.1.1 Definition of Boric Acid

##### 2.1.2 Benefits of Using Boric Acid

#### 2.2 Boric Acid Segmentation: An Overview

##### 2.2.1 Boric Acid Segmentation

### 3. GLOBAL MARKET ANALYSIS

#### 3.1 Global Boric Acid Market: An Analysis

##### 3.1.1 Global Boric Acid Market: An Overview

##### 3.1.2 Global Boric Acid Market by Value

##### 3.1.3 Global Boric Acid Market by Purity (More Than 99%, and Less Than 99%)

##### 3.1.4 Global Boric Acid Market by Grade (Industrial, Pharmaceutical, and Other Grades)

##### 3.1.5 Global Boric Acid Market by End User (Fiberglass and Tiles, Pharmaceuticals, Ceramics, Agriculture, Flame Retardants, and Others)

##### 3.1.6 Global Boric Acid Market by Region (North America, Europe, Asia Pacific, and Rest of the World)

#### 3.2 Global Boric Acid Market: Purity Analysis

##### 3.2.1 Global Boric Acid Market: Purity Overview

##### 3.2.2 Global More than 99% Boric Acid Market by Value

##### 3.2.3 Global Less than 99% Boric Acid Market by Value

#### 3.3 Global Boric Acid Market: Grade Analysis

##### 3.3.1 Global Boric Acid Market: Grade Overview

##### 3.3.2 Global Industrial Boric Acid Market by Value

##### 3.3.3 Global Pharmaceutical Boric Acid Market by Value

##### 3.3.4 Global Other Grades Boric Acid Market by Value

#### 3.4 Global Boric Acid Market: End User Analysis

##### 3.4.1 Global Boric Acid Market: End User Overview

##### 3.4.2 Global Fiberglass and Tiles Boric Acid Market by Value

##### 3.4.3 Global Pharmaceuticals Boric Acid Market by Value

##### 3.4.4 Global Ceramics Boric Acid Market by Value

##### 3.4.5 Global Agriculture Boric Acid Market by Value

- 3.4.6 Global Flame Retardants Boric Acid Market by Value
- 3.4.7 Global Others Boric Acid Market by Value
- 3.5 Global Boric Acid Market: Exports Analysis
  - 3.5.1 Global Boric Acid Market: Exports Overview
  - 3.5.2 Global Boric Acid Market by Exports Trade Value and Quantity
- 3.6 Global Boric Acid Market: Imports Analysis
  - 3.6.1 Global Boric Acid Market: Imports Overview
  - 3.6.2 Global Boric Acid Market by Imports Trade Value and Quantity

## **4. REGIONAL MARKET ANALYSIS**

- 4.1 Asia Pacific Boric Acid Market: An Analysis
  - 4.1.1 Asia Pacific Boric Acid Market: An Overview
  - 4.1.2 Asia Pacific Boric Acid Market by Value
  - 4.1.3 Asia Pacific Boric Acid Market by End User (Fiberglass and Tiles, Pharmaceuticals, Ceramics, Agriculture, Flame Retardants, and Others)
  - 4.1.4 Asia Pacific Boric Acid Market by Region (China, Japan, India, South Korea, and Rest of Asia Pacific)
  - 4.1.5 China Boric Acid Market by Value
  - 4.1.6 Japan Boric Acid Market by Value
  - 4.1.7 India Boric Acid Market by Value
  - 4.1.8 South Korea Boric Acid Market by Value
  - 4.1.9 Rest of Asia Pacific Boric Acid Market by Value
- 4.2 North America Boric Acid Market: An Analysis
  - 4.2.1 North America Boric Acid Market: An Overview
  - 4.2.2 North America Boric Acid Market by Value
  - 4.2.3 North America Boric Acid Market by End User (Fiberglass and Tiles, Pharmaceuticals, Ceramics, Agriculture, Flame Retardants, and Others)
  - 4.2.4 North America Boric Acid Market by Region (The US, Canada, and Mexico)
  - 4.2.5 The US Boric Acid Market by Value
  - 4.2.6 Canada Boric Acid Market by Value
  - 4.2.7 Mexico Boric Acid Market by Value
- 4.3 Europe Boric Acid Market: An Analysis
  - 4.3.1 Europe Boric Acid Market: An Overview
  - 4.3.2 Europe Boric Acid Market by Value
  - 4.3.3 Europe Boric Acid Market by End User (Fiberglass and Tiles, Pharmaceuticals, Ceramics, Agriculture, Flame Retardants, and Others)
  - 4.3.4 Europe Boric Acid Market by Region (Germany, UK France, Italy, Spain, and rest of Europe)



- 4.3.5 Germany Boric Acid Market by Value
- 4.3.6 UK Boric Acid Market by Value
- 4.3.7 France Boric Acid Market by Value
- 4.3.8 Italy Boric Acid Market by Value
- 4.3.9 Spain Boric Acid Market by Value
- 4.3.10 Rest of Europe Boric Acid Market by Value
- 4.4 Rest of the World Boric Acid Market: An Analysis
  - 4.4.1 Rest of the World Boric Acid Market: An Overview
  - 4.4.2 Rest of the World Boric Acid Market by Value

## **5. IMPACT OF COVID-19**

- 5.1 Impact of COVID-19 on Global Boric Acid Market
- 5.2 Post COVID-19 Impact on Global Boric Acid Market

## **6. MARKET DYNAMICS**

- 6.1 Growth Drivers
  - 6.1.1 Increasing Availability of Boron
  - 6.1.2 Rapidly Expanding Construction Industry
  - 6.1.3 Increasing Use in Healthcare and Pharmaceutical Sector
  - 6.1.4 Surge in Demand for Insulating Materials
  - 6.1.5 Rapidly Growing Glass and Textile Industry
- 6.2 Challenges
  - 6.2.1 Fluctuating Raw Material Prices
  - 6.2.2 Stringent Government Regulations
- 6.3 Market Trends
  - 6.3.1 Emerging Applications in Personal Care and Cosmetics Industry
  - 6.3.2 Growing Focus on Use of Environmentally Friendly Materials
  - 6.3.3 Emerging Applications in End User Industries
  - 6.3.4 Consumption of Boric Acid in Eco-friendly Pest Control

## **7. COMPETITIVE LANDSCAPE**

- 7.1 Global Boric Acid Market: Competitive Landscape

## **8. COMPANY PROFILES**

- 8.1 3M Company

- 8.1.1 Business Overview
- 8.1.2 Operating Segments
- 8.1.3 Business Strategy
- 8.2 Rio Tinto (U.S. Borax)
  - 8.2.1 Business Overview
  - 8.2.2 Operating Segments
  - 8.2.3 Business Strategy
- 8.3 Merck Group
  - 8.3.1 Business Overview
  - 8.3.2 Net Sales by Business Sector
  - 8.3.3 Business Strategy
- 8.4 Gujarat Boron Derivatives Pvt. Ltd.
  - 8.4.1 Business Overview
- 8.5 Eti Maden Operations General Directorate
  - 8.5.1 Business Overview
- 8.6 Minera Santa Rita S.R.L. (MSR)
  - 8.6.1 Business Overview
- 8.7 Rose Mill Co.
  - 8.7.1 Business Overview
- 8.8 The Chemical Company
  - 8.8.1 Business Overview
- 8.9 Quiborax
  - 8.9.1 Business Overview
- 8.10 AG Scientific Holdings LLC
  - 8.10.1 Business Overview
- 8.11 Kanto Chemical Co., Inc.
  - 8.11.1 Business Overview
- 8.12 PhytoTech Labs, Inc.
  - 8.12.1 Business Overview

## List Of Figures

### LIST OF FIGURES

Figure 1: Boric Acid Segmentation

Figure 2: Global Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 3: Global Boric Acid Market by Value; 2024-2029 (US\$ Billion)

Figure 4: Global Boric Acid Market by Purity; 2023 (Percentage, %)

Figure 5: Global Boric Acid Market by Grade; 2023 (Percentage, %)

Figure 6: Global Boric Acid Market by End User; 2023 (Percentage, %)

Figure 7: Global Boric Acid Market by Region; 2023 (Percentage, %)

Figure 8: Global More than 99% Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 9: Global More than 99% Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 10: Global Less than 99% Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 11: Global Less than 99% Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 12: Global Industrial Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 13: Global Industrial Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 14: Global Pharmaceutical Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 15: Global Pharmaceutical Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 16: Global Other Grades Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 17: Global Other Grades Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 18: Global Fiberglass and Tiles Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 19: Global Fiberglass and Tiles Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 20: Global Pharmaceuticals Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 21: Global Pharmaceuticals Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 22: Global Ceramics Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 23: Global Ceramics Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 24: Global Agriculture Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 25: Global Agriculture Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 26: Global Flame Retardants Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 27: Global Flame Retardants Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 28: Global Others Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 29: Global Others Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 30: Global Boric Acid Market Exports Trade Value by Country; 2021 & 2023 (US\$ Million)

Figure 31: Global Boric Acid Market Exports Quantity by Country; 2021 & 2023 (Million Kg)

Figure 32: Global Boric Acid Imports Trade Value by Country; 2021-2023 (US\$ Million)

Figure 33: Global Boric Acid Imports Quantity by Country; 2021-2023 (Million Kg)

Figure 34: Asia Pacific Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 35: Asia Pacific Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 36: Asia Pacific Boric Acid Market by End User; 2023 and 2029 (Percentage, %)

Figure 37: Asia Pacific Boric Acid Market by Region; 2023 (Percentage, %)

Figure 38: China Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 39: China Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 40: Japan Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 41: Japan Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 42: India Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 43: India Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 44: South Korea Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 45: South Korea Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 46: Rest of Asia Pacific Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 47: Rest of Asia Pacific Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 48: North America Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 49: North America Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 50: North America Boric Acid Market by End User; 2023 and 2029 (Percentage, %)

Figure 51: North America Boric Acid Market by Region; 2023 (Percentage, %)

Figure 52: The US Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 53: The US Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 54: Canada Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 55: Canada Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 56: Mexico Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 57: Mexico Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 58: Europe Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 59: Europe Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 60: Europe Boric Acid Market by End User; 2023 (Percentage, %)

Figure 61: Europe Boric Acid Market by Region; 2023 (Percentage, %)

Figure 62: Germany Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 63: Germany Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 64: UK Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 65: UK Boric Acid Market by Value; 2024-2029 (US\$ Million)

Figure 66: France Boric Acid Market by Value; 2019-2023 (US\$ Million)

Figure 67: France Boric Acid Market by Value; 2024-2029 (US\$ Million)

- Figure 68: Italy Boric Acid Market by Value; 2019-2023 (US\$ Million)
- Figure 69: Italy Boric Acid Market by Value; 2024-2029 (US\$ Million)
- Figure 70: Spain Boric Acid Market by Value; 2019-2023 (US\$ Million)
- Figure 71: Spain Boric Acid Market by Value; 2024-2029 (US\$ Million)
- Figure 72: Rest of Europe Boric Acid Market by Value; 2019-2023 (US\$ Million)
- Figure 73: Rest of Europe Boric Acid Market by Value; 2024-2029 (US\$ Million)
- Figure 74: Rest of the World Boric Acid Market by Value; 2019-2023 (US\$ Million)
- Figure 75: Rest of the World Boric Acid Market by Value; 2024-2029 (US\$ Million)
- Figure 76: Global Market Volume Of Boron; 2024-2029 (Million Metric Tons)
- Figure 77: The US Construction Spending; March 2024- July 2024 (US\$ Billion)
- Figure 78: Global Healthcare Expenditure as a Share of GDP; 2022-2029 (Percentage, %)
- Figure 79: Global Cosmetics And Personal Care Market Size; 2022–2026 (US\$ Billion)
- Figure 80: 3M Company Net Sales by Segment; 2023 (Percentage, %)
- Figure 81: Rio Tinto Revenue by Segment; 2023 (Percentage, %)
- Figure 82: Merck Group Net Sales by Business Sector; 2023 (Percentage, %)

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