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# Global Industrial & Institutional Cleaning Chemicals

May 2022



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# About This Report

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## Scope

This report forecasts to 2026 global demand for industrial and institutional (I&I) cleaning chemicals by product, market, and major world region in nominal US dollars at the manufacturer level. Product segments include:

- general purpose cleaners
- floor care products
- disinfectants and sanitizers
- vehicle care products
- warewashing products
- laundry care products
- other products such as furniture polishes, glass and oven cleaners, and grease trap solvents and drain openers

Reported markets encompass:

- commercial
- manufacturing
- institutional and governmental

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, product, market, and regional demand (including product and market segments) are provided for 2011, 2016, and 2021.

For the purposes of this report, the term “I&I cleaning chemicals” describes chemicals used in cleaning products designed for use in the commercial, manufacturing, institutional, and government markets. Excluded from coverage in this report are all household cleaning products and consumer car wash products.

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate as that prevailing in 2020.

Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Global Industrial & Institutional (I&I) Cleaning Chemicals (FW35052)* is based on a [comprehensive industry study](#) published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

**Table 9 | NAICS & SIC Codes Related to I&I Cleaning Chemicals**

NAICS/SCIAN 2017 North American Industry Classification System		SIC Standard Industrial Classification	
325199	All other basic organic chemical manufacturing	2841	Soap and other detergents, except specialty cleaners
325611	Soap and other detergent manufacturing	2842	Specialty cleaning, polishing, and sanitation preparations
325612	Polish and other sanitation good manufacturing	2869	Industrial organic chemicals, not elsewhere classified
		3291	Abrasive products
		5169	Chemicals and allied products, not elsewhere classified

Source: US Census Bureau

**Table 10 | NACE Codes Related to I&I Cleaning Chemicals**

NACE Code	Definition
20.41	Manufacture of soap and detergents, cleaning and polishing preparations
20.59	Manufacture of other chemical products NEC

Source: European Commission

**Table 11 | HS Codes Related to I&I Cleaning Chemicals**

HS Code	Definition
1520	Glycerol
3401	Soap
3402.20	Washing and cleaning preparations for retail sale
3402.90	Washing and cleaning preparations not for retail sale
3404	Waxes; artificial, prepared
3405	Polishes, creams, scouring pastes, powders and similar; in any form, (including articles impregnated, coated or covered with such), for furniture, footwear, floors, coachwork, glass or metal
3808.94	Disinfectants; other than containing goods specified in Subheading Note 1 in this Chapter; put up in forms or packings for retail sale or as preparations or articles

Source: United Nations Statistics Division

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of

determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

*Global Industrial & Institutional (I&I) Cleaning Chemicals*

### Freedonia Industry Studies

*Carpets & Rugs*

*Disposable Medical Supplies*

*Foodservice Single-Use Products in the US*

*Global Carpets & Rugs*

*Global Disposable Masks & Respirators*

*Global Disposable Medical Gloves*

*Global Disposable Medical Supplies*

*Global Flooring*

*Global Food Processing Machinery*

*Global Foodservice*

*Global Foodservice Single-Use Products*

*Global Hard Surface Flooring*

*Global I&I Disinfectants & Sanitizers*

*Global Medical Face Shields*

*Global Water Treatment Equipment & Chemicals*

*Hard Surface Flooring*

*Industrial & Institutional Cleaning Chemicals*

*Surface Disinfectant Wipes*

*Wipes*

### Freedonia Focus Reports

*Global Foodservice Single-Use Products*

*Restaurants & Foodservice: Canada*

*Restaurants & Foodservice: Europe*

### Freedonia Custom Research

### Trade Publications

*Cleaning and Maintenance*

*Cleaning and Maintenance Management*

*CleanLink*

*European Cleaning Journal*

*Tomorrow's Cleaning*



## Agencies & Associations

American Cleaning Institute

Eurostat

International Monetary Fund

International Sanitary Supply Association

Organisation for Economic Co-operation and Development

United States International Trade Commission

World Bank