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Metal Biocides Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Zinc, Silver, Copper & Alloys, Others), By End User (Medical, Textile, Wood Preservation, Paints & Coatings, Food & Beverages, Pesticides, Others), By Region and Competition

https://marketpublishers.com/r/MAFB893D9077EN.html
Date: November 2023
Pages: 180
Price: US$ 4,900.00 (Single User License)
ID: MAFB893D9077EN

Abstracts

Global Metal Biocides Market has valued at USD3.66 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.82% through 2028. Metal biocides are highly effective substances specifically designed to combat, neutralize, deter, or exert control over harmful organisms like bacteria, fungi, algae, and other pathogens. These biocides utilize metals such as copper (Cu), magnesium (Mg), mercury (Hg), tellurium (Te), arsenic (As), and gold (Au) as antibacterial agents, antifungal agents, preservatives, insecticides, disinfectants, and pesticides. They find applications across diverse sectors including paints & coatings, textiles, water treatment, medicine, and more.

The growing investments in infrastructure development in countries like the U.S., China, Japan, Mexico, and India have significantly boosted the building & construction sector. This sector, in turn, has witnessed a substantial increase in the demand for metal biocides, particularly in addressing issues related to exterior coatings affected by airborne algae and fungi due to environmental exposure. This factor is expected to act as a key driver for the growth of the metal biocides market. Additionally, the rising awareness about cleanliness and hygiene has led to an increased demand for personal care products containing biocides like triacetin, undecylenic acid, resorcinol, and others. These biocides are commonly found in mouthwashes, toothpastes, shaving gels, and deodorants. Moreover, metal biocides are extensively used in cosmetic formulations to

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decontaminate the skin, eliminating bacteria, algae, insects, and other harmful elements. This is projected to further propel the growth of the metal biocides market in the forecast period.

However, it is worth noting that there are alternative substitutes available for metal biocides, such as chelating molecules, scavengers, isothiazolinone, phenols, alcohols, and others. These substitutes possess similar characteristics to metal biocides and are often available at more affordable prices. Consequently, buyers have shown a preference for these substitutes, which is expected to restrain the growth of the metal biocides market during the forecast period.

Key Market Drivers

Growing Demand of Metal Biocides in Medical Industry

Metal biocides are chemical compounds widely utilized to control or eradicate the growth of harmful microorganisms. They find applications in diverse industries such as water treatment, paints and coatings, textiles, and pesticides. However, it is the remarkable increase in their usage within the medical industry that deserves special attention.

The ongoing health crisis has markedly heightened awareness regarding the significance of hygiene and cleanliness, leading to a surge in demand for metal biocides. These chemicals play a crucial role in preventing the spread of harmful bacteria and viruses in healthcare settings, thus ensuring the safety of patients and healthcare professionals alike.

The rise in the use of advanced medical devices has also contributed to the growing need for metal biocides. These substances are frequently employed in the manufacturing of medical devices to impede bacterial growth and guarantee the devices' safety and effectiveness.

Furthermore, the overall expansion of the healthcare sector is driving the demand for metal biocides. As the sector continues to grow, the need for effective biocides to maintain high standards of hygiene and patient care also intensifies.

The growing demand from the medical industry is significantly influencing the global metal biocides market. This demand not only propels market growth but also stimulates innovation in the development of more effective and safer metal biocides.

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The pivotal role played by the medical industry in driving the metal biocides market is expected to persist in the future. With increasing health consciousness and the continual growth of the healthcare sector, the demand for metal biocides is poised to follow suit.

In conclusion, the escalating demand for metal biocides in the medical industry serves as a key driver of the global metal biocides market. As this trend continues, it will undoubtedly shape the future of the market, fostering growth and innovation in the years to come.

Growing Demand of Metal Biocides in Agriculture Industry

Metal biocides play a crucial role in safeguarding crops from the devastating impact of pests and diseases, which can have a significant negative effect on both yield and quality. Recognizing this, farmers are increasingly embracing the use of these substances to ensure bountiful and healthy harvests.

With an ever-growing emphasis on sustainable farming practices, metal biocides are gaining recognition for their potential to reduce reliance on harmful pesticides. This shift towards eco-friendly agriculture is not only driven by environmental concerns but also by the need to meet the rising demand for safe and nutritious food.

Furthermore, the expansion of the agriculture sector itself is fueling the demand for effective metal biocides. As the industry strives to meet the food requirements of a continuously growing global population, the need for these essential substances becomes even more pronounced.

The increasing demand from the agriculture industry is not only shaping the global metal biocides market but also driving innovation in the development of safer and more efficient solutions. This surge in demand is serving as a catalyst for market growth, fostering advancements that ensure both effectiveness and safety.

The pivotal role of the agriculture industry in propelling the metal biocides market is expected to persist in the future. As sustainable farming practices become more widespread and the urgency for crop protection continues to mount, the demand for metal biocides is projected to rise correspondingly.

In conclusion, the surging demand for metal biocides within the agriculture industry

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serves as a key driver for the global metal biocides market. This trend is poised to shape the market's trajectory, fostering growth and innovation for years to come, while simultaneously addressing the pressing challenges of sustainable food production.

Key Market Challenges

Volatility in Product Development Cost

One of the primary factors contributing to the volatility of product development costs is the fluctuating prices of raw materials. These raw materials, such as metals used in metal biocides, are subject to market forces that can be influenced by factors like supply and demand, geopolitical events, and natural disasters. As a result, any changes in the cost of these materials directly impact the production costs of metal biocides, creating a level of uncertainty and risk for manufacturers.

Another factor that adds to the cost volatility is the expense associated with regulatory compliance. The production of metal biocides is subject to stringent regulations aimed at ensuring a high level of protection for humans and the environment. These regulations can encompass various aspects, including safety standards, environmental impact assessments, and product labeling requirements. Complying with these regulations often entails additional costs, such as conducting extensive testing, implementing quality control measures, and obtaining necessary certifications. Moreover, these costs can vary depending on changes in legislation or the introduction of new regulatory requirements.

The cost of research and development (R&D) also plays a significant role in the volatility of product development costs. R&D activities are crucial for innovation and continual product improvement, allowing companies to stay competitive and meet evolving customer demands. However, R&D can be an expensive and unpredictable endeavor. It involves investing in specialized equipment, hiring skilled researchers, conducting experiments, and analyzing data. Additionally, R&D projects can face challenges and setbacks that may require additional resources and time, further adding to the overall cost volatility.

By considering these factors in product development, manufacturers can proactively address cost volatility and make informed decisions to mitigate risks and maintain profitability.

Key Market Trends

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Growing Concerns About Microbial Contamination

Microbial contamination refers to the presence of microorganisms such as bacteria, viruses, and fungi, which are considered undesirable due to their potential to cause product deterioration, health problems, and antimicrobial resistance. This issue has become a major concern in various sectors, including food and beverage, pharmaceuticals, and healthcare.

In the paints and coatings industry, microbial contamination can have detrimental effects on the quality and performance of the products. It can lead to discoloration, foul odors, and reduced durability, compromising the overall effectiveness and longevity of the coatings. To address this issue, there is a growing demand for biocides, which are chemical substances that can prevent or inhibit the growth of microorganisms, ensuring the maintenance of product quality and integrity.

The rising concerns about microbial contamination have specifically impacted the market for metal biocides. Metal biocides, such as silver and copper-based compounds, have shown significant efficacy in controlling microbial activities in various applications. This has led to increased adoption of metal biocides in industries such as paints and coatings, textiles, and water treatment. The global market for metal biocides has witnessed substantial growth as a result of this trend, with manufacturers investing in research and development to develop more effective and safer metal biocides.

In conclusion, the growing concerns about microbial contamination have shaped the global metal biocides market. As industries strive to maintain product quality and safety, the demand for metal biocides is expected to continue to rise. This trend not only drives market growth but also stimulates innovation in the development of advanced metal biocides with enhanced antimicrobial properties.

Segmental Insights

Type Insights

Based on the category of type, the silver segment emerged as the dominant player in the global market for Metal Biocides in 2022. This increasing popularity of silver biocides can be attributed to their wide range of applications. These biocides are now commonly used in water treatment, fibers, washing machines, dyes/paints & varnishes, polymers, medical applications, sinks & sanitary ceramics, and various consumer

products such as disinfectants, cosmetics, cleaning agents, baby bottles, and more. The antibacterial and disinfectant properties of silver biocides have made them highly sought-after, especially as there is a growing awareness about hygiene and cleanliness-related activities. This has resulted in customers gravitating towards silver biocide-based products across various end-use sectors. The versatility and effectiveness of silver metal biocides have further cemented their position in the market.

End User Insights

The paints & coatings segment is projected to experience rapid growth during the forecast period. The rapid growth in population has had a profound impact on the building and construction sector, leading to a significant surge in demand. As a result, the paints and coatings sector has also experienced remarkable growth, particularly in the utilization of metal biocides. These biocides play a crucial role in preventing bacteria from spoiling paint during storage and inhibiting the growth of fungi, algae, and other micro-organisms on applied paint surfaces.

To illustrate the magnitude of this growth, a report published by the U.S. Census Bureau revealed that total construction spending in February 2022 reached an estimated seasonally adjusted annual rate of $1,704.4 billion. This represents a substantial 11.2% increase compared to the February 2021 estimate of $1,533.3 billion. Such impressive figures highlight the significant contribution of the paints and coatings segment to the global market.

As the demand for construction continues to soar, driven by population growth and expanding infrastructure needs, the paints and coatings industry is poised for further expansion. This growth is fueled by the vital role of metal biocides in ensuring paint quality, durability, and resistance to microbial activity.

Regional Insights

Asia Pacific emerged as the dominant player in the Global Metal Biocides Market in 2022, holding the largest market share in terms of value. The proliferating demand for metal biocides is driven by various end-use sectors such as paints & coatings, textiles, food & beverages, and others. This surge in demand has compelled metal biocides manufacturers to ramp up their production capacities. Notably, China's paints & coatings manufacturing sector is experiencing rapid growth, thereby bolstering the performance of the metal biocides market in the region. Moreover, countries like India and Australia are witnessing a significant rise in their building & construction sectors. In

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these industries, metal biocides are employed to combat the growth of harmful pathogens in exterior paints & coatings. For instance, a report published by the India Brands Equity Foundation in March 2022 predicts that India will become the world's third-largest construction market by 2022, further contributing to the demand for metal biocides.

Key Market Players

BASF SE

Clariant AG

Dow Inc.

Milliken Chemical Company

Lonza Group AG

Troy Corporation

SteriTouch Ltd

Noble Biomaterials Inc.

Renaissance Chemicals Ltd

LANXESS AG

Report Scope:

In this report, the Global Metal Biocides Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Metal Biocides Market, By Type:

Zinc

Silver

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Copper & Alloys

Others

Metal Biocides Market, By End User:

Medical

Textile

Wood Preservation

Paints & Coatings

Food & Beverages

Pesticides

Others

Metal Biocides Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

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Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

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Company Profiles: Detailed analysis of the major companies present in the Global Metal Biocides Market.

Available Customizations:

Global Metal Biocides Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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