

# **Biocides Market Forecasts to 2032 – Global Analysis By Product (Disinfectants, Preservatives, Pest Control, Antifouling Agents and Other Products), Type, Application, End User and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Biocides Market is accounted for \$10.4 billion in 2025 and is expected to reach \$16.6 billion by 2032 growing at a CAGR of 6.9% during the forecast period. Biocides are chemical substances or microorganisms designed to control, deter, or eliminate harmful organisms through chemical or biological means. They are widely used in healthcare, agriculture, industry, and public hygiene to disinfect surfaces, preserve materials, and manage pests. Biocides include disinfectants, preservatives, insecticides, fungicides, and rodenticides. Their effectiveness depends on concentration, exposure time, and the target organism. While essential for controlling microbial growth and contamination, improper use can lead to environmental harm and antimicrobial resistance. Regulatory frameworks ensure safe application and limit toxicity. Biocides may be synthetic or naturally derived, and their use spans from household cleaning products to industrial water treatment.

Market Dynamics:

Driver:

Water Treatment Demand

The rising global emphasis on clean water access and stringent sanitation norms is driving biocide adoption in municipal and industrial water treatment. Increasing demand for effective microbial control in cooling towers, wastewater systems, and desalination plants is accelerating market growth. Regulatory mandates for safe discharge and

environmental compliance further reinforce biocide usage. This sustained demand, especially in emerging economies, positions water treatment as a key catalyst for long-term expansion across the global biocides market.

Restraint:

### Regulatory Challenges

Stringent and fragmented regulatory frameworks across regions are stalling innovation and market entry in the biocides sector. Lengthy approval timelines, shifting compliance standards, and costly re-registration processes are deterring smaller players and delaying product launches. These constraints hinder R&D investment and reduce operational agility, especially in emerging markets. As a result, manufacturers face increased costs and limited scalability, weakening competitive positioning and slowing adoption of next-generation, eco-friendly biocidal solutions.

Opportunity:

### Personal Care and Hygiene

The surge in consumer awareness around hygiene, coupled with rising demand for preservative efficacy in personal care products, presents a lucrative opportunity for biocide manufacturers. Applications in skincare, haircare, and cosmetics are expanding, driven by antimicrobial protection and shelf-life extension. Post-pandemic behavioral shifts and premiumization trends in wellness are further amplifying demand. Innovations in natural and skin-friendly biocides are unlocking new growth avenues, especially in Asia and Latin America's fast-evolving personal care markets.

Threat:

### High Production Costs

High production costs significantly hinder the biocides market by inflating end-product prices, reducing competitiveness, and deterring adoption across cost-sensitive sectors like agriculture and water treatment. These elevated costs strain profit margins, limit innovation, and discourage smaller players from entering the market. Additionally, regulatory compliance and raw material volatility exacerbate financial pressures, slowing market expansion and delaying sustainable, next-gen biocide development—ultimately stalling broader industry transformation.

## Covid-19 Impact

The Covid-19 pandemic significantly accelerated demand in the biocides market, driven by heightened hygiene awareness and disinfection needs across healthcare, industrial, and residential sectors. Regulatory bodies fast-tracked approvals, while manufacturers scaled production of antimicrobial agents. Though supply chain disruptions posed initial challenges, the surge in sanitation protocols globally catalyzed long-term growth. This shift reinforced biocides' role in public health infrastructure and reshaped market priorities toward safety and efficacy.

The pharmaceuticals segment is expected to be the largest during the forecast period

The pharmaceuticals segment is expected to account for the largest market share during the forecast period, due to demand for high-efficacy antimicrobial agents essential for sterile manufacturing environments and infection control. As pharmaceutical production scales globally, especially in biologics and injectables, the need for advanced biocidal formulations intensifies. This surge promotes innovation in eco-friendly, aligning with stringent regulatory standards. The sector's emphasis on hygiene and contamination prevention reinforces biocides' role in safeguarding product integrity, thereby accelerating market growth.

The agriculture segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the agriculture segment is predicted to witness the highest growth rate, due to increasing demand for crop protection and post-harvest preservation. Biocides play a pivotal role in controlling microbial spoilage, enhancing yield, and extending shelf life. Growing adoption of sustainable farming practices and biocide-integrated irrigation systems is fueling innovation. Emerging markets in Latin America and Asia are witnessing rapid uptake, supported by government initiatives and rising food security concerns. This dynamic growth trajectory positions agriculture as a key expansion frontier.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to robust industrialization, expanding pharmaceutical and personal care sectors, and rising water treatment investments. Countries like China, India, and Japan

are witnessing strong biocide demand across manufacturing, agriculture, and municipal applications. Favorable regulatory reforms, cost-effective production, and growing consumer awareness further support regional dominance. The region's diverse end-use landscape and strategic focus on hygiene and sustainability make it a cornerstone of global biocide consumption.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to technological advancements, stringent regulatory standards, and rising demand for high-performance biocides. The region's mature pharmaceutical and healthcare infrastructure, coupled with innovation in eco-friendly formulations, is accelerating adoption. Increasing investments in water treatment and food safety, along with heightened consumer expectations for hygiene, are fueling growth. Strategic collaborations and R&D initiatives across the U.S. and Canada are further enhancing market agility and expansion potential.

Key players in the market

Some of the key players profiled in the Biocides Market include BASF SE, The Dow Chemical Company, LANXESS AG, Clariant AG, Solvay S.A., Akzo Nobel N.V., Albemarle Corporation, Thor Group Limited, Lonza Group AG, Kemira Oyj, Ecolab Inc., Nouryon, Troy Corporation, Vink Chemicals GmbH & Co. KG, Stepan Company, Baker Hughes Company, Italmatch Chemicals S.p.A., Lubrizol Corporation, Ashland Global Holdings Inc. and FMC Corporation.

Key Developments:

In August 2025, BASF and Univar Solutions have expanded their distribution agreement in North America. Univar Solutions, including its Canadian division, will now serve as the exclusive distributor for selected BASF products in the coatings, adhesives, sealants, and elastomers (CASE) market. This collaboration aims to enhance customer access to BASF's innovative solutions and strengthen their market presence across the region.

In July 2025, BASF and Equinor have entered a decade-long strategic partnership, with Equinor set to supply up to 23 terawatt hours of natural gas annually to BASF's European operations. This agreement, aims to fulfill a significant portion of BASF's energy and feedstock requirements, supporting its sustainability objectives.

**Products Covered:**

Disinfectants

Preservatives

Pest Control

Antifouling Agents

Other Products

**Types Covered:**

Halogen Compounds

Metallic Compounds

Organosulfur Compounds

Organic Acids

Phenolics

Quaternary Ammonium Compounds

Other Types

**Applications Covered:**

Water Treatment

Food & Beverage

Personal Care

Wood Preservation

Paints & Coatings

Oil & Gas

Pulp & Paper

Other Applications

#### End Users Covered:

Healthcare

Agriculture

Construction

Pharmaceuticals

Marine

Textile

Other End Users

#### Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

### **Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as

per the client's interest (Note: Depends on feasibility check)

### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

## Contents

### **1 EXECUTIVE SUMMARY**

### **2 PREFACE**

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
  - 2.4.1 Data Mining
  - 2.4.2 Data Analysis
  - 2.4.3 Data Validation
  - 2.4.4 Research Approach
- 2.5 Research Sources
  - 2.5.1 Primary Research Sources
  - 2.5.2 Secondary Research Sources
  - 2.5.3 Assumptions

### **3 MARKET TREND ANALYSIS**

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Product Analysis
- 3.7 Application Analysis
- 3.8 End User Analysis
- 3.9 Emerging Markets
- 3.10 Impact of Covid-19

### **4 PORTERS FIVE FORCE ANALYSIS**

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

## **5 GLOBAL BIOCIDES MARKET, BY PRODUCT**

- 5.1 Introduction
- 5.2 Disinfectants
- 5.3 Preservatives
- 5.4 Pest Control
- 5.5 Antifouling Agents
- 5.6 Other Products

## **6 GLOBAL BIOCIDES MARKET, BY TYPE**

- 6.1 Introduction
- 6.2 Halogen Compounds
- 6.3 Metallic Compounds
- 6.4 Organosulfur Compounds
- 6.5 Organic Acids
- 6.6 Phenolics
- 6.7 Quaternary Ammonium Compounds
- 6.8 Other Types

## **7 GLOBAL BIOCIDES MARKET, BY APPLICATION**

- 7.1 Introduction
- 7.2 Water Treatment
- 7.3 Food & Beverage
- 7.4 Personal Care
- 7.5 Wood Preservation
- 7.6 Paints & Coatings
- 7.7 Oil & Gas
- 7.8 Pulp & Paper
- 7.9 Other Applications

## **8 GLOBAL BIOCIDES MARKET, BY END USER**

- 8.1 Introduction
- 8.2 Healthcare
- 8.3 Agriculture
- 8.4 Construction

- 8.5 Pharmaceuticals
- 8.6 Marine
- 8.7 Textile
- 8.8 Other End Users

## **9 GLOBAL BIOCIDES MARKET, BY GEOGRAPHY**

- 9.1 Introduction
- 9.2 North America
  - 9.2.1 US
  - 9.2.2 Canada
  - 9.2.3 Mexico
- 9.3 Europe
  - 9.3.1 Germany
  - 9.3.2 UK
  - 9.3.3 Italy
  - 9.3.4 France
  - 9.3.5 Spain
  - 9.3.6 Rest of Europe
- 9.4 Asia Pacific
  - 9.4.1 Japan
  - 9.4.2 China
  - 9.4.3 India
  - 9.4.4 Australia
  - 9.4.5 New Zealand
  - 9.4.6 South Korea
  - 9.4.7 Rest of Asia Pacific
- 9.5 South America
  - 9.5.1 Argentina
  - 9.5.2 Brazil
  - 9.5.3 Chile
  - 9.5.4 Rest of South America
- 9.6 Middle East & Africa
  - 9.6.1 Saudi Arabia
  - 9.6.2 UAE
  - 9.6.3 Qatar
  - 9.6.4 South Africa
  - 9.6.5 Rest of Middle East & Africa

## **10 KEY DEVELOPMENTS**

- 10.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 10.2 Acquisitions & Mergers
- 10.3 New Product Launch
- 10.4 Expansions
- 10.5 Other Key Strategies

## **11 COMPANY PROFILING**

- 11.1 BASF SE
- 11.2 The Dow Chemical Company
- 11.3 LANXESS AG
- 11.4 Clariant AG
- 11.5 Solvay S.A.
- 11.6 Akzo Nobel N.V.
- 11.7 Albemarle Corporation
- 11.8 Thor Group Limited
- 11.9 Lonza Group AG
- 11.10 Kemira Oyj
- 11.11 Ecolab Inc.
- 11.12 Nouryon
- 11.13 Troy Corporation
- 11.14 Vink Chemicals GmbH & Co. KG
- 11.15 Stepan Company
- 11.16 Baker Hughes Company
- 11.17 Italmatch Chemicals S.p.A.
- 11.18 Lubrizol Corporation
- 11.19 Ashland Global Holdings Inc.
- 11.20 FMC Corporation

## List Of Tables

### LIST OF TABLES

- Table 1 Global Biocides Market Outlook, By Region (2024-2032) (\$MN)
- Table 2 Global Biocides Market Outlook, By Product (2024-2032) (\$MN)
- Table 3 Global Biocides Market Outlook, By Disinfectants (2024-2032) (\$MN)
- Table 4 Global Biocides Market Outlook, By Preservatives (2024-2032) (\$MN)
- Table 5 Global Biocides Market Outlook, By Pest Control (2024-2032) (\$MN)
- Table 6 Global Biocides Market Outlook, By Antifouling Agents (2024-2032) (\$MN)
- Table 7 Global Biocides Market Outlook, By Other Products (2024-2032) (\$MN)
- Table 8 Global Biocides Market Outlook, By Type (2024-2032) (\$MN)
- Table 9 Global Biocides Market Outlook, By Halogen Compounds (2024-2032) (\$MN)
- Table 10 Global Biocides Market Outlook, By Metallic Compounds (2024-2032) (\$MN)
- Table 11 Global Biocides Market Outlook, By Organosulfur Compounds (2024-2032) (\$MN)
- Table 12 Global Biocides Market Outlook, By Organic Acids (2024-2032) (\$MN)
- Table 13 Global Biocides Market Outlook, By Phenolics (2024-2032) (\$MN)
- Table 14 Global Biocides Market Outlook, By Quaternary Ammonium Compounds (2024-2032) (\$MN)
- Table 15 Global Biocides Market Outlook, By Other Types (2024-2032) (\$MN)
- Table 16 Global Biocides Market Outlook, By Application (2024-2032) (\$MN)
- Table 17 Global Biocides Market Outlook, By Water Treatment (2024-2032) (\$MN)
- Table 18 Global Biocides Market Outlook, By Food & Beverage (2024-2032) (\$MN)
- Table 19 Global Biocides Market Outlook, By Personal Care (2024-2032) (\$MN)
- Table 20 Global Biocides Market Outlook, By Wood Preservation (2024-2032) (\$MN)
- Table 21 Global Biocides Market Outlook, By Paints & Coatings (2024-2032) (\$MN)
- Table 22 Global Biocides Market Outlook, By Oil & Gas (2024-2032) (\$MN)
- Table 23 Global Biocides Market Outlook, By Pulp & Paper (2024-2032) (\$MN)
- Table 24 Global Biocides Market Outlook, By Other Applications (2024-2032) (\$MN)
- Table 25 Global Biocides Market Outlook, By End User (2024-2032) (\$MN)
- Table 26 Global Biocides Market Outlook, By Healthcare (2024-2032) (\$MN)
- Table 27 Global Biocides Market Outlook, By Agriculture (2024-2032) (\$MN)
- Table 28 Global Biocides Market Outlook, By Construction (2024-2032) (\$MN)
- Table 29 Global Biocides Market Outlook, By Pharmaceuticals (2024-2032) (\$MN)
- Table 30 Global Biocides Market Outlook, By Marine (2024-2032) (\$MN)
- Table 31 Global Biocides Market Outlook, By Textile (2024-2032) (\$MN)
- Table 32 Global Biocides Market Outlook, By Other End Users (2024-2032) (\$MN)
- Note: Tables for North America, Europe, APAC, South America, and Middle East &

Africa Regions are also represented in the same manner as above.

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