

Global Denatonium Benzoate Anhydrous Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G4B71CD965E0EN.html>

Date: August 2026

Pages: 109

Price: US\$ 4,480.00 (Single User License)

ID: G4B71CD965E0EN

Abstracts

The global Denatonium Benzoate Anhydrous market size is expected to reach \$ 366 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

Anhydrous benzoic acid denium is known globally as the organic quaternary ammonium salt with the strongest bitterness and as a safe denaturant to prevent accidental ingestion; even at an extremely low concentration (30 ppm), it produces an intense bitter taste that the human body cannot tolerate; The anhydrous process removes crystalline water, resulting in thermal stability, storage stability, and compatibility that far exceed those of the monohydrate. It is the mainstream, compliant bittering additive used in pharmaceuticals, high-end personal care products, automotive antifreeze, and industrial alcohol.

In 2025, global sales of anhydrous diammonium benzoate reached 7,469 metric tons, with an average price of \$32.56 per kilogram.

Core Growth Drivers

Mandatory Implementation of Global Safety Regulations

The EU, the U.S., China, Japan, and South Korea have all introduced mandatory addition standards for children's personal care products and automotive antifreeze; global regulatory standards for industrial alcohol denaturants have been unified, driving sustained growth in essential demand.

New Energy Vehicles Drive Demand for Automotive Chemicals

Demand has surged for coolants in new energy vehicles and rodent-resistant masterbatches for high-voltage wiring harnesses; the automotive segment is projected to grow at a CAGR of 8.1%, exceeding the industry average.

Anhydrous Products Replacing Monohydrates

High-end downstream customers are phasing out monohydrate bittering agents with poor stability; the penetration rate of anhydrous products is expected to rise from 57% in 2020 to 74% in 2025, with the replacement trend continuing.

Expansion of Animal Repellent Applications

New industrial bulk demand has emerged in areas such as rodent-proofing for photovoltaic cables and underground communication cables, as well as deer repellents for landscaping and nursery stock.

Industry Constraints

High barriers to entry for high-end synthesis processes: Purification technology for anhydrous, high-purity crystalline products (>99.9%) is monopolized by leading companies in Europe and the U.S., while most domestic manufacturers can only mass-produce 98% or 99% purity grades;

Raw material price volatility: Periodic price increases for upstream chemical intermediates such as xylenamine and diethylamine are squeezing profit margins;

Competition from low-cost, low-end substitutes: Low-end monohydrate gentianin and other plant-based bitter agents are diverting demand in the low-end industrial market.

This report studies the global Denatonium Benzoate Anhydrous production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Denatonium Benzoate Anhydrous 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 Denatonium Benzoate Anhydrous that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Denatonium Benzoate Anhydrous total production and demand, 2021-2032, (Ton)

Global Denatonium Benzoate Anhydrous total production value, 2021-2032, (USD Million)

Global Denatonium Benzoate Anhydrous production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Ton), (based on production site)

Global Denatonium Benzoate Anhydrous consumption by region & country, CAGR, 2021-2032 & (Ton)

U.S. VS China: Denatonium Benzoate Anhydrous domestic production, consumption, key domestic manufacturers and share

Global Denatonium Benzoate Anhydrous production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Ton)

Global Denatonium Benzoate Anhydrous production by Purity, production, value, CAGR, 2021-2032, (USD Million) & (Ton)

Global Denatonium Benzoate Anhydrous production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Ton)

This report profiles key players in the global Denatonium Benzoate Anhydrous 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 Zhengzhou Beth Food Additive, Johnson Matthey, Zhejiang Synose Tech, Dhaval Dyes, UPL, Sentinalco, Shanxi Laike Bio, Nikita Transphase Adducts, Wincom Inc., 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 Denatonium Benzoate Anhydrous market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Ton) and average price (US\$/Kg) by manufacturer, by Purity, 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 Denatonium Benzoate Anhydrous Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Denatonium Benzoate Anhydrous Market, Segmentation by Purity:

? 98?

? 99?

? 99.9%

Global Denatonium Benzoate Anhydrous Market, Segmentation by Grade:

Industrial General-Purpose Grade

Consumer Products and Food Additive Grade

High-Purity Pharmaceutical and Laboratory Reagent Grade

Global Denatonium Benzoate Anhydrous Market, Segmentation by Sales Channels:

Direct Sales

Distribution

Global Denatonium Benzoate Anhydrous Market, Segmentation by Application:

Automotive Chemicals

Cosmetics and Personal Care

Daily Necessities

Pesticide

Paints and Coatings

Others

Companies Profiled:

Zhengzhou Beth Food Additive

Johnson Matthey

Zhejiang Synose Tech

Dhaval Dyes

UPL

Sentinalco

Shanxi Laike Bio

Nikita Transphase Adducts

Wincom Inc.

Key Questions Answered:

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

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