

Specialty Biocides 2008 Global Series: Market Analysis and Opportunities

2nd Edition

Published 4th Quarter 2008 (Base Year: 2007)

- China
- Japan
- India

Published 1st Quarter 2009 (Base Year: 2008)

- Europe
- North America

Kline & Company is pleased to announce the second edition of our benchmark series of regional market analyses on biocidal actives is now available. The report series is specifically designed to assist suppliers and formulators of specialty biocides in understanding the market dynamics of each significant market and product segment in these regions and in capitalizing on the developing business opportunities.

The series addresses the following questions:

- What is the consumption in both volume and value of specialty biocides by product type, application, and region?
- What is the growth potential for specialty biocides to 2013, and what is driving growth by product, application, and region?
- What are the trends within each application for different biocide groups?
- How will future legislative trends, particularly in Europe, affect development of the specialty biocides market?
- How important are formulations, and what is the role of the formulator in this market?
- Who are the leading suppliers of specialty biocides by product type, application, and region?
- What is the outlook for selected specialty biocide suppliers?

Report Scope

Specialty Biocides 2008 Global Series: Market Analysis and Opportunities provides a detailed independent appraisal of the Specialty Biocides market, including current and forecast demand by major biocide product group. Biocide consumption and forecasts are provided for 16 end-use industries. Product selection criteria, distribution channels, and formulation usage is also assessed.

The second edition includes several new features, including:

- Analysis of the formulated biocides market for industrial preservation applications where possible in each region (adhesives and sealants, antifoulant marine coatings, metalworking fluids, paints and coatings, plastics and resins, and synthetic latex polymers)
- Extended geographic coverage to include India

A global Executive Summary will contain top-line data on the United States, Europe, Japan, China, and India.

The base year for the China, India, and Japan reports is 2007 and 2008 for Europe and the United States. The reports include forecasts to the years 2012 and 2013, respectively.

Key Benefits

This report assists specialty biocide producers and formulators in understanding the evolution of the market in each end-use industry and product group, enabling subscribers to exploit opportunities for growth. It also serves as an invaluable tool in the strategic planning process.

The report will provide subscribers with:

- A reliable and independent assessment of the specialty biocides market, enabling each subscriber to understand the key dynamics in which this market operates
- An assessment of key growth areas by product, application and region to assist with marketing and sales strategies
- An appraisal of market trends and supply and demand drivers, enabling subscribers to position their products or develop new products to capitalize on these trends
- An understanding of formulations in the market, and thus the role of the formulator, which will enable biocide suppliers to better develop relationships with their target customer group
- Competitive intelligence for use in benchmarking and identifying best practices in the industry
- Forecasting scenarios from which to base solid strategic business plans

Tables 1 through 5 specify what is included in each region regarding products and applications.

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Table 1
China

Industrial preservation						Water treatment				Other applications					
Adhesives and sealants	Antifoulant marine coatings	Metalworking fluids	Paints and coatings	Plastics and resins	Synthetic latex polymers	Cooling water	Oilfield and gas field applications	Paper	Recreational water	Animal biosecurity	Aquaculture	Hospital surface and medical instrument disinfection	HI&I cleaning products	Leather tanning	Wood preservation
Chloro-anthil Triazines OBPA BIT CIT/MIT OIT	Cu ₂ O Diuron TBTC TBTO DCOIT ZPT CPT	Triazines MBM BIT OIT Glutaraldehyde	IPBC Quats OBPA BIT CIT/MIT OIT DCOIT	Silver (Ag+) OBPA TBTO DCOIT OIT Butyl BIT	Triazines BIT CIT/MIT	Chloro-isocyanurates Halogenated hydantoin DBNPA BNPD Quats Glutaraldehyde	Quats CIT/MIT Glutaraldehyde	DBNPA BNPD Quats Triazines Dithio-carbamate CIT/MIT TCMTB Thiones	Chloro-isocyanurates DBNPA	Chloro-isocyanurates PVP-I Iodophor Quats Peracetic acid Glutaraldehyde	Chloro-isocyanurates Halogenated hydantoin PVP-I Quats Glutaraldehyde	Chloro-isocyanurates Peracetic acid Glutaraldehyde	Chloro-isocyanurates Quats BIT CIT/MIT Peracetic acid Glutaraldehyde DMDMH	Salicylamide Dithio-carbamate CIT/MIT OIT MTB TCMTB	CCA-C Quats Borates

Table 2
Japan

Industrial preservation						Water treatment				Other applications					
Adhesives and sealants	Antifoulant marine coatings	Metalworking fluids	Paints and coatings	Plastics and resins	Synthetic latex polymers	Cooling water	Oilfield and gas field applications	Paper	Recreational water	Animal biosecurity	Aquaculture	HI&I Cleaning products	Leather tanning	Wood preservation	
BNPD BCM BIT CIT/MIT OIT ZnPT TBZ	Cu ₂ O PK DCOIT ZnPT CuPT TET DCDO	IPBC HTHT Tomicide G HTT BIT CIT/MIT Buty BIT NaPT	DCMU BNPD IPBC Cu ₂ O HTHT BCM BIT CIT/MIT OIT ZnPT TBZ PCMX	Cu ₂ O Quats OBPA DCOIT OIT Butyl BIT TBZ TCC	BNPD BIT CIT/MIT Butyl BIT ZnPT TBZ	BNPD DBDCB DBNPA Quats HTHT WSCP BIT CIT/MIT MBT THPS	HTHT	BNPD BBAB DBNE DBNPA Ammonium bromide HTHT BIT CIT/MIT MBT MECT DCDO THPS	Chloro-isocyanurates Virkon S Quats PCMC Glutaraldehyde	Chloro-isocyanurates Virkon S Quats PCMC Glutaraldehyde	PVP-I Hydrogen peroxide Glutaraldehyde Febantel Praziquantel	Chloro-isocyanurates Sodium hypochlorite Quats Parabens 2-phenoxy-ethanol Triclosan Ethanol Hydrogen peroxide Peracetic acid PHMB	IPBC TBZ TCMTB	IPBC CuO Borates CuAz ACQ Quats Azoles CuO CuN ZnN TBZ MBT TCMTB Creosote oil	

Table 3
India

Industrial preservation						Water treatment				Other applications					
Adhesives and sealants	Antifoulant marine coatings	Metalworking fluids	Paints and coatings	Plastics and resins	Synthetic latex polymers	Cooling water	Oilfield and gas field applications	Paper	Recreational water	Animal biosecurity	Aquaculture	Hospital surface and medical instrument disinfection	HI&I cleaning products	Leather tanning	Wood preservation
BIT CIT/MIT	Cu ₂ O ZPT	Triazines MBM BIT CIT/MIT OIT	IPBC Diuron Benzimidazole BIT CIT/MIT	OBPA	BIT CIT/MI	DBNPA Quats Dithiocarbamate CIT/MIT MBT Glutar-aldehyde	Quats Glutaraldehyde THPS	DBNPA Sodium bromide Quats Dithiocarbamate CIT/MIT	Chloroisocyanurates	Quats Glutaraldehyde	Iodophors Quats	Chloro-phenol PCMC OPP Glutaraldehyde	Quats Chloropheno	Dithio-carbamate TCMTB Chloro-phenol PCMC	CCB CCA Quats

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Table 4
Europe

Industrial preservation						Water treatment				Other applications					
Adhesives and sealants	Antifoulant marine coatings	Metalworking fluids	Paints and coatings	Plastics and resins	Synthetic latex polymers	Cooling water	Oilfield and gas field applications	Paper	Recreational water	Animal biosecurity	Aquaculture	Hospital surface and medical instrument disinfection	Hi&I cleaning products	Leather tanning	Wood preservation
BNPD IPBC BIT CIT/MIT MIT DCOIT Dichlor-fluanid Tolyl-fluanid	Cu ₂ O CuSCN DCOIT Dichlor-fluanid Tolyl-fluanid ZPT	IPBC Oxazo-lidines Triazines CIT/MIT OIT Butyl BIT NPT Glutaraldehyde	BNPD IPBC Oxazo-lidines Triazines BIT CIT/MIT MIT DCOIT OIT Dichlor-fluanid Tolyl-fluanid ZPT	OBPA DCOIT OIT Butyl BIT Fluoro-folpet	BNPD BIT CIT/MIT MIT	BNPD DBNPA Halogenated hydantoin NaBr Carben-dazim Quats THPS Thiones CIT/MIT Glutar-aldehyde	Quats THPS CIT/MIT Glutaraldehyde	BNPD DBNPA Halogenated hydantoin NaBr Quats Polyquats THPS Thiones Dithio-carbamate CIT/MIT MBT TCMTB Glutaraldehyde Peracetic acid	Chloro-isocyanurates Quats Glutaraldehyde Peracetic acid	IPBC Iodophors Quats Glutaraldehyde	IPBC Iodophors Quats Glutaraldehyde	Quats Glutaraldehyde Peracetic acid	Chloro-isocyanurates BNPD PCMC Halogenated hydantoin WSCP Dithio-carbamate BIT CIT/MIT OBPC PCMX/ DCMX PCMC PHMB Glutar-aldehyde Peracetic acid	MBT TCMTB PCMC Glutar-aldehyde	IPBC Borates CCA Quats Azoles Cu-8-Q CuN/ ZnN Cu-HDO PCP

Table 5
United States

Industrial preservation						Water treatment				Other applications					
Adhesives and sealants	Antifoulant marine coatings	Metalworking fluids	Paints and coatings	Plastics and resins	Synthetic latex polymers	Cooling water	Oilfield and gas field applications	Paper	Recreational water	Animal biosecurity	Aquaculture	Hospital surface and medical instrument disinfection	Hi&I cleaning products	Leather tanning	Wood preservation
DBDCB IPBC DIMTS Oxaz-olidines Triazines Dowicil 75 OBPA Folpet BIT CIT/MIT OIT ZPT Thiabendazole OPP Bioban DXN	Cu ₂ O Irgarol 1051 DCOIT ZPT	CPBC Oxaz-olidines Triazines BIT CIT/MIT OIT NPT TCMTB OPP PCMC Glutaraldehyde	Chloro-anthil DBDCB IPBC DIMTS OBPA DCOIT OIT Butyl BIT ZPT Thiabendazole Triclosan Silver	IPBC DIMTS OBPA DCOIT OIT Butyl BIT ZPT Thiabendazole Silver	BNPD DBDCB Oxazolindines Triazines Dowicil 75 BIT CIT/MIT MIT	Chloro-isocyanurates BNPD Halogenated hydantoin NaBr Quats WSCP THPS Dithiocarbamate CIT/MIT MBT Glutaraldehyde	Quats THPS Glutaraldehyde Acrolein	Ammonium bromide BNPD DBNPA NaBr Quats Dithiocarbamates CIT/MIT MBT TCMTB Thiones Glutaraldehyde Peracetic acid	Chloro-isocyanurates Lithium hypochlorite Halogenated hydantoin NaBr Quats WSCP PHMB	IPBC Iodophors Quats Glutaraldehyde Peracetic acid	IPBC Iodophors Quats Glutaraldehyde	Quats Glutaraldehyde Peracetic acid	Chloroisocyanurates Iodophors Quats BIT OPP OBPC Peracetic acid	DIMTS Dithiocarbamates BIT TCMTB	IPBC ACQ ACZA Borates CCA CuN/ ZnN PCP PHMB

Report Contents

1. INTRODUCTION

2. EXECUTIVE SUMMARY

3. PRODUCTS

For each product group listed in the tables, the following overview information is provided:

- Estimated consumption by application in volume and value
- Estimated supplier sales by application in volume and value
- Five-year outlook

4. APPLICATIONS

For each end-use industry listed in the tables, the following information is provided:

- Product usage
- Grades and prices
- Methods and levels of use
- Estimated consumption in volume and value
- Supplier sales
- Channels of distribution
- Major customers
- Market developments
- Regulatory overview
- Outlook
- Appraisal

5. SUPPLIER LANDSCAPE

- Supplier sales overview and summary by product type
- Supplier sales overview and summary by application

6. SUPPLIER PROFILES

For a more detailed Table of Contents, please contact your Client Relations Manager.

Specialty Biocides 2008 Global Series: Market Analysis and Opportunities

Methodology

Kline is unmatched in our ability to gather hard-to-get market and competitive intelligence with a high degree of confidence. Kline's market analysis approach places the principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable.

During the course of field research, Kline's professional staff of industry experts conducted in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including leading consumers of specialty biocides; leading manufacturers, formulators, and marketers of specialty biocides; and pertinent government agencies and trade associations. This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities.

Primary research represents the bulk of our research efforts, supplemented by secondary research drawn from a review of suppliers' product literature and price lists; a search of recent trade and technical literature; and Internet sources.

Forecasts in this report are generated with Kline's FutureView analytical forecasting tool. With the enhanced forecasts, subscribers can see how adjustments in the assumptions behind the forecasts can bring about different outcomes.

Kline Credentials

Kline is a worldwide consulting and research firm dedicated to providing the kind of insight and knowledge that helps companies find a clear path to success. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for nearly 50 years.

Kline's research and consulting services extend across the entire Chemicals industry value chain. Our solutions have helped clients develop better ways to create and profit from new business opportunities, respond to competitive and economic threats, improve productivity, achieve sustainable growth, and optimize performance. Kline provides clients with facts, forecasts, and recommendations based solidly on the realities of the market.

Our market research reports and services are designed to provide subscribers with a deeper understanding of their markets, an outlook for their business, and accurate information about their competitors. Our clients tell us they often use Kline's market research to validate their own internal analysis, and many clients rely on Kline reports as their most critical source of information.

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- Specialty Biocides: A Global Series of Regional Market Analyses, Second Edition
- Specialty Biocides: A Global Series of Regional Market Analyses, First Edition
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