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Disinfectant & Antimicrobial Chemicals

US Industry Study with Forecasts for **2017 & 2022**

Study #3043 | June 2013 | \$4900 | 187 pages

www.freedoniagroup.com



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

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Disinfectant & Antimicrobial Chemicals

US Industry Study with Forecasts for **2017 & 2022**

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A rebound in building construction activity, in conjunction with an improving US economy, will drive strong increases in industrial markets such as paint and coatings, and plastics.

US demand to rise 6.1% annually through 2017

Demand for disinfectant and antimicrobial chemicals in the US is forecast to rise 6.1 percent annually to \$1.6 billion in 2017. A rebound in building construction activity, in conjunction with an improving US economy, will drive strong increases in industrial markets such as paint and coatings, and plastics. In institutional and consumer applications, anxieties about disease -- foodborne, health care-associated (HAI), and antibiotic-resistant -- will lead to gains amid increasing regulatory scrutiny and intensifying cleaning regimens. Rising public concern about microbial pathogens will also support growth in some industrial markets as disinfectant and antimicrobial additives are used in a broader array of products. Overall, strong volume growth will offset moderate price increases and shifts toward lower cost disinfectants.

Housing rebound to benefit key markets

Substantial growth in residential construction activity, led primarily by a housing rebound, will result in the increased production of antimicrobial-containing products such as water-based architectural paint, floor coverings, home textiles, and other construction materials. Organosulfur compounds will see significant growth in these applications, particularly in paint, thanks to performance advantages and environmental concerns about competing products.



More thorough disinfection regimens to spur gains

Several factors will result in more thorough disinfection regimens among food and beverage processors, hospitals and other health care providers, restaurants, and hotels. Heightened public apprehension about foodborne illnesses such as *E. coli* and *Salmonella*, increased regulatory scrutiny following the Food Safety Modernization Act of 2011, and growing liability concerns will contribute to increased disinfectant demand in the food and beverage processing and the restaurant and lodging markets. In the medical and health care market, concerns about HAIs such as *C. difficile* and antibiotic-resistant

pathogens such as MRSA, changes in Medicare and Medicaid reimbursement rules, pressure from insurers, and extensive coverage of deadly outbreaks by the mass media will continue to drive disinfectant and antimicrobial consumption. Phenolic compounds are projected to capture most of the growth in health care applications in value terms, owing to their efficacy and ease of use.

Demographics, consumer trends to influence demand

An older population will spend more money at restaurants and hotels, driving disinfectant use in those environments. Aging baby boomers will also require more medical care, necessitating more disinfectants for health care settings. Rising consumer spending will support sales of specialty disinfectant cleaners and value-added consumer products imbued with antimicrobial properties, such as odor-resistant athletic apparel and degradation-resistant plastic products.

Study Coverage

This industry study, **Disinfectant & Antimicrobial Chemicals**, presents historical demand data (2002, 2007, 2012) and forecasts for 2017 and 2022 by market, function, and product. The study also considers market environment factors, details industry structure, evaluates company market share, and profiles 20 industry players such as BASF, Dow Chemical, and Lonza Group.

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Sample Text, Table & Chart

MARKETS

Industrial

Demand for disinfectant and antimicrobial chemicals in industrial markets is projected to increase through 2017, faster than the overall average value growth. Advances will be seen in paint and coatings production factors related to the housing rebound for textiles and plastics. In addition, heightened concerns about the spread of foodborne pathogens will support continued growth in the beverage processing market.

While overall manufacturing activity is expected to increase over the next five years, the single factor with the biggest impact on industrial markets discussed here (namely paint and coatings and textiles) will be rising construction spending -- especially residential construction. As the housing market recovers, demand for paint and coatings -- especially water-based architectural paints, which require antimicrobial additives -- will exhibit strong growth; demand for plastics used in construction such as PVC, which tend to require antimicrobial additives, will similarly climb; textiles related to residential construction, such as floor coverings and other home textiles, will also see demand growth.

Paint and coatings and plastics together will account for 60 percent of total demand for disinfectant and antimicrobial chemicals in industrial markets in 2017. The coatings market will remain by far the largest industrial outlet in value terms, due to renewed growth in construction resulting from the housing rebound and the recovering economy, as well as the ongoing shift to greater use of waterborne formulations in the industrial coatings segment, and the generally higher priced materials used in coatings products. Growth in demand for PVC, which

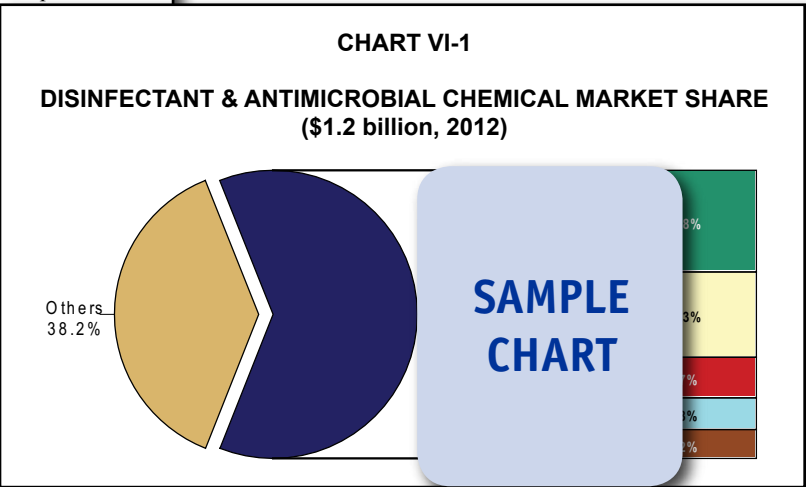
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SAMPLE TEXT

TABLE V-2
PHENOLIC DISINFECTANT & ANTIMICROBIAL CHEMICAL DEMAND BY MARKET
 (million dollars)

Item	2002	2007	2012	2017	2022
Gross Domestic Product (bil 2005\$)					
lb phenolics/mil \$ GDP					
Phenolic Demand (mil lb)					
\$/lb					
Phenolic Demand					
Industrial:					
Food & Beverage Processing					
Other					
Institutional & Commercial:					
Medical & Health Care					
Restaurant & Lodging					
Other					
Consumer					
% phenolics					
Disinfectant & Antimicrobial Demand					

SAMPLE TABLE



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE IV-3
ANTIMICROBIAL ADDITIVE DEMAND BY MARKET
 (million dollars)

Item	2002	2007	2012	2017	2022
Nondurable Goods Shipments (bil 2005\$)					
lb chemicals/mil \$ nondurable					
Antimicrobial Additive Demand (mil lb) \$/lb					
Antimicrobial Additive Demand					
Paint & Coatings					
Plastics					
Textiles & Other					
% antimicrobials					
Disinfectant & Antimicrobial Demand	600	720	1170	1500	2010

COMPANY PROFILES

Troy Corporation
 8 Vreeland Road
 Florham Park, NJ 07932
 973-443-4200
<http://www.troycorp.com>

Annual Sales:
 Employment:

Key Products:

Troy manufactures a wide range of materials as powder coatings, preservatives, wood protection chemicals, performance additives, metalworking fluids, plastics and metal carboxylates. The privately held company, which sells its products in over 100 countries, operates a US manufacturing facility at its headquarters complex in Florham Park, New Jersey, plus plants in five additional countries.

The Company is active in the US disinfectant and antimicrobial chemicals market through the manufacture of biocides used as broad spectrum preservatives and antimicrobials in a broad range of products to protect against the growth of bacteria, algae, fungi, mildew, and other deleterious microorganisms. These biocides are sold under the TROYSAN, TROYSAN POLYPHASE, POLYPHASE, GROGAN, 2PC, MERGAL, POLYPHASE BIONYL and TROYSHIELD brand names. Furthermore, Troy manufactures MICROPEL biocides through the Micropel division.

The TROYSAN range of organic biocides includes liquid bactericide, fungicide, liquid fungicide/mildewicide, and aqueous dispersion fungicide mildewicide/algaeicide types. For example, TROYSAN 1050

OTHER STUDIES

Water Treatment Chemicals

This study analyzes the US water treatment chemical industry. It presents historical demand data for 2002, 2007 and 2012, and forecasts for 2017 and 2022 by product (e.g., corrosion inhibitors, oxidizers and biocides, coagulants and flocculants, pH adjusters and softeners, defoamers, chelating agents, fluoridation chemicals), application (e.g., cooling water, supply water, wastewater), and market (e.g., industrial, municipal). The study also considers market environment factors, evaluates company market share, and profiles leading competitors.

#3072 September 2013 \$4900

Paint & Coatings

This study analyzes the US paint and coatings industry. It presents historical demand data for 2002, 2007 and 2012, and forecasts for 2017 and 2022 by market (e.g., architectural, furniture and fixtures, packaging, motor vehicles, metal building components, machinery, appliances, lawn and garden equipment, maintenance and specialty coatings), formulation (water-based, solvent-based, powder coatings), and substrate. The study also considers market environment factors, details industry structure, evaluates company market share, and profiles industry players.

#3073 August 2013 \$5100

World Infection Prevention Products

World demand for infection prevention products is forecast to increase 6.4 percent annually to \$130 billion in 2017. Growth in emerging economies will lead gains as their health care sectors are expanded, modernized and adapted to formal infection prevention protocols. Protective apparel and textiles will remain the top selling product group. This study analyzes the \$95.4 billion world infection prevention product industry, with forecasts for 2017 and 2022 by product, world region and for 15 major countries. The study evaluates company market share and profiles industry players.

#2997 April 2013 \$6100

World Aquaculture: Feed, Equipment & Chemicals

After several decades of rapid expansion, world demand for aquaculture supplies and equipment is expected to grow 7.4 percent per year to \$63.6 billion in 2017 at the farm gate level. The Asia/Pacific region will remain the dominant market, with the key China segment outpaced by other Asian countries. This study analyzes the \$44.6 billion world aquaculture supplies and equipment industry, with forecasts for 2017 and 2022 by fish type, product, market, world region and for 17 countries. The study also evaluates company market share and profiles industry participants.

#2999 March 2013 \$6100

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

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

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