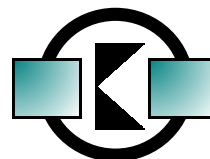
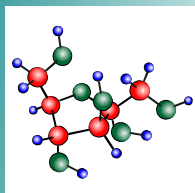


NOW AVAILABLE

SPECIALTY BIOCIDES NORTH AMERICA 2000



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INTRODUCTION

Kline & Company is pleased to announce the publication of its new, 500+ page syndicated analysis **SPECIALTY BIOCIDES NORTH AMERICA 2000**, which provides a comprehensive analysis of this complex and fragmented market, including:

- Distinct and detailed analyses of seven major specialty biocide categories, more than 50 individual products (described in Table 1), and 16 end-use markets
- Industry dynamics and key trends, including an assessment of the business implications of these issues
- Complete business profiles of upward of 12 specialty biocide suppliers and summary profiles of 25 other specialty biocide suppliers
- Overall business outlook and appraisal

For the purposes of this study, North America is defined as the United States and Canada.

TABLE OF CONTENTS

1. EXECUTIVE SUMMARY

2. INTRODUCTION

3. PRODUCTS

- 3A. Halogenated biocides
- 3B. Inorganic biocides
- 3C. Nitrogen-based biocides
- 3D. Phenolic biocides
- 3E. Organosulfur biocides
- 3F. Organometallic biocides
- 3G. Miscellaneous biocides

For each product category, the following information is provided:

- Overview of market, including summary cross-references of North American consumption by application and individual product, supplier sales, and outlook through 2004
- For each product covered, the following information is provided:
 - Estimated North American consumption in volume and value by individual application
 - Estimated supplier sales by product in volume and value
 - Forecast North American consumption of each individual product through 2004 and supporting rationale

4. APPLICATIONS

- 4A. Adhesives and sealants
- 4B. Cooling water
- 4C. Cosmetics and toiletries
- 4D. Disinfectants and sanitizers and household cleaning products
- 4E. Hospital and medical antiseptics and sterilants
- 4F. Leather tanning
- 4G. Metalworking fluids

4H. Mineral slurries

- 4I. Paints and coatings
- 4J. Paper
- 4K. Petroleum production and distribution
- 4L. Plastics and resins
- 4M. Recreational water
- 4N. Synthetic latex polymers
- 4O. Textiles
- 4P. Wood preservation

For each end-use application, the following information is provided:

- Introduction, including industry overview
- Products
 - Class
 - Grades and prices
 - Methods and levels of use
 - Estimated consumption in volume and value
 - Major customers
 - Supplier sales
 - Channels of distribution
 - Market developments
 - Regulatory issues
 - Future outlook through 2004 and rationale
 - Appraisal

5. SUPPLIERS

- 5A. Albright & Wilson Americas (Rhodia)
- 5B. Arch Chemicals
- 5C. Avecia
- 5D. Bayer Corporation
- 5E. Buckman Laboratories
- 5F. Dow Chemical
- 5G. Great Lakes Chemical Corporation
- 5H. ISP Sutton Laboratories
- 5I. Lonza, Inc.
- 5J. Nipa Laboratories/Clariant
- 5K. Rohm and Haas
- 5L. Union Carbide

For each company, the following information will be provided:

- Background
- Organization
- Management and personnel
- Sales and financial performance
- Products and markets
- Sales and marketing strategy
- Manufacturing facilities
- Research and development
- Outlook and appraisal

6. OTHER SUPPLIERS

Summary profiles are provided for the following companies:

- Acti-Chem Specialties
- Aegis Environmental Management
- Akcros/Akzo Nobel
- Albemarle
- Alco Chemical
- American Chemet
- Baker Petrolite
- Chemical Specialties
- Ciba Specialty Chemicals
- Creanova
- Dead Sea Bromine
- Ferro
- FMC
- Halosource
- Hickson (Arch Chemicals)
- Mason Chemical Company
- McIntyre Group
- Nalco (Calgon)
- OxyChem
- Osmose Wood Preserving
- Stepan
- Thomson Research Associates
- U.S. Borax
- Verichem
- Vinings Industries

APPENDIX:

List of organizations interviewed

SPECIALTY
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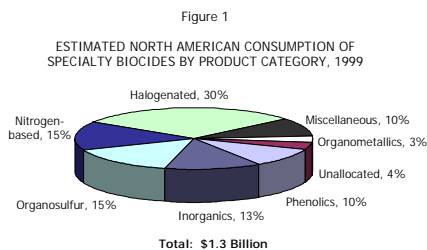
Table 1

SPECIALTY BIOCIDES COVERED IN THIS STUDY BY BIOCIDES CLASS

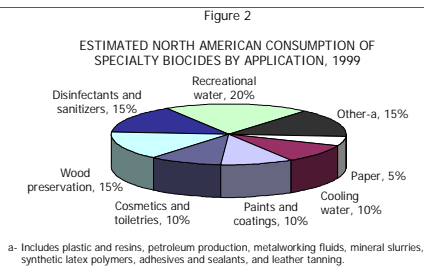
Biocide class	Products covered
Halogenated	<ul style="list-style-type: none"> ■ 1,2-Dibromo-2,4-dicyanobutane (DBDCB) ■ 2,2-Dibromo-3-nitrilopropionamide (DBNPA) ■ 2-Bromo-2-nitropropane-1,3-diol (BNPD) ■ 3-Iodo-2-propynylbutyl carbamate (IPBC) ■ Chlorhexidine gluconate ■ Chloroisocyanurates ■ Chlorothalonil ■ Halogenated hydantoins ■ Iodophors ■ Polyvinylpyrrolidone-iodine (PVP-iodine) ■ Sodium bromide (NaBr)
Inorganics	<ul style="list-style-type: none"> ■ Ammoniacal copper quaternate (ACQ) ■ Ammoniacal copper zinc arsenate (ACZA) ■ Borates ■ Chromated copper arsenate (CCA) ■ Copper thiocyanate (CuSCN) ■ Cuprous oxide (Cu₂O)
Nitrogen-based	<ul style="list-style-type: none"> ■ 1,3-Dimethyl-5,5-dimethylhydantoin (DMDM hydantoin) ■ Azoles ■ <i>cis</i>-1-(3-Chloroallyl)-3,5,7-triaza-1-azoniaadamantane chloride (DOWICIL 200) ■ Diazolidinyl ureas and imidazolidinyl ureas ■ Oxazolidines ■ Poly(oxyethylene(dimethyliminio)ethylene(dimethyliminio)ethylene dichloride) (WSCP) ■ Quaternary ammonium compounds (quats) ■ Triazines
Phenolics	<ul style="list-style-type: none"> ■ (5-Chloro-2,4-dichlorophenoxy)phenol (triclosan) ■ 3,4,4'-Trichlorocarbanilide (triclocarban) ■ <i>o</i>-Benzo-<i>p</i>-chlorophenol (OBCP) ■ <i>o</i>-Phenylphenol (OPP) ■ Pentachlorophenol (PCP) ■ Phenoxyethanol ■ <i>p</i>-Hydroxybenzoates (parabens)
Organometallics	<ul style="list-style-type: none"> ■ 10,10'-Oxybisphenoxarsine (OBPA) ■ Bis(tributyltin) oxide (TBTO) ■ Copper naphthenate (CuN) ■ Copper-8-quinolinolate (CuQ) ■ Zinc naphthenate (ZnN)
Miscellaneous	<ul style="list-style-type: none"> ■ Glutaraldehyde ■ Peracetic acid ■ Polyhexamethylene biguanide hydrochloride
Organosulfur	<ul style="list-style-type: none"> ■ 1,2-Benzisothiazolin-3-one (BIT) ■ 2-(Thiocyanomethylthio) benzothiazole (TCMTB) ■ 2-n-Octyl-4-isothiazolin-3-one (OIT) ■ 4,5-Dichloro-2-n-octyl-4-isothiazolin-3-one (DCNOIT) ■ 5-Chloro-2-methyl-4-isothiazolin-3-one and 2-methyl-4-isothiazolin-3-one (CIT/MIT) ■ Dithiocarbamates ■ Methylenebis(thiocyanate) (MBT) ■ Sodium 2-pyridinethiol-1-oxide (NPT) ■ Tetrahydro-3,5-dimethyl-2H-1,3,5-thiadiazine-2-thione (thione) ■ Zinc-2-pyridinethiol-2-oxide (ZPT)

THE BUSINESS

The North American specialty biocides market, currently valued at around \$1.3 billion, is in a relatively dynamic phase, driven by continued supplier and customer base consolidation and regulatory pressures. Halogenated specialty biocides comprise the leading product category by volume with a 30% share of the total market, as shown in Figure 1.



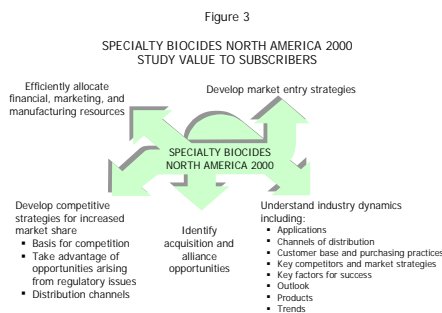
Recreational water, disinfectants and sanitizers, wood preservation, and cosmetics and toiletries are the leading applications for specialty biocides and together account for an estimated 60% of total consumption value, as shown in Figure 2.



THE REPORT

Sustained viability and profitability in such a competitive and dynamic industry demands accurate and timely information. This study provides the critical market and competitive

intelligence needed to formulate effective strategic and business plans, for suppliers that are already participating in this market as well as those that are contemplating market entry. This foundation of information and insight will help facilitate the efficient allocation of financial, marketing, and manufacturing resources necessary for future business development, as shown in Figure 3.



RESEARCH METHODOLOGY

Kline's research approach places the greatest emphasis on primary research to ensure that the foundation of business intelligence and insight is accurate and current. The report is based primarily on a series of interviews with upward of 250 persons at more than 190 organizations, including customers, suppliers, distributors, formulators, trade associations, and government agencies throughout the United States and Canada. A schedule of interviews is provided below: The report also draws upon:

Type of organization	Number of organizations	Number of persons
Biocide suppliers/distributors	52	119
Biocide end users	131	115
Regulatory/environmental agencies and other associations	13	26
Total	196	260

- (1) suppliers product literature;
- (2) EPA registration data;
- (3) an analysis of statistical data from government, trade associations, and industry;
- (4) non-confidential information from Kline's database.

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- Access to the original call reports (except where information was provided on a confidential basis)
- Three copies of each report volume in hard copy
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PART 1

SPECIALTY BIOCIDES NORTH AMERICA 2000 SUBSCRIPTION OPTIONS AND PRICE LIST

Chapter	Price	Check here to indicate subscription preference
WHOLE STUDY	\$28,435	<input type="checkbox"/>
PRODUCT CATEGORIES		
Halogenated biocides	7,000	<input type="checkbox"/>
Inorganic biocides	2,500	<input type="checkbox"/>
Nitrogen-based biocides	5,000	<input type="checkbox"/>
Phenolic biocides	5,000	<input type="checkbox"/>
Organosulfur biocides	7,000	<input type="checkbox"/>
Organometallic biocides	2,500	<input type="checkbox"/>
Miscellaneous biocides	3,500	<input type="checkbox"/>
APPLICATIONS		
Adhesives and sealants	4,500	<input type="checkbox"/>
Cooling water	5,500	<input type="checkbox"/>
Cosmetics and toiletries	5,500	<input type="checkbox"/>
Disinfectants and sanitizers	4,500	<input type="checkbox"/>
Hospital and medical antiseptics and sterilants	4,000	<input type="checkbox"/>
Leather tanning	4,500	<input type="checkbox"/>
Metalworking fluids	5,000	<input type="checkbox"/>
Mineral slurries	2,500	<input type="checkbox"/>
Paints and coatings	5,500	<input type="checkbox"/>
Paper	5,500	<input type="checkbox"/>
Petroleum production and distribution	4,000	<input type="checkbox"/>
Plastics and resins	4,000	<input type="checkbox"/>
Recreational water	4,500	<input type="checkbox"/>
Synthetic latex polymers	4,000	<input type="checkbox"/>
Textiles	2,500	<input type="checkbox"/>
Wood preservation	4,500	<input type="checkbox"/>
SUPPLIER PROFILES		
Class A-a	2,000-b,c	<input type="checkbox"/>
Class B-a	500-b,c	<input type="checkbox"/>

TOTAL

(Please fill in total)

- a- See PART 2 for listing of individual companies.
b- Price for each single profile.
c- Please check selection in PART 2.

PART 2

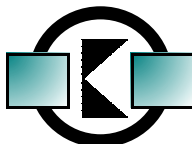
COMPANIES PROFILED IN SPECIALTY BIOCIDES NORTH AMERICA 2000

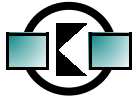
CLASS A

- Albright & Wilson Americas (Rhodia)
- Arch Chemicals
- Avecia
- Bayer Corporation
- Buckman Laboratories
- Dow Chemical
- Great Lakes Chemical Corporation
- ISP Sutton Laboratories
- Lonza, Inc.
- Nipa Laboratories/Clariant
- Rohm and Haas
- Union Carbide

CLASS B

- Acti-Chem Specialties
- Aegis Environmental Management
- Akcros/Akzo Nobel
- Albemarle
- Alco Chemical
- American Chemet
- Baker Petrolite
- Chemical Specialties
- Ciba Specialty Chemicals
- Creanova
- Dead Sea Bromine
- Ferro
- FMC
- Halosource
- Hickson (Arch Chemicals)
- Manson Chemical Company
- McIntyre Group
- Nalco (Calgon)
- OxyChem
- Osmose Wood Preserving
- Stepan
- Thomson Research Associates
- U.S. Borax
- Verichem
- Vinings Industries





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