



# Specialty Biocides: Emerging Markets Analysis and Opportunities

To Be Published 3rd and 4th Quarters 2014

Base Year: 2013

Forecasts to 2018

**Regional Coverage:** Brazil ■ The Middle East ■ Southeast Asia

While the key historical European and U.S. markets for specialty biocides are maturing, emerging markets has been an important growth area for global suppliers of specialty biocides. Complementing the reports published in 2013 about the Chinese, European, Indian, and U.S. markets, Specialty Biocides: Emerging Markets Analysis and Opportunities covers the consumption and supply of over 100 specialty biocides in 19 major end-use applications in three regions of high interest due to their growth potential: Southeast Asia, the Middle East, and Brazil.

## This Report Will Help Subscribers to:

- What are the sales of biocides by supplier and end-use application in each region?
- Which suppliers are active in key applications, and which biocides are they supplying?
- What are the average prices of various biocides by application?
- Who are the key customers in each application by region?
- What are the main formulated products used in each applications, and what is their consumption?
- What is the forecast consumption in 2018 by application and biocide?

## Tentative Report and Database Contents\*

*Specialty Biocides: Emerging Markets Analysis and Opportunities* comes as a concise report per region considered and includes a fully interactive database that allows users to customize views according to supplier, biocides, and application.

A concise qualitative report addressing pertinent market issues, challenges, and opportunities for water treatment, oil and gas, and wood preservation segments is included. The industrial preservation and hygiene will include reports as in detail as per subsegment.

### Concise Reports Content:

- Macro-economic data about the end-use industry
- Regulatory issues
- Products grades and prices
- Key customers overview
- Consumption by active biocidal ingredient
- Channels of distributions
- Competitive landscape
- Product formulation analysis: types of formulation used and estimated consumption
- Trends affecting the biocides market in the considered applications and market development

\* Subject to charter subscriber input





## Scope

Specialty Biocides: Emerging Markets Analysis and Opportunities will provide an independent appraisal of this complex market and explore market opportunities and challenges for manufacturers of specialty biocides. The results of the study are presented in two complementary tools: an interactive database and concise written reports for each end-use application considered.

Databases data includes:

- Total segment volume and value
- Split by region/country
- Split by product type/product category/product (active ingredient)
- Split by suppliers
- Forecast consumption of biocides (2014-2018)

Products coverage includes over 100 specialty biocides in total (Table 2). Their consumption and supply will be analyzed in 19 major end-use applications (Table 3).

## Key Benefits

This report will assist material suppliers in identifying opportunities within the global biopolymer industry. It will also serve as an invaluable tool in the strategic planning process.

- Develop business strategies by understanding the trends and developments that are driving the global biopolymers market
- Design your product development, marketing and sales strategies
- Develop market-entry and market expansion strategies
- Identify key companies best positioned to take advantage of emerging market opportunities



**Table 1: Countries Included in the Scope of the Reports**

Middle East	Southeast Asia
Bahrain	Brunei
Egypt	Cambodia
Iraq	East Timor
Israel	Indonesia
Jordan	Laos
Kuwait	Malaysia
Lebanon	Myanmar
Oman	Philippines
Qatar	Singapore
Saudi Arabia	Thailand
Syria	Vietnam
United Arab Emirates	
Yemen	

**Table 2: Product Segmentation**

Major product group	Examples include:
<b>HALOGENATED BIOCIDES</b>	
1. Chlorinated	Chloroisocyanurates Chloroethanol Lithium hypochlorite, etc.
2. Brominated	Sodium bromide DMDM hydantoin 2-Bromo-2-nitropropane-1,3-diol (BNPD), etc.
3. Iodine-based	Iodophors 3-Iodo-2-propynylbutyl carbamate (IPBC), etc.
<b>INORGANIC BIOCIDES</b>	
	Cuprous oxide (Cu <sub>2</sub> O) Chromated copper arsenate (CCA) Copper Hydroxide (Cu(OH) <sub>2</sub> ) Borates, etc.
<b>NITROGEN-BASED BIOCIDES</b>	
	Quaternary ammonium compounds (quats) Triazines Tetrakis(hydroxymethyl) phosphonium sulfate (THPS), etc.
<b>PHENOLIC BIOCIDES</b>	
	Pentachlorophenol (PCP) Phenoxyethanol o-Benzo-p-chlorophenol (OBCP), etc.
<b>ORGANOMETALLICS BIOCIDES</b>	
	Copper naphthenate (CuN) Copper thiocyanate (CuSCN) Bis-(N-cyclohexyldiazoniumdioxo)-copper (Cu-HDO) 10,10'-Oxybisphenoxarsine (OBPA), etc.
<b>ORGANOSULFUR BIOCIDES</b>	
1. Isothiazolinones	5-Chloro-2-methyl-4-isothiazolin-3-one and 2-methyl-4-isothiazolin-3-one (CIT/MIT) 1,2-Benzisothiazolin-3-one (BIT), etc.
2. Pyrithiones	Zinc-2-pyridinethiol-2-oxide (ZPT) Sodium-2-pyridinethiol-2-oxide (NPT), etc.
3. Thiocyanates	Methylenebis(thiocyanate) (MBT) 2-(Thiocyanomethylthio) benzothiazole (TCMTB), etc.
<b>MISCELLANEOUS BIOCIDES</b>	
	Polyhexamethylene biguanide (PHMB) Glutaraldehyde Peracetic acid, etc.

NOTE: Examples only, the database contains over 100 specialty biocides.

**Table 3: Application Segmentation**

Hygiene	Agriculture	Industrial Preservation	Adhesives and sealants	Oil and gas	Production	Wood preservation	Residential
	Aquaculture		Antifoulant marine coatings		Storage		Industrial (marine poles/pillings)
	Cleaning products		Leather		Transmission		
				Metalworking fluids	Water treatment	Cooling water	
	Hospital		Paints and coatings	Paper			
	Plastics and resins	Recreational water					
	Instruments disinfection	Synthetic latex polymers					



## Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 50-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

### Primary Research

#### We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Distributors
- Government agencies
- Marketers/manufacturers
- Retailers
- Suppliers
- Trade organizations

### Secondary Research

#### We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/ industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

### Comprehensive Market Intelligence

#### We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence procurement and assessment, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

## Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. 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.

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