

Global Biocides Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Biocides market size is expected to reach \$ 10270 million by 2032, rising at a market growth of 3.1% CAGR during the forecast period (2026-2032).

Biocides are chemical substances or microorganisms designed to control, deter, or render harmless harmful organisms through chemical or biological means . They are critical in protecting materials and processes from microbial degradation across a wide range of applications. The industry categorizes biocides primarily by their chemical nature into organic and inorganic types, and further by specific chemical structures such as halogenated compounds (e.g., chlorinated biocides), metal compounds, phenolic biocides, and quaternary ammonium compounds (QACs) . Their function is to act as preservatives, disinfectants, and antimicrobial agents in sectors like water treatment, paints and coatings, personal care, and wood preservation. The market is characterized by significant research and development efforts focused on enhancing efficacy, safety, and environmental sustainability. Global production recently reached approximately 2,419 thousand metric tons, with an average global market price of \$3,237 per metric ton, reflecting the vast scale and essential nature of these products.

Supply Chain Structure and Downstream Dynamics

The biocide supply chain is segmented into upstream raw material suppliers, midstream manufacturers, and downstream end-users. Upstream involves providers of basic chemicals, metals, and specialty ingredients. Midstream is dominated by large, global manufacturers such as BASF SE, Dow Inc., Lanxess AG, Solvay SA, and Troy Corporation, which synthesize active ingredients and formulate them into finished products . The downstream segment encompasses a diverse set of major users, including water treatment plants, the paints and coatings industry, food and beverage

processors, personal care product manufacturers (e.g., Procter & Gamble, Unilever), and the pulp & paper sector . Procurement in these sectors is typically characterized by stringent requirements for regulatory compliance (e.g., EPA, BPR), consistent product quality, and reliable technical support. Buyers often engage in long-term contracts to ensure supply stability. Given the high R&D costs and the value-added nature of formulated products, the industry typically operates at an average gross margin of around 25%, balancing innovation costs with market competitiveness.

Market Trends and Future Outlook

The global biocide market is experiencing steady growth, propelled by several key trends. Heightened health and hygiene awareness, particularly in the wake of the COVID-19 pandemic, continues to drive demand for disinfectants and antimicrobial solutions in public spaces, healthcare, and homes . Technologically, the industry is shifting towards sustainable and eco-friendly innovations, including the development of 'green biocides' derived from natural sources and formulations with reduced environmental impact, driven by both regulatory pressure and consumer preference . Furthermore, regulatory compliance remains a major driver and a challenge, as manufacturers must navigate an evolving landscape of regional safety and environmental standards, such as the Biocidal Products Regulation (BPR) in Europe and EPA standards in the U.S. . Geographically, the Asia-Pacific region is the fastest-growing market, fueled by rapid industrialization, urbanization, and increasing manufacturing activities, particularly in China and India . This combination of drivers ensures the market remains dynamic and poised for continued expansion, with a focus on innovative and compliant solutions.

This report studies the global Biocides production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Biocides and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Biocides that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Biocides total production and demand, 2021-2032, (K MT)

Global Biocides total production value, 2021-2032, (USD Million)

Global Biocides production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Biocides consumption by region & country, CAGR, 2021-2032 & (K MT)

U.S. VS China: Biocides domestic production, consumption, key domestic manufacturers and share

Global Biocides production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K MT)

Global Biocides production by Chemical Nature, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

Global Biocides production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Biocides market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include BASF, Lanxess, Troy Corporation, Clariant, ICL, Thor, Solenis, Ecolab, Nouryon, Syensqo, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Biocides market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) by manufacturer, by Chemical Nature, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Biocides Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Biocides Market, Segmentation by Chemical Nature:

Organic Biocides

Inorganic Biocides

Global Biocides Market, Segmentation by Chemical Structure:

DBNPA

CMIT/MIT

BKC

Glutaraldehyde

Others

Global Biocides Market, Segmentation by Mode of Action:

Oxidizing Biocides

Non-oxidizing Biocides

Enzyme Inhibitors

Membrane Function Disruptors

Global Biocides Market, Segmentation by Application:

Water Treatment

Papermaking

Oil and Gas

Pharmaceuticals

Metal Processing

Paint & Coating

Wood Preservation

Others

Companies Profiled:

BASF

Lanxess

Troy Corporation

Clariant

ICL

Thor

Solenis

Ecolab

Nouryon

Syensqo

Nippon Soda

Italmatch AWS

Shandong Taihe Technologies

Henan Qingshuiyuan Technology

Key Questions Answered:

1. How big is the global Biocides market?
2. What is the demand of the global Biocides market?
3. What is the year over year growth of the global Biocides market?
4. What is the production and production value of the global Biocides market?
5. Who are the key producers in the global Biocides market?
6. What are the growth factors driving the market demand?

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