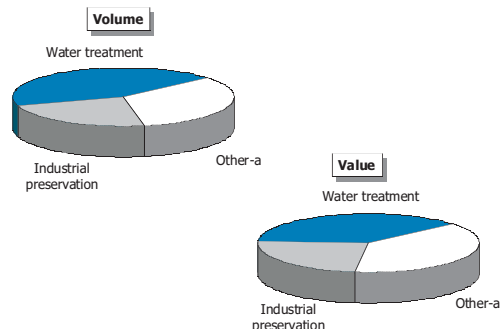


# Specialty Biocides 2008: Europe Market Analysis and Opportunities

## 2008 Fact Sheet

### The Market

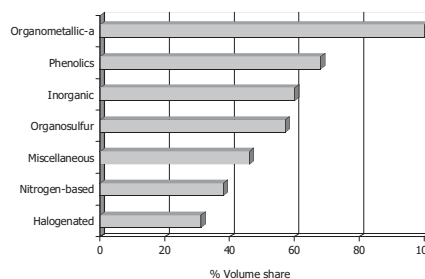
In 2008, the specialty biocide market exceeded €550 million, with market volumes in excess of 110,000 tonnes. Water treatment is the leading application group in Europe on a volume basis, whereas industrial preservation applications is the leading application on a value basis.



a- Includes animal biosecurity, aquaculture, wood treatment, household, industrial and institutional cleaning products, hospital surface and medical instrument disinfection, and leather tanning.

### Companies

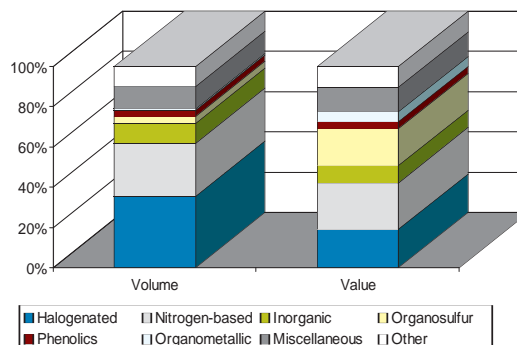
The supplier base for specialty biocides is dominated by multinational companies, with leading players focused by chemistry or application. Phenolics is the most consolidated market with the leading three players accounting for 68% market share.



a- Includes others.

### Products

Biocides used within recreational water, including chloroisocyanurates and nitrogen based biocides, have the highest consumption in Europe. Another major application which influences biocide consumption is household, industrial and institutional cleaning products.



### Future Outlook

The European specialty biocides market has been impacted by the economic downturn with industrial applications worse affected. Since 2005 growth across most markets have tracked or slightly exceeded GDP, however from 2008 to 2013 a probable case scenario predicts average growth of 2.7% with a worse case scenario predicting average growth of 0.9%.

