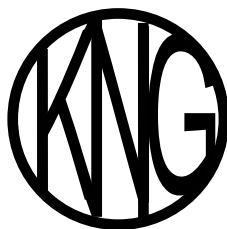

ASIAN COATING BIOCIDES

2008-2013

A Multiclient Study

NOW AVAILABLE

May, 2009



KUSUMGAR, NERLFI & GROWNEY, INC.
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BIOCIDE GROWTH LED BY CHINA & INDIA

Coating biocide consumption in Asia was some 30 MM lb, as supplied, worth \$174 MM in 2008. Growth, led by China and India, is placed at 9%/yr through 2013. In-can preservatives and dry film fungicide consumption was some 23 MM lb worth \$97 MM and is growing 9%/yr. Over 90% of these biocides are consumed in WB architectural paints. Growth in architectural paints will be down significantly in 2009 owing to slumping economies. Marine fungicide consumption, excluding cuprous oxide, was 7.3 MM lb worth \$77 MM in 2008 and an 8% annual rate of growth is forecast. Shipbuilding activity is forecast to remain strong the next couple of years, but the recent drop-off in global ship orders will cause marine biocide growth to slow in the latter part of our five year forecast. Table 1 summarizes coating biocide consumption in Asia by function.

Table 1					
BIOCIDES IN ASIA BY FUNCTION, IN MILLIONS					
Function	2008		2013		AGR
	LB	\$	LB	\$	
In-Can Preservatives	15.6	41	23.7	62	9
Dry Film Fungicide	7.5	57	11.7	89	9
Marine Fungicide	7.3	76	10.9	112	8
TOTAL	30.4	174	46.3	263	9

THE STUDY

ASIAN COATING BIOCIDES characterizes consumption for base year 2008 and provides projections to the year 2013. The report gives a comprehensive analysis of coating biocide consumption in China by function, type, and end use. Growth rates, trends, recent developments, biocide supplier structure, pricing, and applications are assessed.

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OUR QUALIFICATIONS

Kusumgar, Nerlfi & Growney is a consulting firm specializing in market research and business analysis for the polymer and chemical industries. Members of the firm possess some 70 years of experience analyzing the coating, ink, and adhesive & sealant industries. Kusumgar, Nerlfi & Growney is dedicated to providing comprehensive and accurate information and insight on technology driven markets.

The information and analyses contained in **ASIAN COATING BIOCIDES** was developed by Michael Growney, Minesh Kusumgar and Steven Nerlfi. No outside contractors were employed. Our expertise has been gained from conducting over 35 multiclient and numerous proprietary studies.

ADDITIONAL SERVICES

Kusumgar, Nerlfi & Growney's current multiclient project is **GLOBAL COATING & INK ADITIVES**. The study will provide subscribers with detailed information on five leading additive types consumed in coatings and inks. Significant trends, regulatory implications, technology, and mergers and acquisitions will be covered in detail.

Our recently completed studies include **ASIAN PAINT & COATINGS (2007-2012)** and **ASIAN ADHESIVES & SEALANTS (2008-2013)**. Interested parties are invited to contact Kusumgar, Nerlfi & Growney for brochures and additional information. Brochures can be obtained at www.kusumgar-nerlfi-growney.com. We welcome inquires for projects of a proprietary nature.

SUBSCRIPTION INFORMATION

ASIAN COATING BIOCIDES is available through subscription. The price of the study is \$1,500 for one single use electronic copy (PDF) of the report. A corporate use license is available for \$4,500. To subscribe, please complete and sign the contract on the following page and return to Kusumgar, Nerlfi & Growney. For additional information please call Kusumgar, Nerlfi & Growney at 973/439-0030 (FAX: 973/439-0031) or e-mail us at nerlfikng@cs.com.

CONTRACT FOR ASIAN COATING BIOCIDES

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21 Pine Street
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Please initiate our participation in **ASIAN COATING BIOCIDES**. We understand our subscription entitles us to one single use electronic copy (PDF) of the final report.

We agree that for a period of three years from publication to:

1. Not reproduce the study, in whole or in part, by any means.
2. Restrict use of the study to our own employees.
3. Prevent the disclosure of its contents, to the best of our ability, to any other firm or person.

We understand that we may disclose the contents of this study to any firm that we own more than half of, or to a company that maintains more than a half interest in our firm. We may use or disclose any information in the study which is public knowledge, in our possession before receiving the report, or that has been obtained from third parties, but not from this study.

Kusumgar, Nerlfi & Growney will take reasonable precautions to prevent disclosure of the contents of this study, except to subscribers, for a period of three years after it is issued.

We understand the fee for **ASIAN COATING BIOCIDES** is \$1,500.

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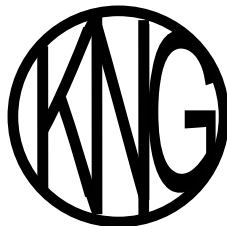
POLYMER AND CHEMICAL BUSINESS ANALYSIS AND MARKET RESEARCH

ADDITIONAL SERVICES

ASIAN COATING BIOCIDES is Kusumgar, Nerlfi & Growney's seventeenth multiclient study. Studies immediately available, or scheduled for completion, include:

- **ADHESIVES IN DEVELOPING REGIONS**, December 2003
- **ADDITIVES, 2003-2008**, September 2004
- **THE ASIAN COATINGS INDUSTRY**, September 2005
- **RADIATION-CURED PRODUCTS, 2005-2010**, July 2006
- **THE U.S. PAINT & COATINGS INDUSTRY, 2006-2011**, September 2007
- **ASIAN COATING ADDITIVES**, May 2008
- **ASIAN PAINT & COATINGS**, September 2008
- **ASIAN ADHESIVES & SEALANTS**, March 2009
- **GLOBAL COATING & INK ADDITIVES**, due year-end 2009

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