

Specialty Biocides 2011:

Russia Market Analysis and Opportunities

To Be Published 2nd Quarter 2012

Base Year: 2011

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

- What is the consumption in both volume and value of specialty biocides by product type and application in Russia?
- What is the growth potential for specialty biocides to 2016, 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?
- Who are the leading suppliers of biocide actives in Russia by product type and application?
- What are the major formulations being used, and how important is the role of formulators in this market?

Report Scope

Specialty Biocides 2011: Russia Market Analysis and Opportunities will provide a detailed independent appraisal of the Russian market, including current and forecast demand by major biocide product group. Biocide consumption and forecasts will be provided for 16 end-use industries. Product selection criteria, distribution channels, and formulation usage will also be assessed.

The base year for the study will be 2011, and the study will include forecasts to the year 2016.

Key Benefits

This report will assist 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 will also serve as an invaluable tool in the strategic planning process.

The report will provide subscribers with:

- A reliable and independent assessment of the Russian biocides market, enabling each subscriber to understand the key dynamics in which this market operates
- An assessment of key growth areas by product and application 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

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Tentative Report Contents

1. INTRODUCTION

2. EXECUTIVE SUMMARY

3. PRODUCT OVERVIEW

For each product category listed in Table 1, the following overview information will be 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 Table 2, the following information will be 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
- Five-year outlook and forecast rationale
- Appraisal

5. REGULATORY OVERVIEW

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

6. COMMODITY BIOCIDES

- Overview of key products, including chlorine, formaldehyde, and hydrogen peroxide
- Trends towards specialty biocides

7. SUPPLIERS OVERVIEW

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

8. SUPPLIER PROFILES

Ten biocides suppliers will be profiled. Charter subscribers will have input into the firms to be included in the final report.

Table 1: Products Covered in the Report

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 hydantoin 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'-Trichlorocarbanilide (triclocarban) Benzo-p-chlorophenol (OBCP) 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

NOTE: Subject to charter subscriber input.

Table 2: End-Use Industries Covered in the Report

Industrial preservation	Water treatment	Other applications
<ul style="list-style-type: none"> Adhesives and sealants Antifoulant marine coatings Metalworking fluids Paints and coatings 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 Aquaculture HI&I cleaning products Leather Wood preservation

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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 will represent 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 will be 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 over 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.

For more information about this study or Kline's other services, e-mail us at sales@klinegroup.com, visit our website at www.KlineGroup.com, or contact us at any of our regional offices listed below.

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- Specialty Biocides: A Global Series of Regional Market Analyses
- Specialty Raw Materials for Cosmetics & Toiletries Global Series
- Specialty Biocides: Mexico Market Analysis and Opportunities