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Industrial & Institutional (I&I) Cleaning Chemicals

US Industry Study with Forecasts for **2016 & 2021**

Study #2916 | July 2012 | \$5100 | 363 pages

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Rapid gains for disinfectants and sanitizers in health care, as well as increased concern over food contamination, will propel US demand for industrial and institutional cleaning chemicals.

US demand to reach \$11 billion in 2016

Demand in the US for industrial and institutional (I&I) cleaning chemicals is projected to increase 3.7 percent per year to \$11 billion in 2016. This represents a considerable improvement over the 2006-2011 period, when nearly every market struggled and a few registered outright declines. But as the economic recovery continues to gain momentum, manufacturing activity will rebound and patronization rates of commercial establishments will increase -- benefiting products used to clean restaurants, hotels, and other commercial facilities.

Food/beverage processing to propel manufacturing segment to fastest growth

The manufacturing segment is projected to register the fastest growth in demand for I&I cleaning chemicals through 2016, based in large part on sustained growth in food and beverage processing, which accounts for the majority of consumption in manufacturing. Smaller industrial markets, such as fabricated metal processing, will also grow rapidly.

In the institutional segment, health care will remain the largest market, and by far the fastest growing. The aging of the population will raise the number of doctors' office visits, hospital visits, and other patient encounters, which will elevate cleaning requirements. Moreover, the constant challenge of keeping up with new strains of bacteria and other microbial threats will necessitate the use of higher value products.

US I&I Cleaning Chemical Demand (\$11 billion, 2016)



General Purpose I&I Cleaners 25%

Floor Care Products 17%

Disinfectants & Sanitizers 15%

Warewashing Detergents 14%

Other Products 29%

photo: LPS Laboratories, Inc.

In the large commercial segment, growth in demand will be somewhat slower, due mostly to the overall maturity of such markets as foodservice, laundry and dry cleaning, offices, and retail outlets. However, the hotel and lodging market will post above average growth due to increases in the number of establishments and increased patronage rates associated with the improving economy.

Disinfectants & sanitizers fastest growing products

Through 2016, disinfectants and sanitizers are projected to register the fastest gains among product types, in part due to their intensive use in the fast-growing health care market. However, increased concern about contamination of food and other products will also drive demand for

disinfectants, as well as associated products such as specialized hand cleansers, both to prevent the effects of contamination on finished products and to avoid potential liability issues.

In general, the I&I market is fairly mature. However, despite a lack of notably bold product innovations, there have been a number of equipment innovations within the industry. Specialized dispensing equipment for hand cleansers and other products have been introduced to deliver the proper amount of product and reduce waste. Improvements to floor finishing equipment have allowed suppliers of floor care products to offer improved performance with lower labor costs.

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Sample Text, Table & Chart

MARKETS

Retail

Retail businesses (excluding foodservice establishments) sent a significant market for I&I cleaning chemicals. In 2011, the market accounted for more than 13 percent of commercial I&I chemical demand.

Customers are increasingly aware of the appearance and of their surroundings while shopping, in part due to reports of resulting from unhygienic conditions, but also because cleaners are generally more pleasant to frequent. As a result, virtually all sectors rely on a broad array of I&I cleaning products to create an impression of cleanliness and quality. These products include toilet bowl cleaners, liquid hand soaps, general purpose cleaners, floor care products, and window cleaners, and disinfectants.

Retail Overview -- US retail sales are forecast to rise in 2016, a significant improvement in the 2006-2011 period. During this period, retail sales were limited by low consumer confidence related to the US economy. Especially hard hit were the housing and automobile sectors. Through 2016, however, the housing and automobile sectors are expected to strongly recover, which will boost retail sales of durable goods. For example, retail sales of furniture and furnishings will grow at an above average pace as demand rebounds due to the improvements in the housing market. Sales by automobile dealers will continue to recover from severe declines in 2008 and 2009, with growth in both the automobile and the light truck/utility vehicle/van segments. In addition, retail sales of electronics will see above average gains as consumers continue to show a willingness to spend on high end electronic products, especially smartphones, computers, media devices, e-book readers, and televisions with new technologies (e.g., high definition, plasma, LCD, 3-D, Internet).

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TABLE III-14

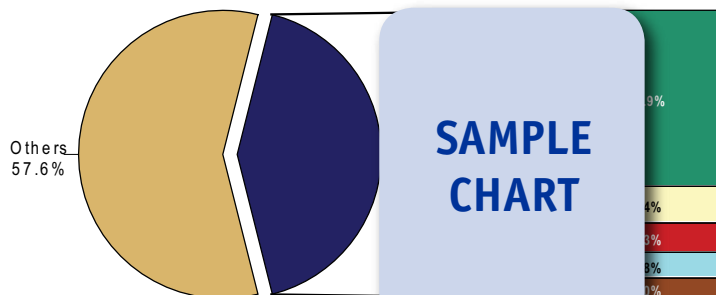
HOTEL & OTHER LODGING MARKET FOR I&I CLEANING CHEMICALS (million dollars)

Item	2001	2006	2011	2016	2021
Lodging Receipts (bil \$) \$ I&I cleaning chems/000\$ receipts					
Lodging Establishments (000) 000\$ I&I chems/establishment					
Lodging Floor Space (bil sq ft) \$ I&I cleaning chemicals/000 sq ft					
Lodging Employees (000) \$ I&I cleaning chemicals/employee					
Hotel & Other Lodging I&I Chemicals					
Floor Care Products					
Laundry Detergents					
Disinfectants & Sanitizers					
Other					
% hotel & other Commercial I&I Cleaning Chemicals					

SAMPLE
TABLE

CHART VI-1

US I&I CLEANING CHEMICAL MARKET SHARE (\$9.3 billion, 2011)



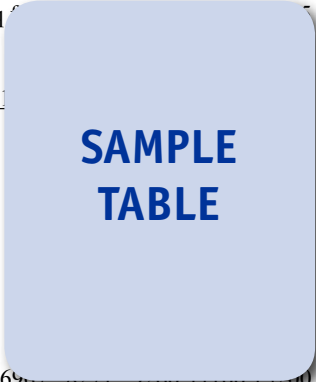
SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE IV-7

I&I FLOOR CARE PRODUCT DEMAND BY TYPE & MARKET
(million dollars)

Item	2001	2006	2011	2016	2021
Nonresidential Bldg Floor Space (bil sq ft)					
\$ floor care/000 sq ft					
I&I Floor Care Product Demand					
By Type:					
Finishes					
Strippers					
Carpet Care Products					
By Market:					
Foodservice					
Other					
% floor care					
Total I&I Cleaning Chemical Demand	690	827	920	1100	1300



COMPANY PROFILES

GOJO Industries Incorporated
 1 GOJO Plaza
 Akron, OH 44316
 330-255-6000
 http://www.gojo.com

SAMPLE PROFILE

Annual Sales: \$1.2 billion
 Employment: 10,000

Key Products: Hand sanitizers, hand soaps, lotions, and other hand care products; cleaning products

GOJO Industries is a leading worldwide producer and supplier of hand hygiene and related skin care products for commercial, industrial, and institutional use. The Company's product offerings consist of instant hand sanitizers, hand soaps, lotions, and other hand care products. In addition, the privately held company supplies dispensing systems and related accessories for use with its hand care products.

The Company is involved in the US industrial and institutional (I&I) cleaning chemicals market through the manufacture and sale of instant hand sanitizers and related hand cleaning products. GOJO Industries' hand sanitizers are suitable for use in foodservice, food processing, health care, education, automotive, manufacturing, office, hospitality, law enforcement, military, and other I&I settings. These products are marketed primarily under the GOJO, PURELL, PROVON and MICRELL, brand names. In October 2010, GOJO Industries acquired the PURELL brand from the Johnson & Johnson Consumer Companies Incorporated subsidiary (Skillman, New Jersey) of Johnson & Johnson (New Brunswick, New Jersey). Prior to the acquisition, GOJO Industries marketed hand sanitizers under the PURELL brand name for use in foodservice, health care, education, and other professional settings via a licensing agreement with Johnson & Johnson.

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"Demand for I&I floor finish products is projected to increase 3.5 percent annually to more than \$1.2 billion in 2016. Growth will be based on the increased demand for easier to use, durable, longer-lasting, and effective finishes. Although such products are typically more expensive, they save on overall operational expenses, which can generally be more significant than the cost of cleaning products. The best prospects are for ..."

--Section IV, pg. 147

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OTHER STUDIES

Amines

US demand for amines will rise 2.4 percent annually to 3.1 billion pounds in 2016, valued at \$4.3 billion. Healthy demand for alkylamines and ethanolamines as intermediates in pesticide active ingredient production will drive above average increases in the agricultural chemical market. Ethanolamines will be the largest and second fastest growing type. This study analyzes the \$2.8 billion US amines industry, with forecasts for 2016 and 2021 by product and market. The study also evaluates company market share and capacity share, and profiles industry players.

#2962December 2012 \$4900

Solvents

US solvents demand will continue to rebound from its recessionary lows, rising 1.5 percent per year in volume terms through 2016 to 10.9 billion pounds. Growth in consumer oriented markets and regulations aimed at solvent volatility and toxicity will favor "green" solvents such as butanediol derivatives, terpenes, and alcohols. The construction market will grow the fastest. This study analyzes the 10.1 billion pound US solvent industry, with forecasts for 2016 and 2021 by product and market. The study also evaluates company market share and profiles industry players.

#2925 November 2012 \$4900

Contract Cleaning Services

US revenues for contract cleaning services are forecast to rise 4.8 percent yearly to \$68.3 billion in 2016. Interior cleaning services will continue to account for the largest share of sales, but revenue from exterior cleaning services will grow the fastest. The industrial, institutional and residential markets will offer above-average growth prospects. This study analyzes the \$54.1 billion US contract cleaning service industry, with forecasts for 2016 and 2021 by service, market and region. The study also evaluates company market share and profiles industry players.

#2886 May 2012 \$4900

Cosmetic & Toiletry Chemicals

US demand for cosmetic and toiletry chemicals will rise 4.9 percent yearly to \$9.4 billion in 2016. Botanical extracts will lead gains based on their favorable natural profile, which many consumers perceive as being more healthful and beneficial than synthetic chemicals. Emollients and moisturizers will be the fastest growing chemicals by function. This study analyzes the \$7.4 billion US cosmetic and toiletry chemical industry, with forecasts for 2016 and 2021 by product, function and market. The study also evaluates company market share and profiles industry players.

#2865April 2012 \$4900

Janitorial Equipment & Supplies

US demand for janitorial equipment and supplies is forecast to grow 2.2 percent annually through 2015, an improvement over the 2005-2010 decline. Manual cleaning products will see the fastest gains of any major segment, driven by microfiber cloths, wipes, wet mops and squeegees. Institutional buildings will be the fastest growing market. This study analyzes the \$5.9 billion US janitorial equipment and supply industry, with forecasts for 2015 and 2020 by type, market and US region. The study also evaluates company market share and profiles industry players.

#2770 August 2011 \$4900

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