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World Industrial & Institutional Cleaning Chemicals

Industry Study with Forecasts for **2013 & 2018**

Study #2608 | April 2010 | \$5800 | 415 pages

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While the industry is trending toward formulations that offer improved cleaning properties, greater safety and reduced environmental impact, traditional cleaners will retain their market presence.

Global demand to increase 4.4% yearly through 2013

Global demand for industrial and institutional (I&I) cleaning chemicals is projected to increase 4.4 percent per year to nearly \$38 billion in 2013. This will represent a deceleration from the 2003-2008 period, during which overall economic growth was stronger in most parts of the world and prices were driven upward by higher energy and raw material costs. In broad terms, the industry is trending toward formulations that offer improved cleaning properties, greater safety and reduced environmental impact. Nevertheless, traditional cleaners will retain their market presence, especially in cost-constrained markets, less affluent developing areas and applications in which commodity cleaners can perform adequately.

Disposable serviceware to stunt foodservice market

Commercial markets account for a majority of global I&I cleaning chemical demand. Foodservice is by far the largest commercial market. However, the foodservice market is projected to register growth slightly below the average for commercial markets, in part due to the increased popularity of disposable serviceware in quick service restaurants and cafeterias. Food and beverage processing is the largest manufacturing market, for many of the same reasons that foodservice is the largest commercial market: food and beverage processing of some sort occurs nearly every-



where, and the need to assure that food is handled and prepared safely boosts demand for products used to wash raw food ingredients and processing equipment.

US to remain largest single national market

North America and Western Europe are the largest regional markets for I&I cleaning chemicals, combining to account for more than 60 percent of global demand in 2008. The US will remain the largest single market, a function of its overall affluence coupled with its large number of foodservice outlets and other commercial establishments, substantial manufacturing base,

and sizable health care system. Western Europe is projected to register the slowest growth among regional markets, due to sluggish economic expansion and very slow population growth. In contrast, the Asia/Pacific region will register very strong gains, boosted mainly by the continued robustness of the Chinese market. Advances in most of the rest of the Asia/Pacific region will also be healthy, offsetting subpar growth in Japan -- which is more comparable to Western Europe in terms of demographics and macroeconomic climate. The other, somewhat less developed regional markets are also projected to post gains above the world average, although they will continue to account for a comparatively small share of the global market.

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Sample Text, Table & Chart

ASIA/PACIFIC

Australia: I&I Cleaning Chemical Demand

Demand for I&I cleaning chemicals in Australia is projected to increase 4.0 percent annually through 2018. This is faster than the pace for the Asia/Pacific region as a whole, which is projected to grow at a faster pace than the overall market. This is due to faster growing markets among the Asia/Pacific region, particularly in manufacturing activity and infrastructure expansion.

SAMPLE TEXT

The commercial market for I&I cleaning chemicals in Australia is projected to increase 4.0 percent annually through 2018. This is faster than the overall average rate of growth for the Asia/Pacific region, with sustained increases in both the large foodservice market and other commercial segments. Hotels and other lodging facilities are an important market due to the amount of business travel and tourism in Australia. Australia is also a relatively significant vehicle wash market due to the level of vehicle ownership, which is among the highest in the world -- nearly five times the global per capita average and approximately twelve times the regional average.

The Australian manufacturing segment for I&I cleaning chemicals offers considerable opportunity for growth. The country is home to a substantial food and beverage processing industry, and production is expected to rebound from a ten-year period of sluggish growth. Workplace health and safety rules for manufacturing facilities are comparable to those in other developed countries, which will sustain demand for material/sanitation products across the manufacturing sector, including outlets as metal processing and transportation equipment maintenance.

The institutional and government segment is the smallest of the three major I&I markets, but is projected to register the fastest

TABLE VI-3

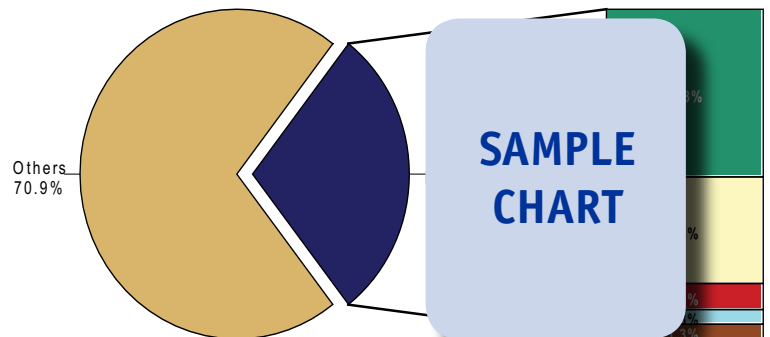
AUSTRALIA: KEY INDICATORS FOR I&I CLEANING CHEMICAL DEMAND (billion 2007 US dollars)

Item	1998	2003	2008	2013	2018
Resident Population (mil persons)	19.4	20.4	21.4	22.4	23.4
GDP/capita	20,500	22,500	24,500	26,500	28,500
Gross Domestic Product	395	465	535	605	675
Personal Consumption Expenditures	248	288	328	368	408
Manufacturing Value Added	107	117	127	137	147
Food & Beverage Mfg Value Added	11	11	11	11	11
Health Care Expenditures (bil US\$)	10	10	10	10	10
Foodservice Revenues	38	38	38	38	38
Motor Vehicles in Use (mil)	1.5	1.5	1.5	1.5	1.5
\$ I&I cleaning chemical/000\$ GDP	0.66	0.66	0.66	0.66	0.66
I&I Cleaning Chemical Demand (mil US\$)	265	265	265	265	265

SAMPLE TABLE

CHART VIII-1

WORLD I&I CLEANING CHEMICAL MARKET SHARE (\$30.4 billion, 2008)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-4
**AUSTRALIA: I&I CLEANING CHEMICAL
 DEMAND BY TYPE & MARKET**
 (million US dollars)

Item	1998	2003	2008	2013	2018
Resident Population (mil persons)	17.1	17.5	17.9	18.3	18.7
\$ I&I cleaning chemical/capita	17.1	17.5	17.9	18.3	18.7
I&I Cleaning Chemical Demand					
By Type:					
General Purpose Cleaners					
Floor Care					
Warewashing					
Disinfectants & Sanitizers					
Other					
By Market:					
Commercial					
Manufacturing					
Institutional & Government					
% Australia					
Asia/Pacific I&I Cleaning Chemicals	44.7	45.5	46.3	47.1	47.9



COMPANY PROFILES

Lion Corporation
 3-7, Honjo 1-chome
 Sumida-ku, Tokyo 130
 Japan
 813-3621-6211
 http://www.lioncorp.com

SAMPLE PROFILE

Sales: \$1.2 billion in 2009
 Geographical: 86% and Other
 Asian Countries
 Employees: 10,000

Key Products: amphoteric surfactants; polymer surfactants; chelating agents; detergents

Lion is a diversified company with operations in personal care products, home care products, foods, pharmaceuticals, and chemicals. The Company operates in four segments: Household Products, Health Care Products, Chemical Products and Other Businesses.

The Company is active in the world industrial and institutional (I&I) cleaning chemicals market through the Chemical Products segment, which generated sales of \$236 million in 2009. Via this segment, Lion produces base chemical products for a wide range of applications. Among these chemicals are anionic, nonionic, cationic and amphoteric surfactants, which are used as raw materials in the production of I&I cleaning chemicals; polymer surfactants; polyethylene glycols; chelating agents; and I&I detergents.

Lion's I&I cleaning chemical raw materials are used primarily in the manufacture of detergents. Among these products are anionic surfactants, which comprise LIPOLAN types for mild kitchen detergents

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“As in most developed I&I markets, general purpose cleaners account for the largest share of the market in Australia. However, disinfectants and sanitizers are expected to register the fastest growth through the forecast period, due to concerns about communicable diseases and foodborne pathogens, which will boost demand in such markets as health care, foodservice, and food and beverage processing -- all of which will register strong growth.”

--Section VI, pg. 170

OTHER STUDIES

Industrial & Institutional (I&I) Cleaning Chemicals

US demand for industrial and institutional (I&I) cleaning chemicals will increase 4% annually through 2014. Disinfectants and sanitizers will be the fastest growing type as the food industry faces tighter safety requirements. General purpose cleaners and floor care cleaners will remain the largest segments. This study analyzes the \$8.8 billion US I&I cleaning chemical industry, with forecasts for 2014 and 2019 by market, product and raw material. It also evaluates company market share and profiles industry players.
 #2683 September 2010..... \$4900

Food Safety Products

US food safety product demand will rise 6.7% yearly through 2014, driven by food safety concerns and regulations. The food and beverage processing market will remain dominant, led by the beverage segment. Disinfection and diagnostic products will continue as the most common types, while smart labels and tags will see the fastest growth. This study analyzes the \$2.1 billion US food safety product industry, with forecasts for 2014 and 2019 by product and market. It also evaluates company market share and profiles industry players.
 #2618 April 2010 \$4800

Home & Garden Pesticides

US home and garden pesticide demand will rise 4.1% yearly through 2013. Insecticides will remain the largest type based on concerns about insect-borne diseases and imported aggressive insects. Fungicides and other types will be the fastest growing segment. Household applications will outpace lawn and garden uses. This study analyzes the \$1.4 billion US home and garden pesticide industry, with forecasts for 2013 and 2018 by product, application and raw material. It also evaluates company market share and profiles industry players.
 #2589 January 2010 \$4700

Infection Prevention Products & Services

US demand for infection prevention products and services will increase 4.8% annually through 2013. The best growth opportunities are anticipated in safety-enhanced devices that reduce the risk of health care acquired infections. Medical waste disposal and sterilization supplies, as well as high level disinfectants, will also do well. This study analyzes the \$18.6 billion US infection prevention industry, with forecasts for 2013 and 2018 by product, service and market. It also evaluates market share and profiles industry players.
 #2526 August 2009..... \$4700

Food Safety Products in China

Food safety product demand in China will grow 15% yearly through 2013. Growth will be driven by ongoing food and beverage output gains, especially processed items, and more focus on food safety and supply chain security. Disinfection products will remain the largest segment while tracking products grow the fastest. This study analyzes the 6.5 billion yuan food safety product industry in China, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry participants.
 #2525 July 2009..... \$5200

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