

Specialty Biocides 2010:

Brazil Market Analysis and Opportunities

Published September 2010

Base Year: 2009

A supplementary report to our global series of regional market analyses on specialty biocides. This program is specifically designed to assist suppliers and formulators and those looking to enter the Brazilian market, addressing such questions as:

- What is the consumption in both volume and value of specialty biocides by product type and application in Brazil?
- What is the growth potential for specialty biocides to 2014, and what is driving growth?
- What are the key challenges, growth drivers, and market restraints influencing this market at present and long term?
- Is there a shift occurring from commodity to specialty biocides?
- How important are formulations, and what is the role of the formulator in this market?
- Who are the leading suppliers of specialty biocides in Brazil by product type and application?

Report Scope

Specialty Biocides 2010: Brazil Market Analysis and Opportunities provides a detailed, independent appraisal of the Brazilian market, including current and forecast demand by major biocide product group. Biocide consumption and forecasts provided for 16 end-use industries. Product selection criteria, distribution channels, and formulation usage are also assessed.

Biocides included within this report are grouped into five main categories:

- Halogenated
- Organosulfur
- Nitrogen-based
- Inorganic
- Miscellaneous

A global Executive Summary contains top-line data on the United States, Europe, Japan, China, and India and provides a global context for the Brazilian market.

Biocide consumption and forecasts are provided for 16 end-use industries. Product selection criteria, distribution channels, and formulation usage are also assessed. The base year for the study is 2009, with forecasts to 2014.

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 provides subscribers with:

- A reliable and independent assessment of the Brazilian biocides market, enabling each subscriber to understand the key dynamics in which this market operates
- Top-line market data on other key biocide-consuming regions to provide context to companies assessing opportunities within Brazil
- An assessment of key growth areas by product and application 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

Report Contents

1. INTRODUCTION

2. EXECUTIVE SUMMARY

3. PRODUCT OVERVIEW

- Commodity biocides:
- Overview of:
 - Chlorine
 - Hydrogen peroxide
 - Sodium hypochlorite
- Specialty biocides
 - Estimated consumption by application
 - Estimated supplier sales by application
 - Five-year outlook

4. APPLICATIONS

For each end-use industry listed in Table 2, 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
- Appraisal and outlook

5. REGULATORY OVERVIEW

- Key regulatory body
- Regulations by each application type regarding biocide consumption

6. SUPPLIER LANDSCAPE

- Supplier sales overview and summary by application

7. SUPPLIER PROFILES

Ten biocides suppliers are profiled.

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Table 1: List of Specialty Biocides Covered by Product Class

Biocide class	Products covered
Halogenated	<ul style="list-style-type: none"> ■ 1,2-Dibromo-2,4-dicyanobutane (DBDCB) ■ 2,2-Dibromo-3-nitropropionamide (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 ■ 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'-Trichlorocarbaniide (triclocarban) ■ o-Benzo-p-chlorophenol (OBPC) ■ o-Phenylphenol (OPP) ■ Pentachlorophenol (PCP) ■ Phenoxyethanol ■ p-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)
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)
Miscellaneous	<ul style="list-style-type: none"> ■ Glutaraldehyde ■ Peracetic acid ■ Polyhexamethylene biguanide hydrochloride

Table 2: Application Segments Covered by the Report

Industrial preservation	Water treatment	Other-a
<ul style="list-style-type: none"> ■ Adhesives and sealants ■ Antifoulant marine coatings ■ Metalworking fluids ■ Paints and coatings (in-can and dry-film) ■ Plastics and resins ■ Synthetic latex polymers 	<ul style="list-style-type: none"> ■ Cooling water ■ Paper ■ Oil and gas ■ Recreational 	<ul style="list-style-type: none"> ■ Animal biosecurity-a ■ Aquaculture-a ■ Civil construction ■ Cosmetics ■ HI&I cleaning products ■ Leather ■ Hospital and medical-a ■ Mineral slurries ■ Wood preservation

a- Data included within the HI&I cleaning products chapter; however, separate chapters for animal biosecurity are available containing qualitative insights.

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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 will conduct 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

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