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Industrial & Institutional (I&I) Cleaning Chemicals

US Industry Study with Forecasts for **2014 & 2019**

Study #2683 | September 2010 | \$4900 | 361 pages

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An improved economy is expected to boost demand across the board, perhaps most vigorously in markets hardest hit by the recent recession (e.g., laundries, car washes, transportation facilities).

US demand to rise 4% annually through 2014

Demand for industrial and institutional (I&I) cleaning chemicals is projected to increase 4.0 percent annually in the US to \$10.7 billion in 2014. The anticipated economic recovery will boost demand across the board following a weak 2009, perhaps most vigorously in markets hardest hit by the recent recession, such as laundries, car washes and transportation facilities. In contrast, the health care market -- far less affected by the recent economic downturn -- is expected to continue to register industry-leading growth, due to the incessant need to combat viral and bacterial threats.

Disinfectants, sanitizers to be fastest growing

Sales of disinfectants and sanitizers will experience the fastest advances of any major product type, as food industry participants seek to satisfy the stringent safety requirements of consumers, regulators, and national and global food retailers and foodservice companies, especially following several recent foodborne illness outbreak, such as the 2008-2009 case of *Salmonella*-contaminated peanut butter, which caused nine deaths and sickened more than 700 Americans. Food and beverage processors will rely on I&I cleaning products to help them avoid nationwide food product recalls, such as the recall of hundreds of food products possibly containing *Salmonella*-contaminated hydrolyzed vegetable protein in 2010. More recently,

US I&I Cleaning Chemical Demand (\$8.8 billion, 2009)



General Purpose
I&I Cleaners
26%

Floor Care
Products
16%

Warewashing
Detergents
15%

Disinfectants &
Sanitizers 13%

Other I&I Cleaners
30%

hundreds of millions of eggs have been recalled in light of thousands being made ill by *Salmonella*. In addition, trends toward the use of more expensive and user-friendly disinfectants and sanitizers in foodservice establishments will boost value gains in that segment.

General purpose cleaners and floor care products will remain the largest product categories, combining to account for 40 percent of overall demand in 2014. Favorable growth opportunities in this segment exist for multifunctional general purpose cleaning products with greater convenience and user safety -- such as those products suitable for use without specialized training or additional safety equipment.

Raw material trends favor surfactants, antimicrobials

A number of trends in raw material usage are influencing the I&I cleaning chemical product mix. 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 and in high-efficiency equipment. Additionally, end users continue to gravitate to cleaning products with antimicrobial additives such as triclosan, in part because they feel that such products offer additional protection from viruses, 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 by 1.5 million pounds in 2014. This growth is driven by many factors, including above-average growth for cleaning products. The primary drivers will be driven by trends in multifunctional products, as well as greater use of specialty surfactants. Some traditional raw materials, such as caustic soda, are expected to decline.

**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 which offer multiple benefits, including low foaming characteristics and improved cleaning action in more concentrated formulations. 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 environmental and regulatory issues. In the past, use of common platforms dominated the I&I cleaning industry, with formulators differentiating their product with the use of additives. More recently, a trend toward unique formulations featuring specialty surfactants or blends has emerged. At the same time, speed to market has become more important as suppliers of finished products strive for an

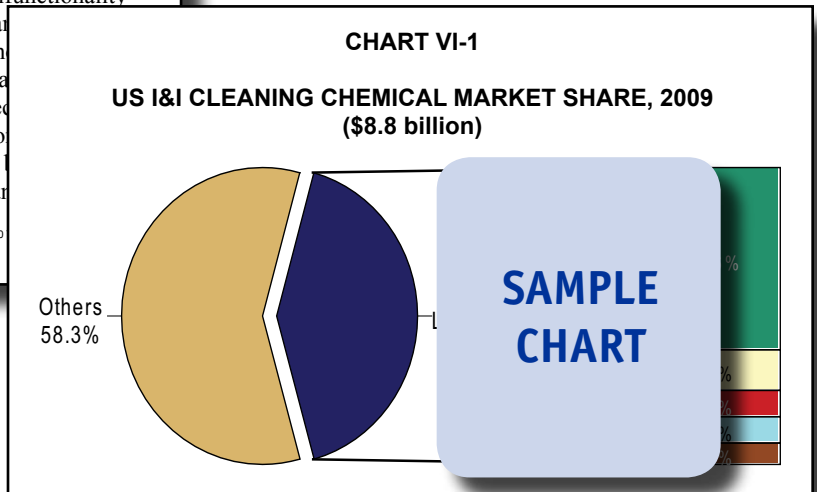
177

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

Item	1999	2004	2009	2014	2019
Commercial Building Space (bil sq ft)					
\$ I&I cleaning chemical/000 sq ft					
Commercial I&I Cleaning Chemicals					
Foodservice					
Retail					
Laundry & Dry Cleaning					
Car Washes					
Office					
Hotels & Other Lodging					
Transportation & Distribution					
Other					
% commercial					
Total I&I Cleaning Chemical Demand					

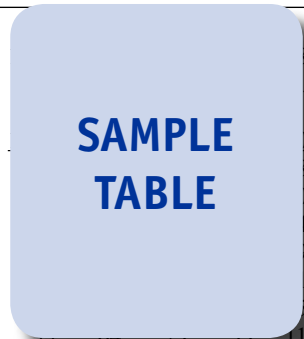
**SAMPLE
 TABLE**



Sample Profile, Table & Forecast

TABLE IV-3
ALKALINE GENERAL PURPOSE I&I CLEANER
DEMAND BY MARKET
 (million dollars)

Item	1999	2004	2009	2014	2019
General Purpose I&I Cleaner Demand					10
% alkaline					9
Alkaline Cleaner Demand					5
Food & Beverage Processing					10
Retail					10
Office					10
Foodservice					5
Metal Processing					5
Electronic Components					6
Other					19



COMPANY PROFILES

Barr (WM) & Company
 2105 Channel Avenue
 Memphis, TN 38113
 901-775-0100
<http://www.wmbarr.com>

Annual Sales
 Employment

Key Products: removal products; glass and surface cleaners; degreasers; and mold prevention and removal products

WM Barr manufactures a variety of paint, graffiti, rust and related removal products; glass and surface cleaners; degreasers; and mold prevention and removal products. These products are sold under the brand names as KLEAN-STRIP, KWIK, CITRISTRIP, SOLUTIONEX, JASCO, BIX, OXY-MOLD and GOOF OFF. WM Barr maintains a plant and distribution location in Memphis, Tennessee, as well as a distribution center in Ontario, California.

The Company competes in the US industrial and institutional (I&I) cleaning chemicals market through the manufacture and marketing of a variety of paint, graffiti, rust and related removal products; glass and surface cleaners; degreasers; and mold prevention and removal products. These products are sold under the brand names as KLEAN-STRIP, KWIK, CITRISTRIP, SOLUTIONEX, JASCO, BIX, OXY-MOLD and GOOF OFF. WM Barr maintains a plant and distribution location in Memphis, Tennessee, as well as a distribution center in Ontario, California.

KLEAN-STRIP Products -- WM Barr's KLEAN-STRIP product line includes a broad range of products for paint cleaning, thinning



"Demand for alkaline cleaners in I&I applications is projected to increase 2.6 percent per year to \$1.5 billion in 2014. Among larger markets, retail will register the strongest gains, mainly due to an anticipated rebound in retail activity. Among institutional markets, gains are expected to be fastest in the health care market, due to more aggressive infection control procedures in hospitals, acute care centers and other facilities. Demand in the food and beverage processing market, the largest outlet, is expected to ..."

--Section IV, pg. 126

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OTHER STUDIES

World Food Safety Products

Global food safety product demand will rise 8.1% yearly through 2014, driven by gains in food and beverage processing activity and increasingly strict food safety regulations. Best opportunities will be found in the Asia/Pacific region, while the US will remain the largest national market. This study analyzes the \$9.2 billion global food safety product industry, with forecasts for 2014 and 2019 by product, market, world region and for 17 countries. It also evaluates company market share and profiles industry participants.

#2693 November 2010 \$5800

Enzymes

US demand for enzymes will rise 4.8% annually to 2014. Gains will be driven by continued expansion of higher-value specialty enzymes in pharmaceuticals, diagnostics, research and biotechnology, and biocatalysts. In the biofuels segment, growth will moderate as the industry transitions to cellulases for producing biomass ethanol. This study analyzes the \$2.2 billion US enzymes industry, with forecasts for 2014 and 2019 by market and product. It also evaluates company market share and profiles industry competitors.

#2670 September 2010 \$4900

World Pesticides

Global demand for pesticides will rise 2.9% yearly to 2014. Gains will reflect a reversal of declines in 2009, caused in part by a price drop for the leading herbicide, glyphosate. Herbicides and insecticides will remain the largest types. Central and South America will offer the best growth opportunities. This study analyzes the \$45 billion world pesticide industry, with forecasts for 2014 and 2019 by product, market, world region and for 39 countries. It also evaluates company market share and profiles industry participants.

#2664 August 2010 \$5800

World Activated Carbon

World demand for virgin activated carbon will rise 9.9% yearly through 2014. The US is the largest national market and will also pace global growth based on anticipated new federal regulations mandating mercury removal at coal-fired power plants. This study analyzes the 1.1 million metric ton global activated carbon industry, with forecasts for 2014 and 2019 by type, application, market, world region and for 17 countries. It also evaluates company market share and profiles industry participants.

#2626 June 2010 \$5900

World Industrial & Institutional Cleaning Chemicals

Global demand for industrial and institutional (I&I) cleaning chemicals will rise 4.4% yearly through 2013. Gains will be fastest in developing countries. The shift toward higher-end formulations with reduced environmental impact will continue, although commodity cleaners will retain their presence. This study analyzes the \$30 billion world I&I cleaning chemical industry, with forecasts for 2013 and 2018 by product, market, world region and for 18 countries. It also evaluates company market share and profiles industry participants.

#2608 April 2010 \$5800

About The Freedonia Group

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