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# Industrial & Institutional Cleaning Chemicals

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US Industry Study with Forecasts for **2012 & 2017**

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Study #2396 | August 2008 | \$4700 | 314 pages

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*I&I cleaning chemicals that are effective, easy to use and safer for the environment have the best prospects, including smaller volume formulations using biodegradable components.*

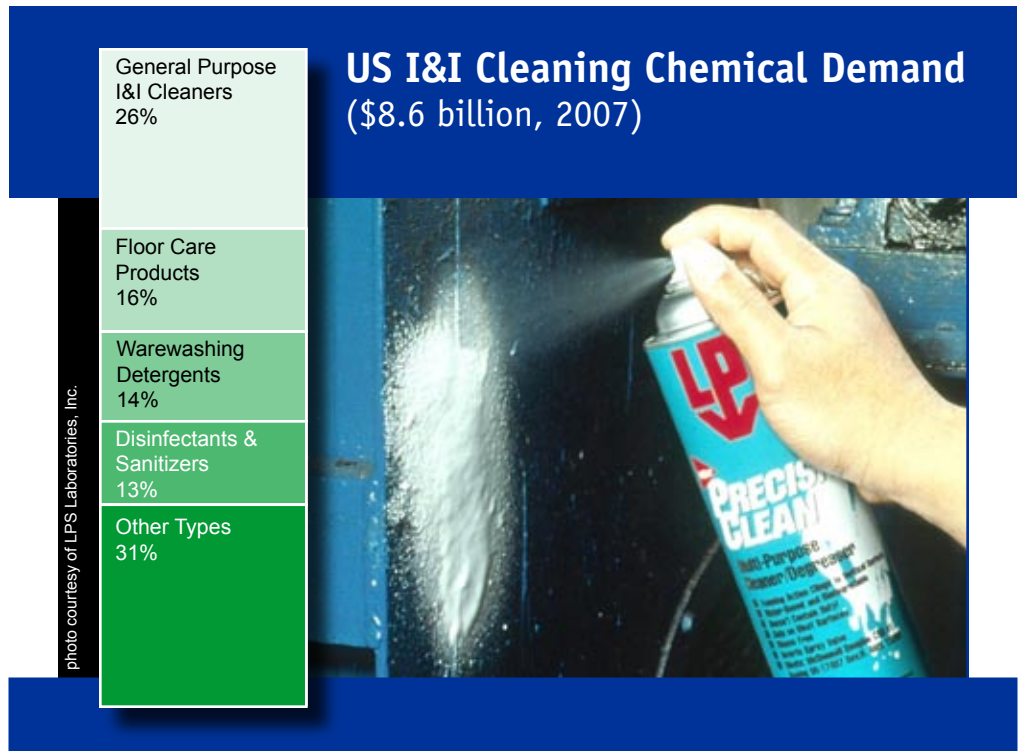
## US demand to grow 3.4% annually through 2012

US demand for industrial and institutional (I&I) cleaning chemicals is projected to increase 3.4 percent annually to more than \$10 billion in 2012. Prospects will be best for products that offer effective performance properties, ease of use and favorable environmental profiles. Novel formulations incorporating plant-derived raw materials and other biodegradable components will register above average growth, but will remain a relatively small segment of the market.

## Food-related markets to benefit from safety concerns

Outbreaks of illnesses caused by poor hygiene and sanitation practices in restaurants, as well as widely reported instances of contaminated ground beef, tomatoes, jalapeño peppers, spinach and other food items will drive demand for I&I cleaners in facilities that handle and serve food products. Growth is expected to be strong for hard surface disinfectants, general purpose cleaners, hand cleansers and other products used to ensure product and worker safety in food and beverage processing facilities - by far the largest manufacturing market for I&I cleaning products -- and in foodservice applications, the dominant commercial market.

The commercial and manufacturing segments, which combined to account for more than 85 percent of the I&I



market in 2007, are expected to register growth comparable to the overall average. The smaller institutional segment is projected to post stronger advances, due mainly to sustained growth in health care applications, the largest institutional market. Aggressive surface cleaning, equipment disinfection, floor care and other janitorial operations will continue to expand in order to assure patient safety and to minimize health care facility liabilities resulting from subpar infection control procedures.

## Several trends reshaping raw material usage

Many product formulators are moving away from harsher caustic soda in favor

of more benign chlor-alkalis such as soda ash and sodium bicarbonate that allow for milder, easier to use products with greener environmental profiles. Efforts to save water, packaging costs and logistical expenses have boosted demand for better performing surfactants in laundry detergents, which allow them to operate effectively with reduced water content. Although there is disagreement about the effectiveness and possible consequences of using cleaning products with antimicrobial additives such as triclosan, end users continue to gravitate to them, in part because consumers feel that they offer additional protection from bacteria and other microbial threats.

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## Sample Text, Table & Chart

### RAW MATERIALS

#### Surfactants

Demand for surfactants in I&I cleaning products is expected to increase less than one percent in 2008. In 2007, demand was modest, this represents above average growth. Material price gains will be driven by trends in raw materials, new formulas and greater use of specialty surfactants. Demand for some traditional raw materials such as caustic soda and solvents.

**SAMPLE  
 TEXT**

Formulators of cleaning products increasingly look to specialty suppliers for innovative, unique and cost-effective chemicals that allow them to gain a competitive advantage in emerging product categories, such as no-rinse disposable wipe cleaners and laundry detergent tablets. The best opportunities are expected for surfactants with multiple benefits, including low foaming characteristics and enhanced cleaning action. Further advances will be moderated by environmental and health concerns and related legislation. As a result, much research and development is focused on biodegradability issues and possible health effects.

In an effort to contain costs, cleaning product manufacturers are seeking to reduce supply chain costs by streamlining formulations. Consequently, the trend is toward reducing the total number of surfactants and increasing use of those which provide multiple benefits and allow formulators to differentiate their products. Benefits of multifunctionality include reduced costs, improved efficiency, cleaner labels, and fewer environmental and regulatory issues. In the past, use of common surfactant platforms dominated the I&I cleaning industry, with formulators differentiating their product with the use of additives. More recently, a shift toward unique formulations featuring specialty surfactants or surfactant blends has emerged. At the same time, speed to market has become more important as suppliers of finished products strive for an edge in the

179

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TABLE IV-1

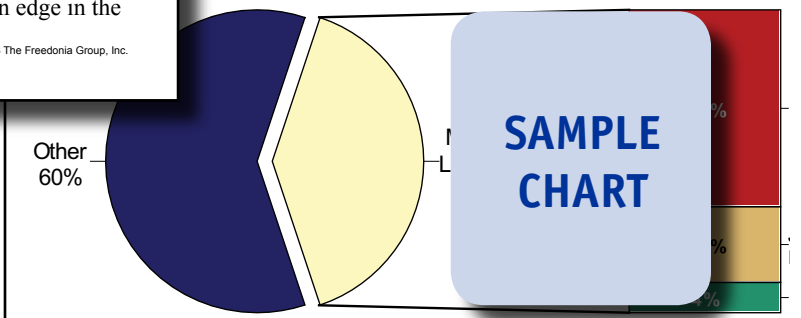
I&I CLEANING CHEMICAL DEMAND BY TYPE  
 (million dollars)

Item	1997	2002	2007	2012	2017
Gross Domestic Product (bil 2000\$)	10	12	14	16	18
\$ I&I chems/000\$ GDP	0.5	0.5	0.5	0.5	0.5
I&I Cleaning Chemicals (mil 2000\$)	5	6	7	8	9
price deflator (2000=100)	100	100	100	100	100
I&I Cleaning Chemical Demand	0	0	0	0	0
General Purpose I&I Cleaners	0	0	0	0	0
Floor Care Products	0	0	0	0	0
Warewashing Detergents	0	0	0	0	0
Disinfectants & Sanitizers	0	0	0	0	0
Laundry Care Products	0	0	0	0	0
Vehicle Wash Products	0	0	0	0	0
Hand Cleansers	0	0	0	0	0
Other Cleaning Chemicals	0	0	0	0	0

**SAMPLE  
 TABLE**

CHART VI-1

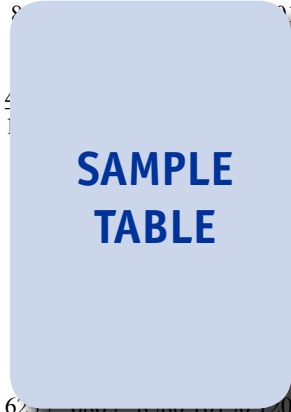
CLEANING CHEMICAL MARKET SHARE, 2007  
 (\$8.6 billion)



## Sample Profile, Table & Forecast

**TABLE III-2**  
**COMMERCIAL MARKETS FOR I&I CLEANING CHEMICALS**  
 (million dollars)

Item	1997	2002	2007	2012	2017
Nonresidential Bldg Space (bil sq ft)	8	8	8	8	8
\$ I&I/000 sq ft					
Commercial I&I Cleaning Chemicals	4	4	4	4	4
Foodservice					
Laundry & Dry Cleaning					
Retail					
Car Washes					
Offices					
Hotels & Lodging					
Transportation & Distribution					
Other					
% commercial					
I&I Cleaning Chemical Demand	625	600	650	675	700



**COMPANY PROFILES**

**Church & Dwight Company Incorporated**  
 469 North Harrison Street  
 Princeton, NJ 08543  
 609-683-5900  
 http://www...

**SAMPLE PROFILE**

Sales: \$  
 US Sales  
 Employr

Key Pro... carbonate and potassium  
 bicarbon... ed cleaning and  
 deodoriz... media

Church & Dwight Company specializes in developing uses for sodium bicarbonate and related products. The Company operates in three business segments: Consumer Domestic, Consumer International and Specialty Products.

The Company participates in the US industrial and institutional (I&I) cleaning chemicals sector via the Specialty Products segment, which generated 2007 sales of \$259 million. Through this segment, Church & Dwight produces specialty chemicals, specialty cleaners and animal nutrition products. Additionally, certain consumer cleaners from the Consumer Domestic and Consumer International segments are available in industrial-strength formulations, including specific formulations marketed under the ORANGE CLEAN, ORANGE GLO, OXICLEAN, KABOOM, OXIWASH and BRILLO brand names.

Church & Dwight maintains a licensing agreement with Disco (US), a unit of Katy Industries Incorporated (US). Under the terms of the agreement, Church & Dwight licenses the use of its BRILLO brand

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“Demand for I&I cleaners in the transportation and distribution market is projected to increase 3.3 percent yearly to \$264 million in 2012. While vehicle washing products will continue to account for more than half of overall demand, improved coatings on new vehicles will limit further gains since these coatings require no polishing for an initial period, and generally lower levels of maintenance other than basic washing during their service lifetimes. Nevertheless, growth in the number of ...”  
 --Section III, pg. 83

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**OTHER STUDIES**

**Cosmetic & Toiletry Chemicals**

US demand for cosmetic and toiletry chemicals will rise 5.8% yearly through 2012, aided in part by consumer preferences for organic and natural products. Chemicals used as active ingredients will benefit from continued gains in cosmeceutical skin care products and high value nanoscale additives. This study analyzes the \$6.6 billion US cosmetic and toiletry chemicals industry, with forecasts for 2012 and 2017 by product, function and market. It also evaluates market share and profiles industry players.

#2369 ..... 07/2008..... \$4700

**Solvents**

Demand for solvents in the US will reach 11.8 billion pounds in 2012. Esters and alcohols will exhibit the best growth within the conventional solvents product group, though green solvents such as hydrogen peroxide and supercritical fluids will post more rapid gains. This study analyzes the \$5.5 billion US solvents industry, with forecasts for 2012 and 2017 by solvent product, market and function. It also considers market environment factors, evaluates company market share and profiles industry players.

#2357 ..... 06/2008..... \$4600

**Enzymes**

US demand for enzymes will grow 6% annually through 2012. Advances will be led by continued rapid expansion in the fuel ethanol segment of the starch processing enzyme market, as well as strong growth in the large pharmaceutical and smaller biocatalyst and pulp and paper markets. Animal feed will also contribute to gains. This study analyzes the \$1.9 billion US enzyme industry, with forecasts for 2012 and 2017 by market and product. It also evaluates market share and profiles industry competitors.

#2351 ..... 06/2008..... \$4600

**Food & Beverage Additives**

US food and beverage additive demand will rise 4.4% annually through 2012, driven by new and improved products. The flavored water, sports drink and energy drink markets will register robust growth. Additives in dairy products will benefit from increasing use of probiotic ingredients in yogurt and other products. This study analyzes the \$7 billion US food and beverage additive industry, with forecasts for 2012 and 2017 by product and application. It also evaluates market share and profiles major producers.

#2305 ..... 03/2008..... \$4500

**World Enzymes**

World demand for enzymes will grow 7.6% annually through 2011. Gains will be driven by continued robust growth in pharmaceutical enzyme demand, double-digit increases in demand for biocatalysts for drug and fine chemical production, and the rapid expansion in bioethanol production from grains. This study analyzes the \$4.1 billion world enzyme industry, with forecasts for 2011 and 2016 by product, market, world region and for 15 countries. It also evaluates market share and profiles major players.

#2229 ..... 09/2007..... \$5400

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