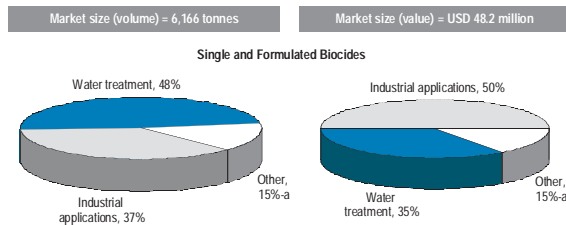


Specialty Biocides 2008: India Market Analysis and Opportunities

Fact Sheet

The Market

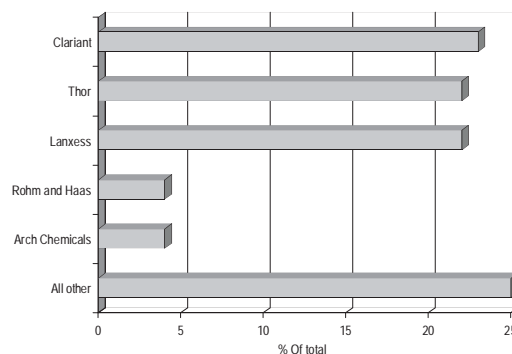
Strong growth within the Indian biocides market continues into 2008 and beyond. In 2007, the total biocide market for single actives and formulated products was USD 48.2 million in revenues, with market volumes of 6,166 tonnes. Water treatment is the leading (volume) application group for both single and formulated biocides in India.



a- Other applications includes animal biosecurity, aquaculture, wood preservation, H&I cleaning products, hospital surface and medical instrument disinfection, and leather tanning.

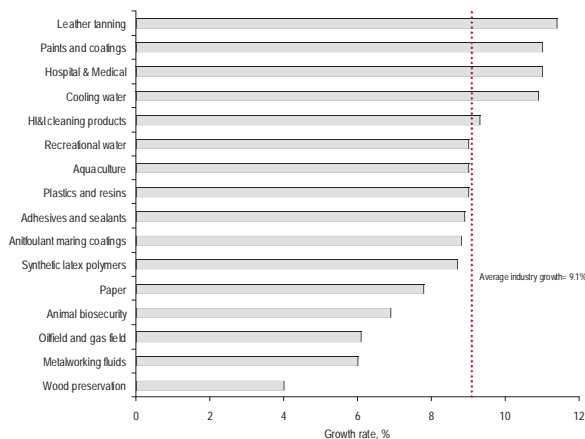
Companies

The supplier base for biocidal actives is dominated by multinational companies, with very few local suppliers. These local firms mainly specialize in the production of quats. The supply of other chemistries is dominated by the multinational players.



Products

Antifoulant marine coatings consume the greatest volume of biocides within industrial preservation applications. Cooling water consumes the greatest volume and value of biocides within water treatment applications. Wood preservation accounts for 31% of the volume, followed by animal biosecurity; however, growth of these markets are below industry average.



Future Outlook

GDP growth in India has started to flatten out at around the 9% level; however, GDP growth continues to out pace developed markets, falling slightly behind China. Services remain the biggest contributor to GDP; however, agriculture contributes a significant proportion in contrast to other regions.

