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# Global I&I Disinfectants & Sanitizers

May 2020



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# About This Report

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## Scope

This report forecasts to 2020 and 2024 global demand for industrial and institutional (I&I) disinfectants and sanitizers by market and major world region in nominal US dollars at the manufacturer level. Reported markets encompass:

- food and beverage manufacturing
- healthcare
- foodservice
- other markets, such as nonfood manufacturing, retail stores, and hotels and lodging

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

To illustrate historical trends, world, market, and regional demand (including market segments) are provided for 2015-2019.

This report analyzes the global market for I&I disinfectants and sanitizers:

- Disinfectants are products used on hard surfaces for the near elimination of bacteria, viruses, and other pathogens.
- Sanitizers lower but do not eliminate the number of infectious pathogens on a surface.

Many chemicals can be described as either disinfectants or sanitizers, depending on the length of surface exposure. Hand sanitizers are included in this report.

Excluded from this report are:

- products for skin preparation prior to surgery or other medical procedures
- sanitizers for medical instruments
- disinfectants and sanitizers used for cleaning laboratory testing and other specialized healthcare equipment

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 Disinfectants & Sanitizers* (FW35118) is based on a [comprehensive industry study](#) published by The Freedonia Group. Reported findings

## About This Report

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
- intergovernmental and non-governmental organizations
- 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 8 | NAICS & SIC Codes Related to I&I Disinfectants & Sanitizers

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		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
		5169	Chemicals and allied products, not elsewhere classified

Source: US Census Bureau

Table 9 | HS Codes Related to I&I Disinfectants & Sanitizers

HS Code	Definition
1520	Glycerol
3401	Soap
340220	Washing and cleaning preparations for retail sale
340290	Washing and cleaning preparations not for retail sale
380894	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) Disinfectants & Sanitizers: COVID-19 Impact Analysis*

### Freedonia Industry Studies

*Disposable Medical Supplies in the US*

*Global Disposable Masks & Respirators: COVID-19 Impact Analysis*

*Global Disposable Medical Gloves: COVID-19 Impact Analysis*

*Global Disposable Medical Supplies*

*Global Industrial & Institutional Cleaning Chemicals*

*Global Pharmaceutical Packaging*

*Global Protective Packaging*

*Global Nonwovens*

*Global Water Treatment Equipment & Chemicals*

*Industrial & Institutional (I&I) Cleaning Chemicals in the US*

*Medical Device Packaging*

*Pharmaceutical Packaging*

*Pouches in the US*

*Wipes*

### Freedonia Focus Reports

*COVID-19 Market Impact Analysis*

*Deathcare: United States*

*Demographics: United States*

*Disposable Medical Supplies: United States*

*Electronic Health Records: United States*

*Global Demographics*

*Global Healthcare*

*Healthcare Insurance: United States*

*Healthcare: United States*

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*Tomorrow's Cleaning*

### **Agencies & Associations**

Advanced Medical Technology Association

American Cleaning Institute

American Hospital Association

American Medical Association

Chinese Medical Association

European Medical Association

Eurostat

International Monetary Fund

International Sanitary Supply Association

Organisation for Economic Co-Operation and Development

United States Census Bureau

United States Department of Health and Human Services

United States International Trade Commission

World Bank

World Health Organization