

Biocides Market by Type (Non-oxidizing Biocide, Oxidizing Biocide), Application (Water Treatment, Household, Industrial & Institutional Cleaning and Home Care, Paints & Coatings, Wood Preservatives), and Region - Global Forecast to 2027

Market Report | 2022-11-08 | 292 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The global biocides market will grow to USD 13.6 Billion by 2027, at a CAGR of 4.3% from USD 11.0 Billion in 2022. Biocides are chemical substances that are used to kill unwanted organisms and control bacteria or fungi growth. Biocides help to prevent degradation of product's physical and sensorial properties. These are primarily used in several applications such as water treatment (municipal water treatment, oil & gas, power plants, pulp & paper, swimming pools, mining, dairy, poultry & food processing), household & personal care, wood preservation, paints & coatings, and others (leathers & textiles). It is also used in domestic applications such as disinfectants and sanitizers, as well as in industrial applications to prevent fouling in water and oil pipelines.

"Oxidizing biocides type is projected to be the second fastest-growing type of biocides market during the forecast period." Oxidizing biocides have the ability to kill microorganisms through electrochemical process of oxidation. In this process, the biocide gains an electron from bacteria, and thereby destroys the bacteria. Oxidizing biocides are the most effective in system that uses a high volume of water. According to industrial experts, oxidizing biocides are mostly used in water treatment process because of its lower cost than non-oxidizing biocides.

"Household, industrial & institutional cleaning and home care application is estimated to be the second largest application in biocides market, in terms of value, in 2021"

The leading suppliers of biocides are increasingly providing their products to the household, industrial & institutional and home care segment on account of their use in preventing the growth of microbes in cleaning and personal care products. Many players

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

manufacture large portions of biocides based on the metallic salts of the pyrrhione molecule. In the personal care industry, meeting the need for biocides is very critical as it requires a higher level of technical expertise on account of it being a regulated industry.

"Europe is estimated to be the second-largest biocides market, in terms of value, in 2021"

Germany is the key market for biocides in the region. The European industrial segment is diversifying, and the complexities are increasing with the changing demand for advanced technologies and products that consume less energy. The environmental regulations are stringent and demand technologies that result in energy savings. The European biocides market is smaller than the North American market on account of stringent regulations such as REACH.

Breakdown of primaries

The study contains insights from various industry experts, ranging from raw material suppliers to Tier 1 companies. The break-up of the primaries is as follows:

- By Company Type: Tier 1 - 46%, Tier 2 - 31%, and Tier 3 - 23%

- By Designation: C-Level - 46%, Director Level - 27%, and Others - 27%

- By Region: North America - 33%, Europe - 27%, APAC - 27%, South America - 7%, Middle East & Africa - 6%,

The key market players profiled in the report include LANXESS AG (Germany), Veolia Group (France), Arxada AG (Switzerland), Ecolab Inc. (US), Nouryon (Netherlands), General Electric Company (US), Evonik Industries AG (Germany), Solvay SA (Belgium), and Clariant AG (Switzerland) and others.

Research Coverage

This report segments the market for biocides is based on type, application, and region, and provides estimations for the overall market size across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, products & services, key strategies, associated with the market for biocides.

Reasons to Buy this Report

This research report is focused on various levels of analysis - industry analysis (industry trends), market share analysis of top players, and company profiles, which together provide an overall view on the competitive landscape; emerging and high-growth segments of the biocides market; high-growth regions; and market drivers, restraints, and opportunities.

The report provides insights on the following pointers:

- Market Penetration: Comprehensive information on biocides offered by top players in the global market

- Market Development: Comprehensive information about lucrative emerging markets - the report analyzes the markets for biocides across regions

- Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global biocides market

- Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the biocides market

Table of Contents:

1	INTRODUCTION	39
1.1	STUDY OBJECTIVES	39
1.2	MARKET DEFINITION	39
1.2.1	BIOCIDES MARKET: INCLUSIONS AND EXCLUSIONS	39
1.2.2	BIOCIDES: MARKET DEFINITION AND INCLUSIONS, BY TYPE	40
1.2.3	BIOCIDES: MARKET DEFINITION AND INCLUSIONS, BY APPLICATION	40
1.3	MARKET SCOPE	41
1.3.1	BIOCIDES MARKET SEGMENTATION	41

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

1.3.2	REGIONS COVERED	41
1.3.3	YEARS CONSIDERED	42
1.4	CURRENCY	42
1.5	UNIT CONSIDERED	42
1.6	STAKEHOLDERS	42
1.7	SUMMARY OF CHANGES	43
2	RESEARCH METHODOLOGY	44
2.1	RESEARCH DATA	44
	FIGURE 1	BIOCIDES MARKET: RESEARCH DESIGN
2.1.1	SECONDARY DATA	44
2.1.2	PRIMARY DATA	45
2.1.2.1	Primary interviews - demand and supply side	45
2.1.2.2	Key industry insights	45
2.1.2.3	Breakdown of primary interviews	46
2.2	MARKET SIZE ESTIMATION	46
2.2.1	BOTTOM-UP APPROACH	47
	FIGURE 2	MARKET SIZE ESTIMATION METHODOLOGY: APPROACH 1 (SUPPLY SIDE): COLLECTIVE SHARE OF MAJOR PLAYERS
	FIGURE 3	MARKET SIZE ESTIMATION METHODOLOGY: APPROACH 1 - BOTTOM-UP (SUPPLY SIDE): COLLECTIVE REVENUE OF ALL PRODUCTS
	FIGURE 4	MARKET SIZE ESTIMATION METHODOLOGY: APPROACH 2 - BOTTOM-UP (DEMAND SIDE): PRODUCTS SOLD AND THEIR AVERAGE SELLING PRICE
2.3	DATA TRIANGULATION	48
	FIGURE 5	BIOCIDES MARKET: DATA TRIANGULATION
2.4	GROWTH RATE ASSUMPTIONS/GROWTH FORECASTS	49
2.4.1	SUPPLY SIDE	50
	FIGURE 6	MARKET CAGR PROJECTIONS FROM SUPPLY SIDE
2.4.2	DEMAND SIDE	50
	FIGURE 7	MARKET GROWTH PROJECTIONS FROM DEMAND-SIDE DRIVERS AND OPPORTUNITIES
	?	
2.5	FACTOR ANALYSIS	51
2.6	ASSUMPTIONS	51
2.7	LIMITATIONS	52
2.8	RISK ASSESSMENT	52
	TABLE 1	BIOCIDES MARKET: RISK ASSESSMENT
3	EXECUTIVE SUMMARY	53
	FIGURE 8	NON-OXIDIZING BIOCIDES TO LEAD BIOCIDES MARKET IN 2021
	FIGURE 9	WATER TREATMENT TO BE FASTEST-GROWING APPLICATION OF BIOCIDES DURING FORECAST PERIOD
	FIGURE 10	NORTH AMERICA ACCOUNTED FOR LARGEST MARKET SHARE IN 2021
4	PREMIUM INSIGHTS	56
4.1	SIGNIFICANT OPPORTUNITIES IN BIOCIDES MARKET	56
	FIGURE 11	WATER TREATMENT TO DRIVE BIOCIDES MARKET DURING FORECAST PERIOD
4.2	BIOCIDES MARKET SIZE, BY REGION	56
	FIGURE 12	NORTH AMERICA TO BE LARGEST BIOCIDES MARKET DURING FORECAST PERIOD
4.3	ASIA PACIFIC: BIOCIDES MARKET, BY APPLICATION AND COUNTRY, 2021	57
	FIGURE 13	CHINA ACCOUNTED FOR LARGEST MARKET SHARE IN 2021
4.4	BIOCIDES MARKET SIZE, BY TYPE AND REGION	57
	FIGURE 14	NON-OXIDIZING BIOCIDES DOMINATED BIOCIDES MARKET ACROSS REGIONS

4.5	BIOCIDES MARKET ATTRACTIVENESS	58
FIGURE 15	INDIA TO BE FASTEST-GROWING BIOCIDES MARKET DURING FORECAST PERIOD	58
5	MARKET OVERVIEW	59
5.1	INTRODUCTION	59
5.2	MARKET DYNAMICS	59
FIGURE 16	OVERVIEW OF FACTORS GOVERNING BIOCIDES MARKET	59
5.2.1	DRIVERS	60
5.2.1.1	Increase in antimicrobial protection in end-use industries	60
TABLE 2	GLOBAL OIL PRODUCTION, 2021 (MILLION TONS)	60
5.2.1.2	Stringent regulatory environment	60
5.2.1.3	Government focus on consumption of clean water	61
5.2.2	RESTRAINTS	61
5.2.2.1	Lengthy and expensive registration process	61
TABLE 3	FEEES PAYABLE TO EUROPEAN CHEMICAL AGENCY CONCERNING USE AND MARKETING OF BIOCIDAL PRODUCTS IN EUROPEAN UNION	62
5.2.2.2	Environmental regulations on toxic biocides	62
5.2.3	OPPORTUNITIES	63
5.2.3.1	Rising demand for green biocides	63
5.2.3.2	Emerging applications of biocidal products	63
5.2.4	CHALLENGES	63
5.2.4.1	Fluctuating raw material prices	63
5.3	PORTER'S FIVE FORCES ANALYSIS	64
FIGURE 17	BIOCIDES MARKET: PORTER'S FIVE FORCES ANALYSIS	64
5.3.1	THREAT OF NEW ENTRANTS	65
5.3.2	THREAT OF SUBSTITUTES	65
5.3.3	BARGAINING POWER OF SUPPLIERS	65
5.3.4	BARGAINING POWER OF BUYERS	66
5.3.5	INTENSITY OF COMPETITIVE RIVALRY	66
TABLE 4	BIOCIDES MARKET: PORTER'S FIVE FORCES ANALYSIS	66
5.4	KEY STAKEHOLDERS & BUYING CRITERIA	67
5.4.1	KEY STAKEHOLDERS IN BUYING PROCESS	67
FIGURE 18	INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR TOP 3 APPLICATIONS	67
TABLE 5	INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR TOP 3 APPLICATIONS (%)	67
5.4.2	BUYING CRITERIA	67
FIGURE 19	KEY BUYING CRITERIA FOR TOP 3 APPLICATIONS	68
TABLE 6	KEY BUYING CRITERIA FOR TOP 3 APPLICATIONS	68
5.5	MACROECONOMIC INDICATORS	68
5.5.1	GDP TRENDS AND FORECAST FOR MAJOR ECONOMIES	69
TABLE 7	GDP TRENDS AND FORECASTS OF MAJOR ECONOMIES, 2019-2027 (USD BILLION)	69
6	INDUSTRY TRENDS	70
6.1	SUPPLY CHAIN ANALYSIS	70
FIGURE 20	BIOCIDES MARKET: SUPPLY CHAIN	70
6.1.1	RAW MATERIAL	70
6.1.2	BIOCIDE MANUFACTURER	70
6.1.3	DISTRIBUTION NETWORK	71
6.1.4	END-USER INDUSTRY	71
6.2	BIOCIDES MARKET: REALISTIC, PESSIMISTIC, OPTIMISTIC, AND NON-COVID-19 SCENARIOS	71

FIGURE 21□MARKET SIZE UNDER REALISTIC, PESSIMISTIC, OPTIMISTIC, AND NON-COVID-19 SCENARIOS□71

TABLE 8□BIOCIDES MARKET FORECAST SCENARIO, 2019-2027 (USD MILLION)□71

6.2.1□NON-COVID-19 SCENARIO□72

6.2.2□OPTIMISTIC SCENARIO□72

6.2.3□PESSIMISTIC SCENARIO□72

6.2.4□REALISTIC SCENARIO□72

6.3□PRICING ANALYSIS□72

6.3.1□AVERAGE SELLING PRICE OF KEY PLAYERS, BY APPLICATION□72

FIGURE 22□AVERAGE SELLING PRICE OF KEY PLAYERS FOR TOP THREE APPLICATIONS□72

TABLE 9□AVERAGE SELLING PRICE OF KEY PLAYERS FOR TOP THREE APPLICATIONS, USD/KG□73

6.3.2□AVERAGE SELLING PRICE, BY REGION□73

FIGURE 23□AVERAGE SELLING PRICE OF BIOCIDES, BY REGION, USD/KG□73

TABLE 10□AVERAGE SELLING PRICE OF BIOCIDES, BY REGION, USD/KG□74

6.4□TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES□74

6.4.1□REVENUE SHIFTS & REVENUE POCKETS FOR BIOCIDES MARKET□74

FIGURE 24□REVENUE SHIFT FOR BIOCIDES MARKET□74

6.5□CONNECTED MARKETS: ECOSYSTEM□75

TABLE 11□BIOCIDES MARKET: ECOSYSTEM□75

FIGURE 25□BIOCIDES: ECOSYSTEM□76

6.6□TECHNOLOGY ANALYSIS□77

6.6.1□AQUEOUS PROCESS□77

6.6.2□KEMIRA KEMCONNECT DEX TECHNOLOGY□77

6.6.3□THOR AMME (ADVANCED MICRO MATRIX EMBEDDING) TECHNOLOGY□77

6.7□CASE STUDY ANALYSIS□78

6.7.1□CASE STUDY ON VEOLIA GROUP□78

TABLE 12□BENEFITS OF OSG HYDREX□78

6.7.2□CASE STUDY ON ECOLAB INC.□78

6.8□TRADE DATA STATISTICS□79

6.8.1□IMPORT SCENARIO OF BIOCIDES□79

FIGURE 26□IMPORT OF BIOCIDES, BY KEY COUNTRIES (2016-2021)□79

TABLE 13□IMPORT OF BIOCIDES, BY REGION, 2016-2021 (USD MILLION)□80

6.8.2□EXPORT SCENARIO OF BIOCIDES□80

FIGURE 27□EXPORT OF BIOCIDES, BY KEY COUNTRIES (2016-2021)□80

TABLE 14□EXPORT OF BIOCIDES, BY REGION, 2016-2021 (USD MILLION)□80

6.9□REGULATORY LANDSCAPE□81

6.9.1□REGULATIONS RELATED TO BIOCIDES□81

6.10□KEY CONFERENCES & EVENTS IN 2022-2023□82

TABLE 15□BIOCIDES MARKET: DETAILED LIST OF CONFERENCES & EVENTS□82

6.11□PATENT ANALYSIS□82

6.11.1□APPROACH□82

6.11.2□DOCUMENT TYPE□83

TABLE 16□GRANTED PATENTS ACCOUNTED FOR 39% OF TOTAL COUNT□83

FIGURE 28□LIST OF BIOCID PATENTS□83

FIGURE 29□PATENT PUBLICATION TRENDS FOR BIOCIDES MARKET, 2011-2021□83

FIGURE 30□LEGAL STATUS OF PATENTS□84

6.11.3□JURISDICTION ANALYSIS□84

FIGURE 31□MAXIMUM PATENTS FILED BY COMPANIES IN US□84

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.11.4 TOP APPLICANTS 85

FIGURE 32 ECOLAB INC. REGISTERED MAXIMUM NUMBER OF PATENTS BETWEEN 2011 AND 2021 85

TABLE 17 RECENT PATENTS BY ECOLAB INC. 85

TABLE 18 RECENT PATENTS BY DOW INC. 86

TABLE 19 RECENT PATENTS BY COGNIS GROUP, INC. 86

TABLE 20 TOP 10 PATENT OWNERS IN US, 2011-2021 87

7 BIOCIDES MARKET, BY TYPE 88

7.1 INTRODUCTION 89

TABLE 21 TYPES OF BIOCIDES USED IN INDUSTRIAL APPLICATIONS 89

FIGURE 33 NON-OXIDIZING BIOCIDES TO ACCOUNT FOR LARGEST SHARE DURING FORECAST PERIOD 91

TABLE 22 BIOCIDES MARKET SIZE, BY TYPE, 2017-2020 (KILOTON) 91

TABLE 23 BIOCIDES MARKET SIZE, BY TYPE, 2021-2027 (KILOTON) 92

TABLE 24 BIOCIDES MARKET SIZE, BY TYPE, 2017-2020 (USD MILLION) 92

TABLE 25 BIOCIDES MARKET SIZE, BY TYPE, 2021-2027 (USD MILLION) 92

7.2 OXIDIZING BIOCIDES 93

7.2.1 GROWING DEMAND FOR TREATED MUNICIPAL WATER DUE TO POPULATION GROWTH 93

TABLE 26 OXIDIZING BIOCIDES MARKET SIZE, BY REGION, 2017-2020 (KILOTON) 93

TABLE 27 OXIDIZING BIOCIDES MARKET SIZE, BY REGION, 2021-2027 (KILOTON) 93

TABLE 28 OXIDIZING BIOCIDES MARKET SIZE, BY REGION, 2017-2020 (USD MILLION) 94

TABLE 29 OXIDIZING BIOCIDES MARKET SIZE, BY REGION, 2021-2027 (USD MILLION) 94

7.3 NON-OXIDIZING BIOCIDES 95

7.3.1 EXTENSIVE USE IN OIL & GAS PRODUCTION 95

TABLE 30 ADVANTAGES AND DISADVANTAGES OF NON-OXIDIZING BIOCIDES 95

TABLE 31 NON-OXIDIZING BIOCIDES MARKET SIZE, BY REGION, 2017-2020 (KILOTON) 95

TABLE 32 NON-OXIDIZING BIOCIDES MARKET SIZE, BY REGION, 2021-2027 (KILOTON) 96

TABLE 33 NON-OXIDIZING BIOCIDES MARKET SIZE, BY REGION, 2017-2020 (USD MILLION) 96

TABLE 34 NON-OXIDIZING BIOCIDES MARKET SIZE, BY REGION, 2021-2027 (USD MILLION) 96

7.4 OTHER BIOCIDES 97

TABLE 35 OTHERS MARKET SIZE, BY REGION, 2017-2020 (KILOTON) 97

TABLE 36 OTHERS MARKET, BY REGION, 2021-2027 (KILOTON) 98

TABLE 37 OTHERS MARKET SIZE, BY REGION, 2017-2020 (USD MILLION) 98

TABLE 38 OTHERS MARKET SIZE, BY REGION, 2021-2027 (USD MILLION) 98

8 BIOCIDES MARKET, BY APPLICATION 99

8.1 INTRODUCTION 100

FIGURE 34 WATER TREATMENT APPLICATION TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD 100

TABLE 39 BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON) 101

TABLE 40 BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON) 101

TABLE 41 BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION) 102

TABLE 42 BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION) 102

8.2 WATER TREATMENT 103

FIGURE 35 MUNICIPAL WATER TREATMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD 103

TABLE 43 BIOCIDES MARKET SIZE IN WATER TREATMENT, BY REGION, 2017-2020 (KILOTON) 103

TABLE 44 BIOCIDES MARKET SIZE IN WATER TREATMENT, BY REGION, 2021-2027 (KILOTON) 104

TABLE 45 BIOCIDES MARKET SIZE IN WATER TREATMENT, BY REGION, 2017-2020 (USD MILLION) 104

TABLE 46 BIOCIDES MARKET SIZE IN WATER TREATMENT, BY REGION, 2021-2027 (USD MILLION) 104

8.2.1 MUNICIPAL WATER TREATMENT 105

8.2.1.1 Growing population, limited freshwater resources, and increasing water scarcity 105

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 47	BIOCIDES MARKET SIZE IN MUNICIPAL WATER TREATMENT, BY REGION, 2017-2020 (KILOTON)	105
TABLE 48	BIOCIDES MARKET SIZE IN MUNICIPAL WATER TREATMENT, BY REGION, 2021-2027 (KILOTON)	105
TABLE 49	BIOCIDES MARKET SIZE IN MUNICIPAL WATER TREATMENT, BY REGION, 2017-2020 (USD MILLION)	106
TABLE 50	BIOCIDES MARKET SIZE IN MUNICIPAL WATER TREATMENT, BY REGION, 2021-2027 (USD MILLION)	106
8.2.2 OIL & GAS 106		
8.2.2.1 Need for microbial control for operational efficiency 106		
TABLE 51	BIOCIDES MARKET SIZE IN OIL & GAS WATER TREATMENT, BY REGION, 2017-2020 (KILOTON)	107
TABLE 52	BIOCIDES MARKET SIZE IN OIL & GAS WATER TREATMENT, BY REGION, 2021-2027 (KILOTON)	107
TABLE 53	BIOCIDES MARKET SIZE IN OIL & GAS WATER TREATMENT, BY REGION, 2017-2020 (USD MILLION)	108
TABLE 54	BIOCIDES MARKET SIZE IN OIL & GAS WATER TREATMENT, BY REGION, 2021-2027 (USD MILLION)	108
8.2.3 POWER PLANTS 108		
8.2.3.1 Growth in power generation industry 108		
TABLE 55	BIOCIDES MARKET SIZE IN POWER PLANTS WATER TREATMENT, BY REGION, 2017-2020 (KILOTON)	109
TABLE 56	BIOCIDES MARKET SIZE IN POWER PLANTS WATER TREATMENT, BY REGION, 2021-2027 (KILOTON)	109
TABLE 57	BIOCIDES MARKET SIZE IN POWER PLANTS WATER TREATMENT, BY REGION, 2017-2020 (USD MILLION)	110
TABLE 58	BIOCIDES MARKET SIZE IN POWER PLANTS WATER TREATMENT, BY REGION, 2021-2027 (USD MILLION)	110
8.2.4 PULP & PAPER 110		
8.2.4.1 Increasing use in process water for pulp & paper applications 110		
TABLE 59	BIOCIDES MARKET SIZE IN PULP & PAPER WATER TREATMENT, BY REGION, 2017-2020 (KILOTON)	111
TABLE 60	BIOCIDES MARKET SIZE IN PULP & PAPER WATER TREATMENT, BY REGION, 2021-2027 (KILOTON)	111
TABLE 61	BIOCIDES MARKET SIZE IN PULP & PAPER WATER TREATMENT, BY REGION, 2017-2020 (USD MILLION)	111
TABLE 62	BIOCIDES MARKET SIZE IN PULP & PAPER WATER TREATMENT, BY REGION, 2021-2027 (USD MILLION)	112
8.2.5 SWIMMING POOLS 112		
8.2.5.1 Regular use of chlorine for swimming pool water treatment 112		
TABLE 63	BIOCIDES MARKET SIZE IN SWIMMING POOLS WATER TREATMENT, BY REGION, 2017-2020 (KILOTON)	112
TABLE 64	BIOCIDES MARKET SIZE IN SWIMMING POOLS WATER TREATMENT, BY REGION, 2021-2027 (KILOTON)	113
TABLE 65	BIOCIDES MARKET SIZE IN SWIMMING POOL WATER TREATMENT, BY REGION, 2017-2020 (USD MILLION)	113
TABLE 66	BIOCIDES MARKET SIZE IN SWIMMING POOL WATER TREATMENT, BY REGION, 2021-2027 (USD MILLION)	113
8.2.6 MINING 114		
8.2.6.1 Extensive use in water-intensive mining applications 114		
TABLE 67	BIOCIDES MARKET SIZE IN MINING WATER TREATMENT, BY REGION, 2017-2020 (KILOTON)	114
TABLE 68	BIOCIDES MARKET SIZE IN MINING WATER TREATMENT, BY REGION, 2021-2027 (KILOTON)	114
TABLE 69	BIOCIDES MARKET SIZE IN MINING WATER TREATMENT, BY REGION, 2017-2020 (USD MILLION)	115
TABLE 70	BIOCIDES MARKET SIZE IN MINING WATER TREATMENT, BY REGION, 2021-2027 (USD MILLION)	115
8.2.7 OTHER WATER TREATMENT APPLICATIONS 115		
TABLE 71	BIOCIDES MARKET SIZE IN OTHER WATER TREATMENT APPLICATIONS, BY REGION, 2017-2020 (KILOTON)	116
TABLE 72	BIOCIDES MARKET SIZE IN OTHER WATER TREATMENT APPLICATIONS, BY REGION, 2021-2027 (KILOTON)	116
TABLE 73	BIOCIDES MARKET SIZE IN OTHER WATER TREATMENT APPLICATIONS, BY REGION, 2017-2020 (USD MILLION)	116
TABLE 74	BIOCIDES MARKET SIZE IN OTHER WATER TREATMENT APPLICATIONS, BY REGION, 2021-2027 (USD MILLION)	117
8.3 HOUSEHOLD, INDUSTRIAL & INSTITUTIONAL CLEANING, AND HOME CARE 117		
8.3.1 EXTENSIVE USE OF TRICLOSAN & BENZALKONIUM CHLORIDE AND OTHER BIOCIDES 117		
TABLE 75	BIOCIDES MARKET SIZE IN HOUSEHOLD, INDUSTRIAL & INSTITUTIONAL CLEANING, AND HOME CARE, BY REGION, 2017-2020 (KILOTON)	117
TABLE 76	BIOCIDES MARKET SIZE IN HOUSEHOLD, INDUSTRIAL & INSTITUTIONAL CLEANING, AND HOME CARE, BY REGION, 2021-2027 (KILOTON)	118
TABLE 77	BIOCIDES MARKET SIZE IN HOUSEHOLD, INDUSTRIAL & INSTITUTIONAL CLEANING, AND HOME CARE, BY REGION, 2017-2020 (USD MILLION)	118

TABLE 78	BIOCIDES MARKET SIZE IN HOUSEHOLD, INDUSTRIAL & INSTITUTIONAL CLEANING, AND HOME CARE, BY REGION, 2021-2027 (USD MILLION)	119
8.4	WOOD PRESERVATIVES	119
8.4.1	RAPID GROWTH DUE TO RISE IN CONSTRUCTION INDUSTRY	119
TABLE 79	BIOCIDES MARKET SIZE IN WOOD PRESERVATIVES, BY REGION, 2017-2020 (KILOTON)	119
TABLE 80	BIOCIDES MARKET SIZE IN WOOD PRESERVATIVES, BY REGION, 2021-2027 (KILOTON)	120
TABLE 81	BIOCIDES MARKET SIZE IN WOOD PRESERVATIVES, BY REGION, 2017-2020 (USD MILLION)	120
TABLE 82	BIOCIDES MARKET SIZE IN WOOD PRESERVATIVES, BY REGION, 2021-2027 (USD MILLION)	120
8.5	PAINTS & COATINGS	121
8.5.1	MARINE COATINGS TO GROW DUE TO VARIOUS MERGERS AND UPCOMING PROJECTS IN THE SHIPBUILDING INDUSTRY	121
TABLE 83	BIOCIDES MARKET SIZE IN PAINTS & COATINGS, BY REGION, 2017-2020 (KILOTON)	121
TABLE 84	BIOCIDES MARKET SIZE IN PAINTS & COATINGS, BY REGION, 2021-2027 (KILOTON)	121
TABLE 85	BIOCIDES MARKET SIZE IN PAINTS & COATINGS, BY REGION, 2017-2020 (USD MILLION)	122
TABLE 86	BIOCIDES MARKET SIZE IN PAINTS & COATINGS, BY REGION, 2021-2027 (USD MILLION)	122
8.5.2	MARINE COATINGS	122
8.5.2.1	Mergers and upcoming projects in shipbuilding industry	122
8.5.3	OTHER PAINTS & COATINGS	123
8.6	OTHERS	123
TABLE 87	BIOCIDES MARKET SIZE IN OTHER APPLICATIONS, BY REGION, 2017-2020 (KILOTON)	123
TABLE 88	BIOCIDES MARKET SIZE IN OTHER APPLICATIONS, BY REGION, 2021-2027 (KILOTON)	123
TABLE 89	BIOCIDES MARKET SIZE IN OTHER APPLICATIONS, BY REGION, 2017-2020 (USD MILLION)	124
TABLE 90	BIOCIDES MARKET SIZE IN OTHER APPLICATIONS, BY REGION, 2021-2027 (USD MILLION)	124
9	BIOCIDES MARKET, BY REGION	125
9.1	INTRODUCTION	126
FIGURE 36	NORTH AMERICA TO BE FASTEST-GROWING BIOCIDES MARKET BETWEEN 2022 AND 2027	126
TABLE 91	BIOCIDES MARKET SIZE, BY REGION, 2017-2020 (USD MILLION)	126
TABLE 92	BIOCIDES MARKET SIZE, BY REGION, 2021-2027 (USD MILLION)	127
TABLE 93	BIOCIDES MARKET SIZE, BY REGION, 2017-2020 (KILOTON)	127
TABLE 94	BIOCIDES MARKET SIZE, BY REGION, 2021-2027 (KILOTON)	127
9.2	NORTH AMERICA	128
FIGURE 37	NORTH AMERICA MARKET SNAPSHOT: US ACCOUNTED FOR LARGEST MARKET SHARE IN 2021	128
9.2.1	NORTH AMERICA BIOCIDES MARKET, BY TYPE	129
TABLE 95	NORTH AMERICA: BIOCIDES MARKET SIZE, BY TYPE, 2017-2020 (KILOTON)	129
TABLE 96	NORTH AMERICA: BIOCIDES MARKET SIZE, BY TYPE, 2021-2027 (KILOTON)	129
TABLE 97	NORTH AMERICA: BIOCIDES MARKET SIZE, BY TYPE, 2017-2020 (USD MILLION)	129
TABLE 98	NORTH AMERICA: BIOCIDES MARKET SIZE, BY TYPE, 2021-2027 (USD MILLION)	129
9.2.2	NORTH AMERICA BIOCIDES MARKET, BY APPLICATION	130
TABLE 99	NORTH AMERICA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	130
TABLE 100	NORTH AMERICA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	130
TABLE 101	NORTH AMERICA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	131
TABLE 102	NORTH AMERICA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	132
9.2.3	NORTH AMERICA BIOCIDES MARKET, BY COUNTRY	132
TABLE 103	NORTH AMERICA: BIOCIDES MARKET SIZE, BY COUNTRY, 2017-2020 (KILOTON)	132
TABLE 104	NORTH AMERICA: BIOCIDES MARKET SIZE, BY COUNTRY, 2021-2027 (KILOTON)	132
TABLE 105	NORTH AMERICA: BIOCIDES MARKET SIZE, BY COUNTRY, 2017-2020 (USD MILLION)	133
TABLE 106	NORTH AMERICA: BIOCIDES MARKET SIZE, BY COUNTRY, 2021-2027 (USD MILLION)	133
9.2.3.1	US	133

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

9.2.3.1.1	Growing use of biocides in automotive and construction industries	133
TABLE 107	US: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	134
TABLE 108	US: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	134
TABLE 109	US: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	135
TABLE 110	US: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	135
9.2.3.2	Canada	136
9.2.3.2.1	Widespread use in municipal water treatment and paper & pulp industries	136
TABLE 111	CANADA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	136
TABLE 112	CANADA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	137
TABLE 113	CANADA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	138
TABLE 114	CANADA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	138
9.2.3.3	Mexico	139
9.2.3.3.1	Increased construction activities	139
TABLE 115	MEXICO: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	139
TABLE 116	MEXICO: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	140
TABLE 117	MEXICO: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	141
TABLE 118	MEXICO: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	141
9.3	EUROPE	142
FIGURE 38	EUROPE MARKET SNAPSHOT: GERMANY ACCOUNTED FOR LARGEST MARKET SHARE IN 2021	142
9.3.1	EUROPE BIOCIDES MARKET, BY TYPE	143
TABLE 119	EUROPE: BIOCIDES MARKET SIZE, BY TYPE, 2017-2020 (KILOTON)	143
TABLE 120	EUROPE: BIOCIDES MARKET SIZE, BY TYPE, 2021-2027 (KILOTON)	143
TABLE 121	EUROPE: BIOCIDES MARKET SIZE, BY TYPE, 2017-2020 (USD MILLION)	143
TABLE 122	EUROPE: BIOCIDES MARKET SIZE, BY TYPE, 2021-2027 (USD MILLION)	143
9.3.2	EUROPE BIOCIDES MARKET, BY APPLICATION	144
TABLE 123	EUROPE: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	144
TABLE 124	EUROPE: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	144
TABLE 125	EUROPE: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	145
TABLE 126	EUROPE: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	145
9.3.3	EUROPE BIOCIDES MARKET, BY COUNTRY	146
TABLE 127	EUROPE: BIOCIDES MARKET SIZE, BY COUNTRY, 2017-2020 (KILOTON)	146
TABLE 128	EUROPE: BIOCIDES MARKET SIZE, BY COUNTRY, 2021-2027 (KILOTON)	146
TABLE 129	EUROPE: BIOCIDES MARKET SIZE, BY COUNTRY, 2017-2020 (USD MILLION)	147
TABLE 130	EUROPE: BIOCIDES MARKET SIZE, BY COUNTRY, 2021-2027 (USD MILLION)	147
9.3.3.1	Russia	147
9.3.3.1.1	Oil & gas water treatment application	147
TABLE 131	RUSSIA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	148
TABLE 132	RUSSIA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	148
TABLE 133	RUSSIA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	149
TABLE 134	RUSSIA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	150
9.3.3.2	Germany	150
9.3.3.2.1	Increased demand for environmentally friendly biocides to drive non-oxidizing biocides segment	150
TABLE 135	GERMANY: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	151
TABLE 136	GERMANY: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	151
TABLE 137	GERMANY: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	152
TABLE 138	GERMANY: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	153
9.3.3.3	France	153

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

9.3.3.3.1 Investments by personal care giants 153

TABLE 139 FRANCE: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON) 154

TABLE 140 FRANCE: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON) 154

TABLE 141 FRANCE: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION) 155

TABLE 142 FRANCE: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION) 156

9.3.3.4 Italy 156

9.3.3.4.1 Expansion in FDI to lead industrialization 156

TABLE 143 ITALY: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON) 157

TABLE 144 ITALY: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON) 157

TABLE 145 ITALY: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION) 158

TABLE 146 ITALY: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION) 159

9.3.3.5 UK 159

9.3.3.5.1 Beauty industry to drive market 159

TABLE 147 UK: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON) 160

TABLE 148 UK: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON) 160

TABLE 149 UK: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION) 161

TABLE 150 UK: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION) 162

9.4 ASIA PACIFIC 163

FIGURE 39 ASIA PACIFIC MARKET SNAPSHOT: CHINA ACCOUNTED FOR LARGEST MARKET SHARE IN 2021 163

9.4.1 ASIA PACIFIC BIOCIDES MARKET, BY TYPE 164

TABLE 151 ASIA PACIFIC: BIOCIDES MARKET SIZE, BY TYPE, 2017-2020 (KILOTON) 164

TABLE 152 ASIA PACIFIC: BIOCIDES MARKET SIZE, BY TYPE, 2021-2027 (KILOTON) 164

TABLE 153 ASIA PACIFIC: BIOCIDES MARKET SIZE, BY TYPE, 2017-2020 (USD MILLION) 164

TABLE 154 ASIA PACIFIC: BIOCIDES MARKET SIZE, BY TYPE, 2021-2027 (USD MILLION) 165

9.4.2 ASIA PACIFIC BIOCIDES MARKET, BY APPLICATION 165

TABLE 155 ASIA PACIFIC: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON) 165

TABLE 156 ASIA PACIFIC: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON) 166

TABLE 157 ASIA PACIFIC: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION) 167

TABLE 158 ASIA PACIFIC: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION) 167

9.4.3 ASIA PACIFIC BIOCIDES MARKET, BY COUNTRY 168

TABLE 159 ASIA PACIFIC: BIOCIDES MARKET SIZE, BY COUNTRY, 2017-2020 (KILOTON) 168

TABLE 160 ASIA PACIFIC: BIOCIDES MARKET SIZE, BY COUNTRY, 2021-2027 (KILOTON) 168

TABLE 161 ASIA PACIFIC: BIOCIDES MARKET SIZE, BY COUNTRY, 2017-2020 (USD MILLION) 169

TABLE 162 ASIA PACIFIC: BIOCIDES MARKET SIZE, BY COUNTRY, 2021-2027 (USD MILLION) 169

9.4.3.1 China 169

9.4.3.1.1 Rising demand from water treatment applications 169

TABLE 163 CHINA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON) 170

TABLE 164 CHINA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON) 170

TABLE 165 CHINA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION) 171

TABLE 166 CHINA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION) 171

9.4.3.2 Japan 172

9.4.3.2.1 Infrastructure, shipbuilding, and automotive sectors 172

TABLE 167 JAPAN: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON) 172

TABLE 168 JAPAN: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON) 173

TABLE 169 JAPAN: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION) 174

TABLE 170 JAPAN: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION) 174

9.4.3.3 India 175

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

9.4.3.3.1	Increased demand for clean drinking water and hygiene products	175
TABLE 171	INDIA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	175
TABLE 172	INDIA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	176
TABLE 173	INDIA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	177
TABLE 174	INDIA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	177
9.4.3.4	South Korea	178
9.4.3.4.1	Presence of technologically advanced vehicle manufacturers	178
TABLE 175	SOUTH KOREA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	178
TABLE 176	SOUTH KOREA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	179
TABLE 177	SOUTH KOREA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	180
TABLE 178	SOUTH KOREA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	180
9.4.3.5	Indonesia	181
9.4.3.5.1	Increasing FDI in manufacturing industry	181
TABLE 179	INDONESIA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	181
TABLE 180	INDONESIA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	182
TABLE 181	INDONESIA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	183
TABLE 182	INDONESIA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	183
9.4.3.6	Australia & New Zealand	184
9.4.3.6.1	Use in water treatment and wood preservative applications	184
TABLE 183	AUSTRALIA & NEW ZEALAND: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	184
TABLE 184	AUSTRALIA & NEW ZEALAND: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	185
TABLE 185	AUSTRALIA & NEW ZEALAND: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	186
TABLE 186	AUSTRALIA & NEW ZEALAND: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	186
9.5	MIDDLE EAST & AFRICA	187
9.5.1	MIDDLE EAST & AFRICA BIOCIDES MARKET, BY TYPE	187
TABLE 187	MIDDLE EAST & AFRICA: BIOCIDES MARKET SIZE, BY TYPE, 2017-2020 (KILOTON)	187
TABLE 188	MIDDLE EAST & AFRICA: BIOCIDES MARKET SIZE, BY TYPE, 2021-2027 (KILOTON)	187
TABLE 189	MIDDLE EAST & AFRICA: BIOCIDES MARKET SIZE, BY TYPE, 2017-2020 (USD MILLION)	187
TABLE 190	MIDDLE EAST & AFRICA: BIOCIDES MARKET SIZE, BY TYPE, 2021-2027 (USD MILLION)	188
9.5.2	MIDDLE EAST & AFRICA BIOCIDES MARKET, BY APPLICATION	188
TABLE 191	MIDDLE EAST & AFRICA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	188
TABLE 192	MIDDLE EAST & AFRICA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	189
TABLE 193	MIDDLE EAST & AFRICA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	190
TABLE 194	MIDDLE EAST & AFRICA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	190
9.5.3	MIDDLE EAST & AFRICA BIOCIDES MARKET, BY COUNTRY	191
TABLE 195	MIDDLE EAST & AFRICA: BIOCIDES MARKET SIZE, BY COUNTRY, 2017-2020 (KILOTON)	191
TABLE 196	MIDDLE EAST & AFRICA: BIOCIDES MARKET SIZE, BY COUNTRY, 2021-2027 (KILOTON)	191
TABLE 197	MIDDLE EAST & AFRICA: BIOCIDES MARKET SIZE, BY COUNTRY, 2017-2020 (USD MILLION)	191
TABLE 198	MIDDLE EAST & AFRICA: BIOCIDES MARKET SIZE, BY COUNTRY, 2021-2027 (USD MILLION)	192
9.5.3.1	Saudi Arabia	192
9.5.3.1.1	High consumption of biocides in oil & gas sector	192
TABLE 199	SAUDI ARABIA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	192
TABLE 200	SAUDI ARABIA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	193
TABLE 201	SAUDI ARABIA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	193
TABLE 202	SAUDI ARABIA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	194
9.5.3.2	Iran	194

9.5.3.2.1	Demand for biocides for water treatment in mining industry	194
TABLE 203	IRAN: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	195
TABLE 204	IRAN: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	195
TABLE 205	IRAN: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	196
TABLE 206	IRAN: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	196
9.5.3.3	South Africa	197
9.5.3.3.1	Large number of automotive plants	197
TABLE 207	SOUTH AFRICA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	197
TABLE 208	SOUTH AFRICA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	198
TABLE 209	SOUTH AFRICA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	199
TABLE 210	SOUTH AFRICA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	199
9.5.3.4	UAE	200
9.5.3.4.1	Construction industry to drive demand for wood preservatives and paints & coatings	200
TABLE 211	UAE: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	200
TABLE 212	UAE: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	201
TABLE 213	UAE: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	201
TABLE 214	UAE: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	202
9.6	SOUTH AMERICA	202
9.6.1	SOUTH AMERICA BIOCIDES MARKET, BY TYPE	202
TABLE 215	SOUTH AMERICA: BIOCIDES MARKET SIZE, BY TYPE, 2017-2020 (KILOTON)	202
TABLE 216	SOUTH AMERICA: BIOCIDES MARKET SIZE, BY TYPE, 2021-2027 (KILOTON)	203
TABLE 217	SOUTH AMERICA: BIOCIDES MARKET SIZE, BY TYPE, 2017-2020 (USD MILLION)	203
TABLE 218	SOUTH AMERICA: BIOCIDES MARKET SIZE, BY TYPE, 2021-2027 (USD MILLION)	203
9.6.2	SOUTH AMERICA BIOCIDES MARKET, BY APPLICATION	204
TABLE 219	SOUTH AMERICA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	204
TABLE 220	SOUTH AMERICA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	204
TABLE 221	SOUTH AMERICA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	205
TABLE 222	SOUTH AMERICA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	206
9.6.3	SOUTH AMERICA BIOCIDES MARKET, BY COUNTRY	206
TABLE 223	SOUTH AMERICA: BIOCIDES MARKET SIZE, BY COUNTRY, 2017-2020 (KILOTON)	206
TABLE 224	SOUTH AMERICA: BIOCIDES MARKET SIZE, BY COUNTRY, 2021-2027 (KILOTON)	206
TABLE 225	SOUTH AMERICA: BIOCIDES MARKET SIZE, BY COUNTRY, 2017-2020 (USD MILLION)	207
TABLE 226	SOUTH AMERICA: BIOCIDES MARKET SIZE, BY COUNTRY, 2021-2027 (USD MILLION)	207
9.6.3.1	Brazil	207
9.6.3.1.1	Extensive use of biocides in construction industry	207
TABLE 227	BRAZIL: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	208
TABLE 228	BRAZIL: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	208
TABLE 229	BRAZIL: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	209
TABLE 230	BRAZIL: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	209
9.6.3.2	Argentina	210
9.6.3.2.1	Increasing demand for household & personal care products	210
TABLE 231	ARGENTINA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (KILOTON)	210
TABLE 232	ARGENTINA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (KILOTON)	211
TABLE 233	ARGENTINA: BIOCIDES MARKET SIZE, BY APPLICATION, 2017-2020 (USD MILLION)	212
TABLE 234	ARGENTINA: BIOCIDES MARKET SIZE, BY APPLICATION, 2021-2027 (USD MILLION)	212
10	COMPETITIVE LANDSCAPE	213
10.1	INTRODUCTION	213

10.2	STRATEGIES ADOPTED BY KEY PLAYERS	213
10.2.1	OVERVIEW OF STRATEGIES ADOPTED BY KEY MANUFACTURERS	213
10.3	MARKET SHARE ANALYSIS	215
10.3.1	RANKING OF KEY MARKET PLAYERS, 2021	215
	FIGURE 40 RANKING OF TOP FIVE PLAYERS IN BIOCIDES MARKET, 2021	215
10.3.2	MARKET SHARE OF KEY PLAYERS	215
	TABLE 235 BIOCIDES MARKET: DEGREE OF COMPETITION	216
	FIGURE 41 LANXESS AG LED BIOCIDES MARKET IN 2021	216
10.3.2.1	LANXESS AG	216
10.3.2.2	Arxada AG	216
10.3.2.3	Veolia Group	217
10.3.2.4	Ecolab Inc.	217
10.3.2.5	Nouryon	217
10.3.3	REVENUE ANALYSIS OF TOP FIVE PLAYERS	217
	FIGURE 42 REVENUE ANALYSIS OF KEY COMPANIES IN LAST FIVE YEARS	217
10.4	COMPANY PRODUCT FOOTPRINT ANALYSIS	218
	FIGURE 43 BIOCIDES MARKET: COMPANY FOOTPRINT	218
	TABLE 236 BIOCIDES MARKET: TYPE FOOTPRINT	219
	TABLE 237 BIOCIDES MARKET: END-USE INDUSTRY FOOTPRINT	220
	TABLE 238 BIOCIDES MARKET: COMPANY REGION FOOTPRINT	221
10.5	COMPANY EVALUATION QUADRANT (TIER 1)	222
10.5.1	STAR PLAYERS	222
10.5.2	EMERGING LEADERS	222
10.5.3	PARTICIPANT PLAYERS	222
	FIGURE 44 COMPANY EVALUATION QUADRANT FOR BIOCIDES MARKET (TIER 1)	223
10.6	COMPETITIVE BENCHMARKING	224
	TABLE 239 BIOCIDES MARKET: DETAILED LIST OF KEY START-UPS/SMES	224
	TABLE 240 BIOCIDES MARKET: COMPETITIVE BENCHMARKING OF KEY START-UPS/SMES	224
10.7	START-UP/SME EVALUATION QUADRANT	225
10.7.1	PROGRESSIVE COMPANIES	225
10.7.2	RESPONSIVE COMPANIES	225
10.7.3	STARTING BLOCKS	225
	FIGURE 45 START-UP/SME EVALUATION QUADRANT FOR BIOCIDES MARKET	225
10.8	COMPETITIVE SCENARIOS	226
10.8.1	DEALS	226
	TABLE 241 BIOCIDES MARKET: DEALS (2018-2022)	226
10.8.2	NEW PRODUCT LAUNCHES	229
	TABLE 242 BIOCIDES MARKET: NEW PRODUCT LAUNCHES (2018-2022)	229
10.8.3	OTHER DEVELOPMENTS	229
	TABLE 243 BIOCIDES MARKET: EXPANSIONS, INVESTMENTS, AND INNOVATIONS (2018-2022)	229

Biocides Market by Type (Non-oxidizing Biocide, Oxidizing Biocide), Application (Water Treatment, Household, Industrial & Institutional Cleaning and Home Care, Paints & Coatings, Wood Preservatives), and Region - Global Forecast to 2027

Market Report | 2022-11-08 | 292 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Date

2025-05-21

Signature



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com