

Global Non-oxidizing Bactericides Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Non-oxidizing Bactericides market size is expected to reach \$ 4027 million by 2032, rising at a market growth of 4.1% CAGR during the forecast period (2026-2032).

Non-oxidizing bactericides are chemical agents that kill microorganisms without relying on oxidation reactions, but rather by disrupting cell membranes, inhibiting enzyme activity, or interfering with metabolic processes. They are widely used in water treatment, oil and gas, papermaking, and industrial recycling systems. The global market price for non-oxidizing bactericides is \$1,553 per ton, with annual sales of approximately 1.9 million tons and a global annual production capacity of approximately 2 million tons. The industry profit margin is 10%.

Global Regional Market Landscape

North America: A key global market with mature industrial circulating water, energy and chemical, manufacturing, and membrane reuse systems. Customers emphasize verifiable bactericidal effects, online monitoring, on-site service, and closed-loop compliance documentation. The EPA's registration management of antimicrobial products under the FIFRA framework further strengthens market entry barriers.
Europe: Stricter regulations. The BPR requires dual compliance for active substances and product authorization, coupled with Legionella control, environmental emissions, and long-term stable system operation requirements. The market prefers solutions with high reliability, low side effects, and complete evidence chains.
Asia Pacific: Leading growth rate. With a high concentration of manufacturing, industrial parks, and large water usage in industries such as paper and electronics, demand for cooling water and process water treatment is strong. The focus of competition is 'formulation compatibility + dosing flexibility + cost-effectiveness + localized service response.' LANXESS has

specifically launched a water treatment microbial control product portfolio for APAC. Emerging Markets: Primarily focused on basic industrial cooling water, general process water, and resource development scenarios. Customers are more cost-sensitive, but as downtime losses and the costs of MIC corrosion are re-evaluated, demand for highly efficient non-oxidizing bactericides is steadily increasing.

Upstream and Downstream Industry Chain

From Active Material Formulation to Collaborative Delivery of Online Monitoring and On-site Services

Upstream: Active materials such as isothiazolinones, DBNPA, THPS, guanidines/quaternary ammonium salts, etc., along with supporting solvents, stabilizers, dispersants, corrosion and scale inhibitors, as well as metering pumps, automatic dosing devices, solid dosing devices, and online monitoring and control systems. Nalco publicly demonstrated a solid non-oxidizing bactericide dosing device for HVAC open cooling systems; Solenis integrates biofilm monitoring and dosing control as part of its overall solution. Downstream Typical Customers: Cooling towers in petrochemical and chemical plants, circulating water systems in power plants, RO/UF membrane water plants, liquid cooling loops in data centers and manufacturing, wet end systems in pulp and paper mills, oil and gas production/reinjection/fracturing water systems, and industrial water storage and distribution systems. Public application data from Veolia, LANXESS, THOR, and Baker Hughes all show that the value of non-oxidizing bactericides has expanded from single-point sterilization to reducing slime, inhibiting biofilm, lowering MIC, and extending membrane and equipment lifespan.

Technological Trends and Innovations

1) From Single Agents to Integrated 'Oxidation + Non-Oxidation + Dispersion + Monitoring' Processes: Mainstream suppliers are increasingly moving away from selling single non-oxidizing biocides and instead packaging them with oxidizing agents, biodispersants, automated dosing, and monitoring technologies to enhance systemic control. Publicly available solutions from Nalco Water, Solenis, and Baker Hughes demonstrate this trend. 2) Optimization of Membrane System Compatibility with Sensitive Materials: Veolia positions BioMate as an EPA-registered non-oxidizing biocide compatible with RO/UF membranes; DuPont, in its DBNPA technical documentation, specifically notes that biocides and their degradation products are not necessarily completely retained by RO membranes, and shock dosing may require permeate discharge and alkaline washing to remove dead biofilm. This indicates that

future innovation will focus not only on 'faster killing,' but also on 'cleaner killing, more membrane-friendly treatment, and more controllable post-treatment.' 3) Greater emphasis on green, precise, and low total dosage: The EPA has cited THPS as a relatively 'green' industrial biocidal chemical, emphasizing its low recommended dosage, rapid environmental degradation, and low bioaccumulation. Solenis, in 2024, publicly demonstrated a new approach to optimize bactericide dosing by measuring biofilm thickness in real time. The industry will shift from 'experience-based dosing' to 'precise dosing based on risk, data, and system status.'

Policy and Compliance

The bottom line is traceability in product registration, labeling, system records, and emission control. Non-oxidizing bactericides are not ordinary adjuvants but highly regulated antimicrobial products. In the US, the EPA manages antimicrobial pesticides under the FIFRA framework and has specific regulations for data requirements, registration, and labeling. In the EU, the BPR explicitly requires that active substances be approved and products authorized before they can be marketed and used. For cooling tower systems, HSE ACOP L8 and related technical guidelines emphasize identifying Legionella risks, developing control plans, implementing monitoring, maintaining records, and designating responsible parties. In other words, the real industry barrier isn't just about being able to formulate a product, but rather 'whether it can be sold legally, used correctly, and its effectiveness and responsibility chain can be documented.'

Future Outlook

From 'Auxiliary Agent' to 'Core Biocontrol Platform for Highly Stable Industrial Water Systems'

As industrial systems move towards high reuse, low downtime, low energy consumption, and high reliability, the value of non-oxidizing bactericides is being redefined?they are no longer just a barrel of chemicals in cooling towers or membrane systems, but a critical control platform directly impacting heat exchange efficiency, membrane cleaning cycles, corrosion rates, downtime losses, Legionella risk, and EHS pressure. The future winners will often not be the lowest-priced suppliers, but rather the supply chain that can deeply integrate active substance systems, biofilm mechanisms, programmed dosing, online monitoring, label compliance, and on-site services, enabling customers to achieve 'more accurate disinfection, more stable membranes, cleaner towers, and less downtime.' Major manufacturers such as Veolia, Nalco Water, Solenis,

and LANXESS have already outlined this roadmap in their publicly available product and service systems.

This report studies the global Non-oxidizing Bactericides production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Non-oxidizing Bactericides 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 Non-oxidizing Bactericides that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Non-oxidizing Bactericides total production and demand, 2021-2032, (Tons)

Global Non-oxidizing Bactericides total production value, 2021-2032, (USD Million)

Global Non-oxidizing Bactericides production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Non-oxidizing Bactericides consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Non-oxidizing Bactericides domestic production, consumption, key domestic manufacturers and share

Global Non-oxidizing Bactericides production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Non-oxidizing Bactericides production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Non-oxidizing Bactericides production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Non-oxidizing Bactericides 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 PWT Chemicals, Veolia, Solenis, Sunair Green, KingLee, Italmatch Chemicals, Nouryon, LANXESS, Ecolab (Nalco Water), Kurita, 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 Non-oxidizing Bactericides market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, 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 Non-oxidizing Bactericides Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Non-oxidizing Bactericides Market, Segmentation by Type:

Single-Component

Two-Component Combination

Multi-Component Synergistic Effect

Global Non-oxidizing Bactericides Market, Segmentation by Chemical Composition:

Isothiazolinones

Glutaraldehydes

Quaternary Ammonium Salts

THPS

DBNPA

Organic Sulfur Compounds

Others

Global Non-oxidizing Bactericides Market, Segmentation by Mechanism of Action:

Cell Membrane Disruption Type

Enzyme Activity Inhibition Type

Protein Synthesis Interference Type

Metabolic Inhibition Type

Cell Penetration and Disruption Type

Global Non-oxidizing Bactericides Market, Segmentation by Application:

Power Plant

Chemical Industry

Metallurgy

Water Plant

Other

Companies Profiled:

PWT Chemicals

Veolia

Solenis

Sunair Green

KingLee

Italmatch Chemicals

Nouryon

LANXESS

Ecolab (Nalco Water)

Kurita

Accepta

Chardon Labs

Buckman

SNF

New Land

TH Water

Shandong IRO Oil Drilling Chemical

Golden Chemical

Risun

Prio

GZ-KK

Key Questions Answered:

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

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