



World Industrial & Institutional (I&I) Cleaning Chemicals

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

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Although North America and Western Europe will continue to account for more than half of global demand, much faster growth is expected in developing regions such as India and China.

World demand to rise 4.7% annually through 2016

World demand for industrial and institutional (I&I) cleaning chemicals is projected to increase 4.7 percent per year to \$44.4 billion in 2016. Although North America and Western Europe will continue to account for more than half of global demand, much faster growth is expected in developing regions. The Chinese market will continue to grow at a robust pace, even as economic growth in China begins to moderate. The potentially large Indian market will post the world's fastest gains, but will remain far less developed, even by the standards of the region. Among more developed markets, a common theme will be improved growth as the global economic condition brightens. In the US market, by far the world's largest, I&I cleaning chemicals will benefit from the economic recovery, boosting manufacturing activity and raising the patronization rates of commercial establishments - which will contribute to increases in demand for products used to clean restaurants, hotels, and other commercial facilities. There will be a similar rebound in Western Europe and Japan, although gains in those locations will be generally smaller.

Value added products to boost developed area sales

Suppliers competing in the more established markets have taken a number of approaches to add value for customers and create opportunities for growth.

World I&I Cleaning Chemical Demand, 2016 (\$44.4 billion)



North America
30%

Asia/Pacific
27%

Western Europe
23%

Other Regions
20%

photo: Hydro

These approaches often involve efforts to reduce the impact of high labor costs, which in the developed world are often much greater than an establishment's budget for cleaning chemicals. For example, some suppliers offer equipment that is specifically designed to reduce steps in cleaning, which saves on total cleaning costs without cutting into spending on cleaning chemicals. Others offer dispensing equipment that prevents waste and ensures that proper amounts of chemicals are used. Among the largest suppliers, a common practice is to offer technical expertise and support to users to develop complete cleaning systems that are designed to minimize cleaning time and effort and maximize efficacy, which can reduce overall

cleaning budgets without reducing spending on the chemicals themselves.

Disinfectants, sanitizers to be fastest growing types

The products expected to register above average growth are generally those which are used in faster growing applications, such as health care and food processing. Disinfectants and sanitizers will be the foremost beneficiaries of this trend, particularly in areas in which they typically have been underutilized, but also in developed areas due to more intensive infection control efforts and the continuously evolving nature of bacterial and other microbial threats.

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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 by 1.5 million in 2016. While growth in the residential sector is slower than the overall market, this will be offset by faster growth in commercial and manufacturing segments, due to a projected 3% growth in consumer spending.

**SAMPLE
TEXT**

The residential segment in the Australian market is projected to grow at a slower rate than the overall market, with demand in 2011. Commercial applications are expected to register growth that is slower than the overall average rate of growth in the Australian market, although there will be 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 -- more than four times the global per capita average and almost 10 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 accelerate from a 10-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 janitorial/sanitation products across the manufacturing sector, such outlets as metal processing and transportation equipment.

The institutional and government segment is the smallest of the three major I&I markets, but is projected to register the fastest growth through 2016. Australia has a large and developed health care structure, and infection control techniques are on par with the

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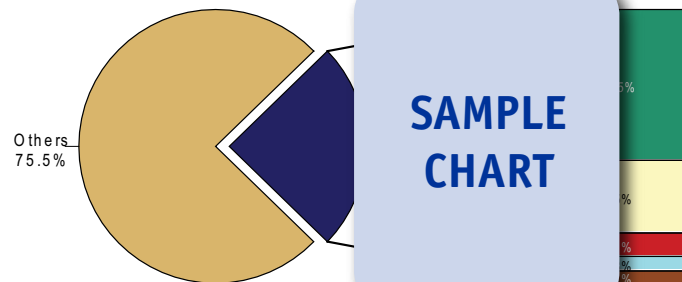
TABLE VI-3
AUSTRALIA:
KEY INDICATORS FOR I&I CLEANING CHEMICAL DEMAND

Item	2001	2006	2011	2016	2021
Resident Population (mil persons)	19.5	21.5	22.5	23.5	24.5
\$ GDP/capita	30,000	35,000	40,000	45,000	50,000
Gross Domestic Product (bil 2010 US\$)	105	135	165	195	225
Pers Consumption Expend (bil 2010 US\$)	75	85	95	105	115
Mfg Value Added (bil 2010 US\$)	25	30	35	40	45
Food & Beverage MVA (bil 2010 US\$)	3	4	5	6	7
Health Care Expenditures (bil US\$)	10	12	14	16	18
Foodservice Revenues (bil US\$)	9	10	11	12	13
Motor Vehicles in Use (mil)	3	4	5	6	7
\$ I&I cleaning chemical/000\$ GDP	0.09	0.09	0.09	0.09	0.09
I&I Cleaning Chemical Demand (mil US\$)	1.5	1.5	1.5	1.5	1.5

**SAMPLE
TABLE**

CHART VIII-1

WORLD I&I CLEANING CHEMICAL MARKET SHARE
 (\$35.3 billion, 2011)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

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

Item	2001	2006	2011	2016	2021
Resident Population (mil persons)					
\$ I&I cleaning chemical/capita					
I&I Cleaning Chemical Demand By Type:					
General Purpose Cleaners					
Floor Care					
Warewashing					
Disinfectants & Sanitizers					
Laundry Care					
Other					
By Market:					
Commercial					
Manufacturing					
Institutional & Government					
% Australia					
Asia/Pacific I&I Cleaning Chemicals	490	637	856	1,216	1,750

SAMPLE
PROFILE

SAMPLE
TABLE

COMPANY PROFILES

Barr (WM) & Company

2105 Channel Avenue
 Memphis, TN 38113
 901-775-0100
<http://www.wm.com>

Annual Sales:
 Employment:

Key Products: removal products; de-
 greasers; and mold prevention and

WM Barr is a privately held producer of paint-related chemicals for the automotive and marine markets, as well as cleaners, automotive fluids and chemicals, wood care and refinishing products, and shop maintenance accessories. The Company also offers blending and packaging services.

WM Barr competes in world industrial and institutional cleaning chemicals market via the production and sale of various paint, graffiti, rust, and other removal products; degreasers; and mold prevention and removal products. These items are marketed under such brand names as KLEAN-STRIP, KWIK, CITRISTRIP, NORUST, JASCO, BIX, OXY-MOLD, and GOOF OFF. WM Barr has a plant and distribution center in Memphis, Tennessee and a distribution center in Ontario, California. The Company primarily serves customers in the US.

Among WM Barr's KLEAN-STRIP product line is a wide array of products for paint cleaning, thinning, and removal applications. Specific products include KLEAN-STRIP GREEN low odor, environmentally friendly paint removers, which do not contain methylene chloride,

"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. 177-8

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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.

#2962 December 2012 \$4900

World Food Safety Products

World food safety product demand will rise 8.4 percent yearly to \$18 billion in 2016. Disinfectants and sanitizers will remain the top segment, while diagnostic testing products and other products such as smart labels and tags lead gains. The US will remain the largest national market, but the fastest growth will occur in developing regions. This study analyzes the \$12.1 billion global food safety product industry, with forecasts for 2016 and 2021 by product, market, world region and for 39 countries. The study also evaluates company market share and profiles industry players.

#2969 November 2012 \$6100

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

Industrial & Institutional Cleaning Chemicals

Demand in the US for industrial and institutional (I&I) cleaning chemicals will increase 3.7 percent per year to \$11 billion in 2016. Disinfectants and sanitizers and hand cleansers will be the fastest growing products. The manufacturing market will lead gains, driven by the food and beverage processing and fabricated metals processing segments. This study analyzes the \$9.3 billion US I&I cleaning chemical industry, with forecasts for 2016 and 2021 by market, product and raw material. The study also evaluates company market share and profiles industry players.

#2916 July 2012 \$5100

Food Safety Products

Demand for food safety products in the US is forecast to increase 7.3 percent annually to \$4.5 billion in 2016. Smart labels and tags, and software and tracking systems will see the fastest gains by product, followed by diagnostic products. Food processing plants will remain the largest market, but will be slightly outpaced by other, smaller markets. This study analyzes the \$3.2 billion US food safety product industry, with forecasts for 2016 and 2021 by product and market. The study also evaluates company market share and profiles industry players.

#2887 May 2012 \$4900

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