

Report Information

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Antimicrobial Additives Market Research Report - Forecast to 2032

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Description:

Global Antimicrobial Additives Market Overview

Antimicrobial Additives Market Size was valued at USD 8.5 Billion in 2022. The Antimicrobial Additives industry is projected to grow from USD 9.112 Billion in 2023 to USD 15.89 Billion by 2032, exhibiting a compound annual growth rate (CAGR) of 7.20% during the forecast period (2023 - 2032). The growing awareness of health-related concerns, as well as the expansion of end-use industries, are the key market drivers enhancing the market growth.

Antimicrobial Additives Market Overview

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Antimicrobial Additives Market Trends

- **Growing use in the healthcare industry is driving the market growth**

Market CAGR for antimicrobial additives is being driven by the rising use in healthcare industry. A growing number of end-use industries, increased usage of silver-based products as antimicrobial additives, and rising antimicrobial product acceptance are driving the market. Antimicrobial additives are used in various end-use sectors, including paper and pulp, building and construction, commercial, healthcare, and automotive. A rise in vehicle production and investment in the broader manufacturing sector drives the need for antimicrobial compounds in the paints and coatings industry. Furthermore, the healthcare, pharmaceutical, personal care, and cosmetics industries benefit from the antimicrobial additions. The increasing frequency of Healthcare-associated Infections (HCIs) and Hospital-acquired Infections (HAIs) is driving up demand for antimicrobial additions in the healthcare industry. The Centres for Disease Control and Prevention (CDC) estimates that HAIs cause 1.7 million infections and 99,000 deaths annually in American hospitals. The increased use of antimicrobial compounds in medical equipment and healthcare furnishings reduces the danger of these illnesses.

Growing consumer awareness of health-related concerns due to the rise of life-threatening illnesses is increasing healthcare equipment makers' use of antimicrobial compounds. Adding antimicrobial chemicals to medical plastic objects helps prevent germs from sticking to the surface of these goods, hence inhibiting bacterial development. Furthermore, the growing necessity to adhere to hygiene and cleaning practices to reduce the danger of microbial cross-contamination in a critical setting is driving up demand for antimicrobial compounds in the healthcare business. Antimicrobial additives that are inexpensive and meet the minimal criteria or rules in the field are in great demand nowadays. Non-toxic polymers with enhanced qualities such as strong antibacterial activity, hardness, durability, and transparency are in great demand. Numerous large-scale plastic and paint coating manufacturers utilize antimicrobial compounds in medical equipment, bottles, and food packaging. Thus, driving the Antimicrobial Additives market revenue.

Antimicrobial Additives Market Segment Insights

Antimicrobial Additives Type Insights

The Antimicrobial Additives market segmentation, based on type, includes organic and inorganic. The inorganic segment dominated the market, accounting for 65% of market revenue. Silver-based, copper-based, and zinc-based additives are expected to drive inorganic sector demand throughout the projection period. Silver-based antimicrobial compounds are employed because of their qualities, such as non-toxicity, long-term performance, high thermal stability, environmental friendliness, and

resistance to microbial growth.

Antimicrobial Additives Application Insights

Based on application, the Antimicrobial Additives market segmentation includes plastics, paints & coatings, rubber & silicone, and fabric. The plastics segment dominated the market. Because of the adaptability of plastics, this large percentage can be attributed to significant use in manufacturing soap dispensers, food containers, surgical items, and breathing equipment. Plastic is prone to microbiological development, including bacteria and mold, which is predicted to reduce a product's useful lifetime. Throughout the production process, antimicrobial chemicals are added to plastics to resist certain germs, resulting in the long-term durability of plastic objects.

Antimicrobial Additives End Use Industry Insights

Based on the end-use industry, the Antimicrobial Additives market segmentation includes healthcare, construction, furniture, and textile. Healthcare generated the most income. This high proportion can be attributed to rising healthcare product demand due to an aging population and increased consumer healthcare awareness. The healthcare environment is especially important for Healthcare-Associated Infections (HAIs). Hospital-acquired infections (HAIs), which occur in hospitalized patients, can be fatal and are often caused by antibiotic-resistant bacteria.

Figure 1: Antimicrobial Additives Market, by End Use Industry, 2022 & 2032 (USD Billion)

Antimicrobial Additives Market, by End Use Industry, 2022 & 2032

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Antimicrobial Additives Regional Insights

By region, the study provides market insights into North America, Europe, Asia-Pacific and the Rest of the World. The North American Antimicrobial Additives market area will dominate this market. The rising frequency of HCAIs and HAIs drives up demand for antimicrobial additives in the region's healthcare business. Rising demand for sophisticated healthcare services due to increased consumer knowledge of health-related concerns will drive regional sector growth.

Further, the major countries studied in the market report are The US, Canada, Germany, Japan, India, France, the UK, Italy, Spain, China, Australia, South Korea, and Brazil.

Figure 2: ANTIMICROBIAL ADDITIVES MARKET SHARE BY REGION 2022 (USD Billion)

ANTIMICROBIAL ADDITIVES MARKET SHARE BY REGION 2022

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

The region's growing exports and increased demand for skin, hair, and personal care goods will propel the Europe antimicrobial additives market forward. Another factor contributing to the growth in product demand is the growing number of working professionals in the area, which has spurred demand for high-end personal care products. Europe Antimicrobial Additives accounts for the second-largest market share. Furthermore, the German Antimicrobial Additives market dominated, while the UK Antimicrobial Additives market grew fastest in Europe.

From 2023 to 2032, the Asia-Pacific Antimicrobial Additives Market will develop at the quickest CAGR. Growing demand for antimicrobial additives from the building and construction sectors, economic expansion, particularly in the healthcare and packaging industries, and fast industrialization drive market growth. India's building sector is rapidly developing due to expanded production capacity and rising consumption. Furthermore, China's Antimicrobial Additives market had the greatest market share, while India's Antimicrobial Additives market had the quickest growth in the Asia-Pacific region.

Antimicrobial Additives Key Market Players & Competitive Insights

Leading market companies are extensively spending R&D on increasing their product lines, which will help the Antimicrobial Additives market grow even more. Important market developments include new product releases, contractual agreements, acquisitions and mergers, greater investments, and collaboration with other organizations. The Antimicrobial Additives industry must produce cost-effective merchandise to flourish and thrive in a more competitive and increasing market climate.

Manufacturing locally to reduce operating costs is an effective business strategy manufacturers use in the worldwide Antimicrobial Additives industry to serve clients and expand the market sector. The Antimicrobial Additives industry has provided some of the most important benefits recently.. Major players in the Antimicrobial Additives market, including Bodo Möller Chemie Group, and others, are attempting to increase market demand by investing in research and development operations.

The Bodo Möller Chemie Group has 45 years of expertise in marketing specialty chemicals. It is a prominent partner of renowned worldwide chemical firms such as Huntsman, Dow, HB Fuller, DuPont, BASF, and Henkel. High-performance epoxy resin, polyurethane and silicone-based adhesives, thermosetting plastics (polyester, polyurethane, epoxy resin,silicone), pigments and additives, dyes, textile agents, electro-casting resins, tooling and laminating resins, and composites are among the company's products. Bodo Möller Chemie, located in Offenbach, Germany, rounds up its range with proprietary manufacturing facilities and laboratories for customer-specific formulations and application studies. Bodo Möller Chemie professionals provide targeted guidance and customized on-site services to customers worldwide to help them identify the best product solutions

adapted to the specific needs of many different industries. In November 2019, Bodo Möller Chemie now distributes SANITISED AG products in the Eastern European market for all plastic processing applications. SANITIZED's range focuses on antimicrobial additives for the polymer and textile industries, with wide hygiene and material protection options. Antimicrobial solutions can be utilized for a wide range of goods constructed from thermoplastic, extruded, or molded polymers, soft or hard plastics, and for coating various surfaces.

Avient exists to overcome barriers and harness the potential of innovation and sustainability worldwide. They bring together extraordinary people, ideas, and technology to develop specialized and sustainable materials that improve performance while protecting the environment. They assist clients in translating their concepts into solutions that improve their quality of life in meaningful, dynamic ways by committing to tenacious problem-solving and steadfast support. In May 2021, Avient has expanded its GLS TPE offering with three patented TPE compositions with antibacterial additives. Avient introduces GLS TPEs equipped with antibacterial technology. Avient's GLS TPEs with antimicrobial technology suppress bacterial growth by 99.9% (3-log) or higher to safeguard molded plastic parts and prevent fungal development. These additives, tested in line with JIS Z2801 and ASTM G21-15 standards, preserve molded plastic components by suppressing bacterial development and resisting fungal and mold growth.

Key Companies in the Antimicrobial Additives market include

- BASF SE
- DowDuPont
- Sanitized AG
- Biosafe Inc.
- Clariant
- NanoBioMatters
- M. Barr & Company Inc.
- PolyOne
- Milliken Chemical
- SteriTouch LTD
- Addmaster (UK).

Antimicrobial Additives Industry Developments

February 2022: Rifra Masterbatches, a worldwide player in the development of custom additives — such as color or various compounds — used in manufacturing plastic goods, has announced a new distributor collaboration with Microban International, a developer of antimicrobial product protection technology. The two businesses are working together to create novel antimicrobial masterbatches for injection, blow molding, extrusion, and compounding clients. Rifra Masterbatches has been providing different additives to the packaging, medical device, construction, E&E and toy sectors for more than 40 years and has thrived on the premise of answering its clients' expectations.

January 2021: In the Middle East and Africa, DuPont Nutrition & Biosciences introduces NovaGARD® NR 100-G. One of the most effective and label-friendly antimicrobial solutions for processed meat processors is NovaGARD® NR 100-G. DuPont introduces the NovaGARD NR 100-G throughout the Middle East and Africa. DuPont Nutrition & Biosciences (DuPont) can now deliver one of the most effective and label-friendly antimicrobial solutions to Middle Eastern and African (MEA) processed meat packers.

Antimicrobial Additives Market Segmentation

Antimicrobial Additives Type Outlook

- Organic
- Inorganic

Antimicrobial Additives Application Outlook

- Plastics
- Paints & Coatings
- Rubber & Silicone
- Fabric

Antimicrobial Additives End Use Industry Outlook

- Healthcare
- Construction
- Furniture
- Textile

Antimicrobial Additives Regional Outlook

- North America
 - US
 - Canada
- Europe
 - Germany
 - France
 - UK
 - Italy
 - Spain
 - Rest of Europe

- Asia-Pacific
 - China
 - Japan
 - India
 - Australia
 - South Korea
 - Australia
 - Rest of Asia-Pacific
- Rest of the World
 - Middle East
 - Africa
 - Latin America

Table of Content:

Contents	
1 Executive Summary	
2 Market Introduction	
2.1 Definition	23
2.2 Scope Of The Study	23
2.3 List Of Assumptions	24
2.4 Market Structure	24
3 Research Methodology	
3.1 Research Process	26
3.2 Primary Research	27
3.3 Secondary Research	28
3.4 Market Size Estimation	28
3.5 Forecast Model	29
4 Market Dynamics	
4.2 Introduction	31
4.3 Drivers	32
4.3.1 Growing Use Of Antimicrobial Additives In Plastic Applications	32
4.3.2 Expanding Global Healthcare Industry	32
4.3.3 High Adoption Rate In The Construction Industry	33
4.3.4 Drivers Impact Analysis	33
4.4 Restraints	34
4.4.1 Stringent Environmental Regulations	34
4.4.2 Restraints Impact Analysis	34
4.5 Opportunities	34
4.5.1 Increase In Plastic Waste	34
4.5.2 Increasing Adoption Of Antimicrobial Additives In Various Applications	35

4.6 Trends	35
4.6.1 Introduction Of Polymer-Based Additives	35
5 Market Factor Analysis	
5.1 Supply Chain Analysis	37
5.1.1 Raw Material Suppliers	37
5.1.2 Antimicrobial Additives Manufacturers	37
5.1.3 Distribution Channel	37
5.1.4 End-Use Industry	38
5.2 Porter's Five Forces Model	38
5.2.1 Threat Of New Entrants	39
5.2.2 Threat Of Rivalry	39
5.2.3 Threat Of Substitutes	39
5.2.4 Bargaining Power Of Suppliers	39
5.2.5 Bargaining Power Of Buyers	39
6 Global Antimicrobial Additives Market, By Type	
6.1 Introduction	41
6.2 Organic	44
6.2.1 Phenolic Biocides	46
6.2.2 Fungicides	47
6.2.3 Silane QUAT	48
6.2.4 Others	49
6.3 Inorganic	50
6.3.1 Silver Ion	52
6.3.2 Copper	53
6.3.3 Zinc	54
7 Global Antimicrobial Additives Market, By Application	
7.1 Introduction	56
7.2 Plastics	58
7.3 Paints & Coatings	59
7.4 Pulp & Paper	60
7.5 Ceramics	61
7.6 Others	62
8 Global Antimicrobial Additives Market, By End Use Industry	
8.1 Introduction	64
8.2 Healthcare	66
8.3 Construction	67
8.4 Textile	68
8.5 Packaging	69
8.6 Food & Beverages	70
8.7 Automotive	71
8.8 Others	72
9 Global Antimicrobial Additives Market, By Region	
9.1 Introduction	74
9.2 North America	80
9.2.1 US	85
9.2.2 Canada	89

9.3 Europe	93
9.3.1 Germany	98
9.3.2 UK	102
9.3.3 France	106
9.3.4 Spain	110
9.3.5 Italy	114
9.3.6 Russia	118
9.3.7 Rest Of Europe	122
9.4 Asia-Pacific	126
9.4.1 China	131
9.4.2 Japan	135
9.4.3 India	139
9.4.4 Australia & New Zealand	143
9.4.5 Rest Of Asia-Pacific	147
9.5 Latin America	151
9.5.1 Brazil	156
9.5.2 Mexico	160
9.5.3 Argentina	164
9.5.4 Rest Of Latin America	168
9.6 Middle East & Africa	172
9.6.1 Turkey	177
9.6.2 Israel	181
9.6.3 G.C.C	185
9.6.4 North Africa	189
9.6.5 Rest Of Middle East & Africa	193
10 Competitive Landscape	
10.1 Introduction	199
10.2 Market Strategy Analysis	199
10.3 Key Developments Of Market Players	200
11 Company Profiles	
11.1 DowDuPont	203
11.1.1 Company Overview	203
11.1.2 Financial Overview	203
11.1.3 Products Offered	204
11.1.4 Key Developments	204
11.1.5 Swot Analysis	204
11.1.6 Key Strategies	204
11.2 BASF SE	205
11.2.1 Company Overview	205
11.2.2 Financial Overview	205
11.2.3 Products Offered	206
11.2.4 Key Developments	206
11.2.5 Swot Analysis	206
11.2.6 Key Strategy	206
11.3 Clariant	207
11.3.1 Company Overview	207

11.3.2 Financial Overview	207
11.3.3 Products Offered	207
11.3.4 Key Developments	208
11.3.5 Swot Analysis	208
11.3.6 Key Strategies	208
11.4 PolyOne	209
11.4.1 Company Overview	209
11.4.2 Financial Overview	209
11.4.3 Products Offered	209
11.4.4 Key Developments	210
11.4.5 Swot Analysis	210
11.4.6 Key Strategy	210
11.5 Biocote Limited	211
11.5.1 Company Overview	211
11.5.2 Financial Overview	211
11.5.3 Products Offered	211
11.5.4 Key Developments	211
11.5.5 Swot Analysis	212
11.5.6 Key Strategies	212
11.6 SteriTouch Ltd	213
11.6.1 Company Overview	213
11.6.2 Financial Overview	213
11.6.3 Products Offered	213
11.6.4 Key Developments	213
11.6.5 Swot Analysis	214
11.6.6 Key Strategy	214
11.7 Sanitized AG	215
11.7.1 Company Overview	215
11.7.2 Financial Overview	215
11.7.3 Products Offered	215
11.7.4 Key Developments	215
11.7.5 Swot Analysis	216
11.7.6 Key Strategies	216
11.8 Biosafe Inc.	217
11.8.1 Company Overview	217
11.8.2 Financial Overview	217
11.8.3 Products Offered	217
11.8.4 Key Developments	217
11.8.5 Swot Analysis	217
11.8.6 Key Strategy	217
11.9 NanoBioMatters	218
11.9.1 Company Overview	218
11.9.2 Financial Overview	218
11.9.3 Products Offered	218
11.9.4 Key Developments	218
11.9.5 Swot Analysis	219
11.9.6 Key Strategies	219

11.10 W.M. Barr & Company, Inc.	220
11.10.1 Company Overview	220
11.10.2 Financial Overview	220
11.10.3 Products Offered	220
11.10.4 Key Developments	220
11.10.5 Swot Analysis	221
11.10.6 Key Strategies	221
11.11 Milliken Chemical	222
11.11.1 Company Overview	222
11.11.2 Financial Overview	222
11.11.3 Products Offered	222
11.11.4 Key Developments	222
11.11.5 Swot Analysis	222
11.11.6 Key Strategy	222
11.12 Addmaster (UK) Limited	223
11.12.1 Company Overview	223
11.12.2 Financial Overview	223
11.12.3 Products Offered	223
11.12.4 Key Developments	223
11.12.5 Swot Analysis	223
11.12.6 Key Strategies	223
12 Conclusion	
12.1 Key Findings	225
13 List Of Tables	
TABLE 1 MARKET SYNOPSIS	21
TABLE 2 LIST OF ASSUMPTIONS	24
TABLE 3 GLOBAL ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	41
TABLE 4 GLOBAL ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	42
TABLE 5 GLOBAL ORGANIC ANTIMICROBIAL ADDITIVES MARKET FOR TYPE, BY REGION 2023–2032 (USD BILLION)	42
TABLE 6 GLOBAL ORGANIC ANTIMICROBIAL ADDITIVES MARKET FOR TYPE, BY REGION 2023–2032 (KT)	43
TABLE 7 GLOBAL INORGANIC ANTIMICROBIAL ADDITIVES MARKET FOR TYPE, BY REGION 2023–2032 (USD BILLION)	43
TABLE 8 GLOBAL INORGANIC ANTIMICROBIAL ADDITIVES MARKET FOR TYPE, BY REGION 2023–2032 (KT)	44
TABLE 9 GLOBAL ORGANIC ANTIMICROBIAL ADDITIVES MARKET 2023–2032 (USD BILLION)	45
TABLE 10 GLOBAL ORGANIC ANTIMICROBIAL ADDITIVES MARKET, BY REGION 2023–2032 (KT)	46
TABLE 11 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR PHENOLIC BIOCIDES, BY REGION 2023–2032 (USD BILLION)	46
TABLE 12 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR PHENOLIC BIOCIDES, BY REGION 2023–2032 (KT)	47
TABLE 13 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR FUNGICIDES, BY REGION 2023–2032 (USD BILLION)	47
TABLE 14 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR FUNGICIDES, BY REGION 2023–2032 (KT)	48
TABLE 15 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR SILANE QUAT, BY REGION 2023–2032 (USD BILLION)	48
TABLE 16 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR SILANE QUAT, BY REGION 2023–2032 (KT)	49
TABLE 17 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR OTHERS, BY REGION 2023–2032 (USD BILLION)	49
TABLE 18 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR OTHERS, BY REGION 2023–2032 (KT)	50

TABLE 19 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR OTHERS, BY REGION 2023–2032 (USD BILLION) 51
TABLE 20 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR OTHERS, BY REGION 2023–2032 (KT) 51
TABLE 21 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR SILVER ION, BY REGION 2023–2032 (USD BILLION) 52
TABLE 22 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR SILVER ION, BY REGION 2023–2032 (KT) 52
TABLE 23 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR COPPER, BY REGION 2023–2032 (USD BILLION) 53
TABLE 24 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR COPPER, BY REGION 2023–2032 (KT) 53
TABLE 25 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR ZINC, BY REGION 2023–2032 (USD BILLION) 54
TABLE 26 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR ZINC, BY REGION 2023–2032 (KT) 54
TABLE 27 GLOBAL ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION) 56
TABLE 28 GLOBAL ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (KT) 57
TABLE 29 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR PLASTICS, BY REGION 2023–2032 (USD BILLION) 58
TABLE 30 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR PLASTICS, BY REGION 2023–2032 (KT) 58
TABLE 31 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR PAINTS & COATINGS, BY REGION 2023–2032 (USD BILLION) 59
TABLE 32 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR PAINTS & COATINGS, BY REGION 2023–2032 (KT) 59
TABLE 33 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR PULP & PAPER, BY REGION 2023–2032 (USD BILLION) 60
TABLE 34 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR PULP & PAPER, BY REGION 2023–2032 (KT) 60
TABLE 35 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR CERAMICS, BY REGION 2023–2032 (USD BILLION) 61
TABLE 36 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR CERAMICS, BY REGION 2023–2032 (KT) 61
TABLE 37 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR OTHERS, BY REGION 2023–2032 (USD BILLION) 62
TABLE 38 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR OTHERS, BY REGION 2023–2032 (KT) 62
TABLE 39 GLOBAL ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION) 64
TABLE 40 GLOBAL ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT) 65
TABLE 41 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR HEALTHCARE, BY REGION 2023–2032 (USD BILLION) 66
TABLE 42 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR HEALTHCARE, BY REGION 2023–2032 (KT) 66
TABLE 43 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR CONSTRUCTION, BY REGION 2023–2032 (USD BILLION) 67
TABLE 44 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR CONSTRUCTION, BY REGION 2023–2032 (KT) 67
TABLE 45 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR TEXTILE, BY REGION 2023–2032 (USD BILLION) 68
TABLE 46 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR TEXTILE, BY REGION 2023–2032 (KT) 68
TABLE 47 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR PACKAGING, BY REGION 2023–2032 (USD BILLION) 69
TABLE 48 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR PACKAGING, BY REGION 2023–2032 (KT) 69
TABLE 49 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR FOOD & BEVERAGES, BY REGION 2023–2032 (USD BILLION) 70
TABLE 50 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR FOOD & BEVERAGES, BY REGION 2023–2032 (KT) 70
TABLE 51 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR OTHERS, BY REGION 2023–2032 (USD BILLION) 71
TABLE 52 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR OTHERS, BY REGION 2023–2032 (KT) 71
TABLE 53 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR OTHERS, BY REGION 2023–2032 (USD BILLION) 72
TABLE 54 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR OTHERS, BY REGION 2023–2032 (KT) 72
TABLE 55 GLOBAL ANTIMICROBIAL ADDITIVES MARKET, BY REGION 2023–2032 (USD BILLION) 74

TABLE 56 GLOBAL ANTIMICROBIAL ADDITIVES MARKET, BY REGION 2023–2032 (KT)	75
TABLE 57 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR TYPE, BY REGION 2023–2032 (USD BILLION)	75
TABLE 58 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR TYPE, BY REGION 2023–2032 (KT)	76
TABLE 59 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY REGION 2023–2032 (USD BILLION)	76
TABLE 60 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY REGION 2023–2032 (KT)	77
TABLE 61 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY REGION 2023–2032 (USD BILLION)	77
TABLE 62 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY REGION 2023–2032 (KT)	77
TABLE 63 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR APPLICATION, BY REGION 2023–2032 (USD BILLION)	78
TABLE 64 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR APPLICATION, BY REGION 2023–2032 (KT)	78
TABLE 65 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR END USE INDUSTRY, BY REGION 2023–2032 (USD BILLION)	79
TABLE 66 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR END USE INDUSTRY, BY REGION 2023–2032 (KT)	79
TABLE 67 NORTH AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY COUNTRY 2023–2032 (USD BILLION)	80
TABLE 68 NORTH AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY COUNTRY 2023–2032 (KT)	80
TABLE 69 NORTH AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	80
TABLE 70 NORTH AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	81
TABLE 71 NORTH AMERICA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	81
TABLE 72 NORTH AMERICA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC BY TYPE 2023–2032 (KT)	81
TABLE 73 NORTH AMERICA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION)	82
TABLE 74 NORTH AMERICA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)	82
TABLE 75 NORTH AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	83
TABLE 76 NORTH AMERICA ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT)	83
TABLE 77 NORTH AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)	84
TABLE 78 NORTH AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT)	84
TABLE 79 US ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	85
TABLE 80 US ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	85
TABLE 81 US ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	85
TABLE 82 US ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC BY TYPE 2023–2032 (KT)	86
TABLE 83 US ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION)	86
TABLE 84 US ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)	86
TABLE 85 US ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	87
TABLE 86 US ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT)	87
TABLE 87 US ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)	88
TABLE 88 US ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT)	88
TABLE 89 CANADA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	89
TABLE 90 CANADA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	89
TABLE 91 CANADA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (CANADAD BILLION)	89
TABLE 92 CANADA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC BY TYPE 2023–2032 (KT)	90
TABLE 93 CANADA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (CANADAD BILLION)	90
TABLE 94 CANADA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)	90

TABLE 95 CANADA ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	91
TABLE 96 CANADA ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT)	91
TABLE 97 CANADA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)	92
TABLE 98 CANADA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT)	92
TABLE 99 EUROPE ANTIMICROBIAL ADDITIVES MARKET, BY COUNTRY 2023–2032 (USD BILLION)	93
TABLE 100 EUROPE ANTIMICROBIAL ADDITIVES MARKET, BY COUNTRY 2023–2032 (KT)	93
TABLE 101 EUROPE ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	94
TABLE 102 EUROPE ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	94
TABLE 103 EUROPE ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	94
TABLE 104 EUROPE ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT)	95
TABLE 105 EUROPE ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION)	95
TABLE 106 EUROPE ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)	95
TABLE 107 EUROPE ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	96
TABLE 108 EUROPE ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT)	96
TABLE 109 EUROPE ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)	97
TABLE 110 EUROPE ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT)	97
TABLE 111 GERMANY ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	98
TABLE 112 GERMANY ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	98
TABLE 113 GERMANY ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	98
TABLE 114 GERMANY ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT)	99
TABLE 115 GERMANY ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION)	99
TABLE 116 GERMANY ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)	99
TABLE 117 GERMANY ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	100
TABLE 118 GERMANY ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT)	100
TABLE 119 GERMANY ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)	101
TABLE 120 GERMANY ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT)	101
TABLE 121 UK ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	102
TABLE 122 UK ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	102
TABLE 123 UK ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	102
TABLE 124 UK ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT)	103
TABLE 125 UK ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION)	103
TABLE 126 UK ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)	103
TABLE 127 UK ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	104
TABLE 128 UK ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT)	104
TABLE 129 UK ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)	105
TABLE 130 UK ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT)	105
TABLE 131 FRANCE ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	106
TABLE 132 FRANCE ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	106
TABLE 133 FRANCE ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	106
TABLE 134 FRANCE ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT)	107
TABLE 135 FRANCE ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION)	107

TABLE 136 FRANCE ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)	107
TABLE 137 FRANCE ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	108
TABLE 138 FRANCE ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT)	108
TABLE 139 FRANCE ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)	109
TABLE 140 FRANCE ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT)	109
TABLE 141 SPAIN ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	110
TABLE 142 SPAIN ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	110
TABLE 143 SPAIN ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	110
TABLE 144 SPAIN ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT)	111
TABLE 145 SPAIN ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION)	111
TABLE 146 SPAIN ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)	111
TABLE 147 SPAIN ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	112
TABLE 148 SPAIN ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT)	112
TABLE 149 SPAIN ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)	113
TABLE 150 SPAIN ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT)	113
TABLE 151 ITALY ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	114
TABLE 152 ITALY ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	114
TABLE 153 ITALY ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	114
TABLE 154 ITALY ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT)	115
TABLE 155 ITALY ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION)	115
TABLE 156 ITALY ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)	115
TABLE 157 ITALY ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	116
TABLE 158 ITALY ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT)	116
TABLE 159 ITALY ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)	117
TABLE 160 ITALY ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT)	117
TABLE 161 RUSSIA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	118
TABLE 162 RUSSIA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	118
TABLE 163 RUSSIA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	118
TABLE 164 RUSSIA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT)	119
TABLE 165 RUSSIA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION)	119
TABLE 166 RUSSIA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)	119
TABLE 167 RUSSIA ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	120
TABLE 168 RUSSIA ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT)	120
TABLE 169 RUSSIA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)	121
TABLE 170 RUSSIA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT)	121
TABLE 171 REST OF EUROPE ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	122
TABLE 172 REST OF EUROPE ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	122
TABLE 173 REST OF EUROPE ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	122
TABLE 174 REST OF EUROPE ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT)	123
TABLE 175 REST OF EUROPE ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION)	123

TABLE 176 REST OF EUROPE ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT) 123

TABLE 177 REST OF EUROPE ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION) 124

TABLE 178 REST OF EUROPE ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT) 124

TABLE 179 REST OF EUROPE ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION) 125

TABLE 180 REST OF EUROPE ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT) 125

TABLE 181 ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET, BY COUNTRY 2023–2032 (USD BILLION) 126

TABLE 182 ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET, BY COUNTRY 2023–2032 (KT) 126

TABLE 183 ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION) 127

TABLE 184 ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT) 127

TABLE 185 ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION) 127

TABLE 186 ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT) 128

TABLE 187 ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION) 128

TABLE 188 ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT) 128

TABLE 189 ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION) 129

TABLE 190 ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT) 129

TABLE 191 ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION) 130

TABLE 192 ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT) 130

TABLE 193 CHINA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION) 131

TABLE 194 CHINA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT) 131

TABLE 195 CHINA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION) 131

TABLE 196 CHINA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT) 132

TABLE 197 CHINA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION) 132

TABLE 198 CHINA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT) 132

TABLE 199 CHINA ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION) 133

TABLE 200 CHINA ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT) 133

TABLE 201 CHINA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION) 134

TABLE 202 CHINA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT) 134

TABLE 203 JAPAN ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION) 135

TABLE 204 JAPAN ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT) 135

TABLE 205 JAPAN ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION) 135

TABLE 206 JAPAN ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT) 136

TABLE 207 JAPAN ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION) 136

TABLE 208 JAPAN ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT) 136

TABLE 209 JAPAN ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION) 137

TABLE 210 JAPAN ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT) 137

TABLE 211 JAPAN ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION) 138

TABLE 212 JAPAN ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT) 138

TABLE 213 INDIA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION) 139

TABLE 214 INDIA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT) 139

TABLE 215 INDIA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	139
TABLE 216 INDIA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT)	140
TABLE 217 INDIA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION)	140
TABLE 218 INDIA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)	140
TABLE 219 INDIA ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	141
TABLE 220 INDIA ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT)	141
TABLE 221 INDIA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)	142
TABLE 222 INDIA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT)	142
TABLE 223 AUSTRALIA & NEW ZEALAND ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	143
TABLE 224 AUSTRALIA & NEW ZEALAND ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	143
TABLE 225 AUSTRALIA & NEW ZEALAND ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	143
TABLE 226 AUSTRALIA & NEW ZEALAND ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT)	144
TABLE 227 AUSTRALIA & NEW ZEALAND ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION)	144
TABLE 228 AUSTRALIA & NEW ZEALAND ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)	144
TABLE 229 AUSTRALIA & NEW ZEALAND ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	145
TABLE 230 AUSTRALIA & NEW ZEALAND ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT)	145
TABLE 231 AUSTRALIA & NEW ZEALAND ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)	146
TABLE 232 AUSTRALIA & NEW ZEALAND ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT)	146
TABLE 233 REST OF ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	147
TABLE 234 REST OF ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	147
TABLE 235 REST OF ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	147
TABLE 236 REST OF ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT)	148
TABLE 237 REST OF ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION)	148
TABLE 238 REST OF ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)	148
TABLE 239 REST OF ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	149
TABLE 240 REST OF ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT)	149
TABLE 241 REST OF ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	150
TABLE 242 REST OF ASIA-PACIFIC ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (KT)	150
TABLE 243 LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY COUNTRY 2023–2032 (USD BILLION)	151
TABLE 244 LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY COUNTRY 2023–2032 (KT)	151
TABLE 245 LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	151
TABLE 246 LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	152
TABLE 247 LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	152
TABLE 248 LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT)	153
TABLE 249 LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032	

(USD BILLION) 153

TABLE 250 LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)
153

TABLE 251 LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD
BILLION) 154

TABLE 252 LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT) 154

TABLE 253 LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD
BILLION) 155

TABLE 254 LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT)
155

TABLE 255 BRAZIL ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION) 156

TABLE 256 BRAZIL ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT) 156

TABLE 257 BRAZIL ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)
156

TABLE 258 BRAZIL ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT) 157

TABLE 259 BRAZIL ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD
BILLION) 157

TABLE 260 BRAZIL ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT) 157

TABLE 261 BRAZIL ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION) 158

TABLE 262 BRAZIL ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT) 158

TABLE 263 BRAZIL ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)
159

TABLE 264 BRAZIL ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT) 159

TABLE 265 MEXICO ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION). 160

TABLE 266 MEXICO ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT) 160

TABLE 267 MEXICO ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD
BILLION) 160

TABLE 268 MEXICO ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT) 161

TABLE 269 MEXICO ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD
BILLION) 161

TABLE 270 MEXICO ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT) 161

TABLE 271 MEXICO ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION) 162

TABLE 272 MEXICO ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT) 162

TABLE 273 MEXICO ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)
163

TABLE 274 MEXICO ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT) 163

TABLE 275 ARGENTINA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION) 164

TABLE 276 ARGENTINA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT) 164

TABLE 277 ARGENTINA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD
BILLION) 164

TABLE 278 ARGENTINA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT) 165

TABLE 279 ARGENTINA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD
BILLION) 165

TABLE 280 ARGENTINA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT) 165

TABLE 281 ARGENTINA ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)
166

TABLE 282 ARGENTINA ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT) 166

TABLE 283 ARGENTINA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD
BILLION) 167

TABLE 284 ARGENTINA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT) 167

TABLE 285 REST OF LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD
BILLION) 168

TABLE 286 REST OF LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT) 168

TABLE 287 REST OF LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–
2032 (USD BILLION) 168

TABLE 288 REST OF LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT) 169

TABLE 289 REST OF LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION) 169

TABLE 290 REST OF LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT) 169

TABLE 291 REST OF LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION) 170

TABLE 292 REST OF LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT) 170

TABLE 293 REST OF LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION) 171

TABLE 294 REST OF LATIN AMERICA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT) 171

TABLE 295 MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET, BY COUNTRY 2023–2032 (USD BILLION) 172

TABLE 296 MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET, BY COUNTRY 2023–2032 (KT) 172

TABLE 297 MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION) 172

TABLE 298 MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT) 173

TABLE 299 MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION) 173

TABLE 300 MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT) 174

TABLE 301 MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION) 174

TABLE 302 MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT) 174

TABLE 303 MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION) 175

TABLE 304 MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT) 175

TABLE 305 MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION) 176

TABLE 306 MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT) 176

TABLE 307 TURKEY ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION) 177

TABLE 308 TURKEY ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT) 177

TABLE 309 TURKEY ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION) 177

TABLE 310 TURKEY ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT) 178

TABLE 311 TURKEY ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION) 178

TABLE 312 TURKEY ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT) 178

TABLE 313 TURKEY ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION) 179

TABLE 314 TURKEY ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT) 179

TABLE 315 TURKEY ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION) 180

TABLE 316 TURKEY ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT) 180

TABLE 317 ISRAEL ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION) 181

TABLE 318 ISRAEL ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT) 181

TABLE 319 ISRAEL ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION) 181

TABLE 320 ISRAEL ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT) 182

TABLE 321 ISRAEL ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION) 182

TABLE 322 ISRAEL ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT) 182

TABLE 323 ISRAEL ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	183
TABLE 324 ISRAEL ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT)	183
TABLE 325 ISRAEL ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)	184
TABLE 326 ISRAEL ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT)	184
TABLE 327 GCC ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	185
TABLE 328 GCC ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	185
TABLE 329 GCC ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	185
TABLE 330 GCC ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT)	186
TABLE 331 GCC ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION)	186
TABLE 332 GCC ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)	186
TABLE 333 GCC ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	187
TABLE 334 GCC ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT)	187
TABLE 335 GCC ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)	188
TABLE 336 GCC ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT)	188
TABLE 337 NORTH AFRICA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	189
TABLE 338 NORTH AFRICA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	189
TABLE 339 NORTH AFRICA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	189
TABLE 340 NORTH AFRICA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT)	190
TABLE 341 NORTH AFRICA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION)	190
TABLE 342 NORTH AFRICA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)	190
TABLE 343 NORTH AFRICA ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)	191
TABLE 344 NORTH AFRICA ANTIMICROBIAL ADDITIVES MARKET BY END USE INDUSTRY 2023–2032 (KT)	191
TABLE 345 NORTH AFRICA ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	192
TABLE 346 NORTH AFRICA ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (KT)	192
TABLE 347 REST OF MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	193
TABLE 348 REST OF MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	193
TABLE 349 REST OF MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (USD BILLION)	193
TABLE 350 REST OF MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET FOR ORGANIC, BY TYPE 2023–2032 (KT)	194
TABLE 351 REST OF MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (USD BILLION)	194
TABLE 352 REST OF MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET FOR INORGANIC, BY TYPE 2023–2032 (KT)	195
TABLE 353 REST OF MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	195
TABLE 354 REST OF MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET BY APPLICATION 2023–2032 (KT)	196
TABLE 355 REST OF MIDDLE EAST & AFRICA ANTIMICROBIAL ADDITIVES MARKET, BY END US	
14 List Of Figures	
FIGURE 1 GLOBAL ANTIMICROBIAL ADDITIVES MARKET: MARKET STRUCTURE	24
FIGURE 2 RESEARCH PROCESS OF MRFR	26
FIGURE 3 TOP-DOWN AND BOTTOM-UP APPROACH	29

FIGURE 4 MARKET DYNAMICS OVERVIEW	31
FIGURE 5 DRIVERS IMPACT ANALYSIS: GLOBAL ANTIMICROBIAL ADDITIVES MARKET	33
FIGURE 6 RESTRAINTS IMPACT ANALYSIS: GLOBAL ANTIMICROBIAL ADDITIVES MARKET	34
FIGURE 7 SUPPLY CHAIN: ANTIMICROBIAL ADDITIVES MARKET	37
FIGURE 8 PORTER'S FIVE FORCES ANALYSIS OF THE GLOBAL ANTIMICROBIAL ADDITIVES MARKET	38
FIGURE 9 GLOBAL ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (USD BILLION)	41
FIGURE 10 GLOBAL ANTIMICROBIAL ADDITIVES MARKET, BY TYPE 2023–2032 (KT)	42
FIGURE 11 GLOBAL ORGANIC ANTIMICROBIAL ADDITIVES MARKET 2023–2032 (USD BILLION)	44
FIGURE 12 GLOBAL ORGANIC ANTIMICROBIAL ADDITIVES MARKET, BY REGION 2023–2032 (KT)	45
FIGURE 13 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR OTHERS, BY REGION 2023–2032 (USD BILLION)	50
FIGURE 14 GLOBAL ANTIMICROBIAL ADDITIVES MARKET FOR OTHERS, BY REGION 2023–2032 (KT)	51
FIGURE 15 GLOBAL ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (USD BILLION)	56
FIGURE 16 GLOBAL ANTIMICROBIAL ADDITIVES MARKET, BY APPLICATION 2023–2032 (KT)	57
FIGURE 17 GLOBAL ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (USD BILLION)	64
FIGURE 18 GLOBAL ANTIMICROBIAL ADDITIVES MARKET, BY END USE INDUSTRY 2023–2032 (KT)	65
FIGURE 19 GLOBAL ANTIMICROBIAL ADDITIVES MARKET, BY REGION 2023–2032 (USD BILLION)	74
FIGURE 20 GLOBAL ANTIMICROBIAL ADDITIVES MARKET, BY REGION 2023–2032 (KT)	75
FIGURE 21 MARKET STRATEGY ANALYSIS	200