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Surfactants

US Industry Study with Forecasts for **2018 & 2023**

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INDUSTRY STRUCTURE

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Growth will be supported by rising construction expenditures and oil and gas production, rebounds in consumer spending on personal care products, and a shift toward higher value specialty surfactants.

US demand to rise 3.2% annually through 2018

Demand for surfactants in the US is expected to rise 3.2 percent per year to 10.9 billion pounds in 2018, valued at \$14.4 billion. Growth will be supported by rising construction expenditures and oil and gas production, as well as by rebounds in consumer spending on personal care products. A shift toward higher value specialty surfactants for performance reasons will also promote growth in dollar terms.

Specialty surfactants to gain market share

Specialty surfactants will account for a greater share of spending on surfactants in industrial applications, as users favor their improved efficiency, multifunctionality, and greater safety and sustainability. Amphoteric, silicone, fluorosurfactants, quaternary ammonium compounds, and fatty amine oxides are among the surfactants that will show healthy growth going forward.

Industrial markets to post most significant gains

Industrial markets are expected to post the most significant gains in surfactant demand in both volume and value terms through 2018. Demand for surfactants used as cement and asphalt additives, particularly lignosulfonates and other anionics, will benefit from a rebound in nonresidential building construction. Favorable growth opportunities for

US Surfactant Demand, 2018 (10.9 billion pounds)



Cleaning Products

Personal Care Products

Industrial Applications

specialty surfactants in paint and coatings and plastics will benefit from a combination of expanding residential construction and increased manufacturing activity. Despite a decline in oil prices in late 2014 and early 2015, demand for surfactants used in oil and natural gas production is expected to rise at an above average pace, though growth will moderate from the double digit annual gains of the 2008-2013 period.

Cleaning product market to show moderate growth

Demand for surfactants in the established cleaning products segment is expected to show moderate growth in volume terms, as production of cleaning

products is projected to rise at a modest pace. In the household cleaning segment, an increasing share of products are concentrated versions and contain higher levels of surfactants, including specialty surfactants that are more efficient and gentler on the skin. Demand for surfactants in cleaning products will also be supported by greater emphasis on sustainability and multifunctionality. This trend will favor specialty products such as sugar-derived surfactants at the expense of commodity products such as linear alkylbenzene sulfonate (LAS). In the personal care product market, surfactants that are gentle on skin and hair and are also environmentally sustainable will see the best growth prospects in dollar terms.

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Sample Text, Table & Chart

CLEANING PRODUCTS

Laundry Detergents -- Demand for surfactants in household laundry detergents is expected to increase from 2.1 billion pounds in 2018, valued at \$1.1 billion. Liquid laundry detergents become more popular due to their multiple functions (such as stain removal, whitening, and brightening) requiring higher levels of surfactants to a single load.

SAMPLE
TEXT

As consumers continue to emphasize environmentally safe cleaning solutions in the household, newer laundry machines use smaller volumes of water at cooler temperatures. The energy-efficient high efficiency washers has contributed to rising sales of high efficiency detergents. High efficiency washers tend to use tumblers rather than agitators to move the laundry through the water, and the tumblers can be negatively affected by excess suds, so surfactants in high efficiency detergents must provide enough suds to remove soil from laundry without inhibiting the action of the washing machine. Additionally, high efficiency laundry detergents must be formulated for use in smaller volumes of cooler water. This reformulation includes improvements to a detergent's dispersing qualities as the detergent must be able to stay in suspension in these modified conditions, without redepositing soil onto the laundry.

Another factor impacting US surfactant demand in the household laundry detergent is consumer demand for gentler, more environmentally sustainable products. Concentrated laundry detergent products are often harsher than less concentrated products and can cause skin irritation for people who may be sensitive to detergent residues on clothing. These considerations have led to producers combining gentler surfactants, usually amphoteric such as betaines -- with other surfactants to perform the function of a detergent while improving its mildness. In addition, concerns about sustainability and environmental impact, pro-

44

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TABLE VII-2

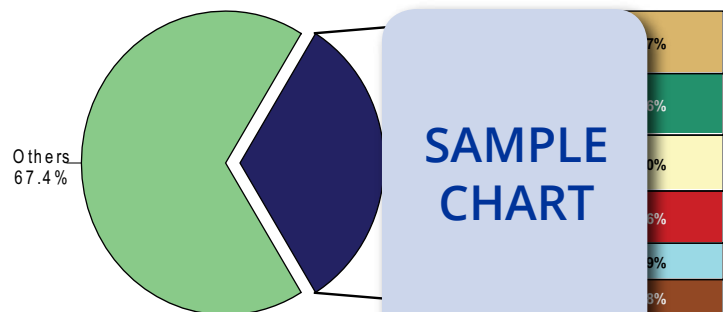
ANIONIC SURFACTANT DEMAND (million pounds)

Item	2003	2008	2013	2018	2023
Nondurable Goods Shpts (bil 2009\$)	20	25	28	30	35
lb anionics/000\$ nondurables					
Anionic Surfactant Demand					
Alcohol Ether Sulfates					
Lignosulfonates					
Linear Alkylbenzene Sulfonate					
Alcohol Sulfates					
Natural Soaps					
Other Anionic Surfactants					
\$/lb					
Anionic Surfactant Demand (mil \$)					
% anionic					
Surfactant Demand (mil \$)					

SAMPLE
TABLE

CHART VIII-1

US SURFACTANT MARKET SHARE, 2013 (\$11.0 billion)



SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE VI-1
INDUSTRIAL MARKETS FOR SURFACTANTS
 (million pounds)

Item	2003	2008	2013	2018	2023
Nondurable Goods Shpts (bil 2009\$)	200	200	200	200	200
lb surfactant/mil \$ nondurables					
Surfactants in Industrial Markets					
Cement & Asphalt					
Lubricants & Fuel Additives					
Food & Beverages					
Oil & Gas					
Agricultural Chemicals					
Paint & Coatings					
Plastics					
Textiles & Leather					
Other Markets					
\$/lb					
Surfactants in Industrial Mkts (mil \$)					
% industrial markets					
Surfactant Demand (mil \$)	600	600	600	600	600

SAMPLE PROFILE

SAMPLE TABLE

COMPANY PROFILES

Cytec Industries Incorporated

5 Garret Mountain Plaza
 Woodland Park, NJ 07424
 973-357-
<http://www>

Sales: \$
 Employ

Key prod and highly purified
 dioctyl s

Cytec Industries is a vertically integrated producer of specialty chemicals and materials. The Company operates through four segments: Aerospace Materials, Industrial Materials, In Process Separation, and Additive Technologies.

The Company is active in the US surfactants industry through the Additive Technologies segment, which had 2013 sales of \$275 million. Of the segment's 2013 sales, North America accounted for \$122 million. The Additive Technologies segment manufactures specialty and polymer additives, and formulated resins for a range of applications. The segment's specialty additives include sulfosuccinate surfactants as well as docusate sodium (DSS), an anionic surfactant; and COMPLETE-MIX 100, a specialty surfactant for the food and beverage industry.

Cytec Industries' sulfosuccinate surfactants, which are available under the AEROSOL brand name, are primarily anionic products used in emulsion polymers, paints, paper coatings, and printing inks, among other applications. AEROSOL surfactants encompass diester sulfosuccinates, monoester sulfosuccinates, sulfosuccinamates, and other products. Diester sulfosuccinates are available with varying alkyl chain

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**STUDY
COVERAGE**

Surfactants is a Freedonia study that presents historical demand data (2003, 2008, 2013) as well as forecasts (2018, 2023) by market and product. This study also considers market environment factors, examines the industry structure, evaluates company market share and profiles 34 US industry competitors.

OTHER STUDIES

Enzymes

This study analyzes the US enzyme industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by market (e.g., biofuels, food and beverage processing, research and biotechnology, cleaning products, diagnostics, animal feed) and product (e.g., carbohydrases, proteases, polymerases, nucleases, lipases). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3285 April 2015 \$5300

Waxes

This study analyzes the US wax industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., paraffin, microcrystalline waxes, polymer waxes, Fischer-Tropsch waxes, vegetable waxes, animal and insect waxes) and market (e.g., industrial, consumer and commercial). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3271 April 2015 \$5200

World Industrial & Institutional (I&I) Cleaning Chemicals

Global demand for I&I cleaning chemicals is projected to increase 4.3 percent per year to \$46.3 billion in 2018. The fastest growth will occur in healthcare, due to a rise in the number of hospital stays and concerns about healthcare-associated infections (HAIs). China and the Asia/Pacific region will be the fastest growing markets. This study analyzes the \$37.5 billion world I&I cleaning chemical industry, with forecasts for 2018 and 2023 by product, market, world region, and for 18 countries. The study also evaluates company market share and profiles industry participants.

#3207 November 2014 \$6300

Solvents

US demand for solvents is expected to increase at a 1.5 percent annual pace through 2018 to 11 billion pounds. Growing environmental concerns and regulatory pressure will drive demand for "green" solvents that are derived from renewable raw materials. The paint and coatings market will replace the transportation market as the largest solvent consumer. This study analyzes the 10.2 billion pound US solvent industry, with forecasts for 2018 and 2023 by product and market. The study also evaluates company market share and profiles industry players.

#3169 June 2014 \$5100

Industrial & Institutional (I&I) Cleaning Chemicals

Demand for industrial and institutional (I&I) cleaning chemicals in the US is forecast to rise more than three percent per year through 2018 to \$11.5 billion. Disinfectants and sanitizers will be the fastest growing product segment. The commercial market will remain dominant while the institutional and government market will see the most rapid gains. This study analyzes the \$9.9 billion US I&I cleaning chemical industry, with forecasts for 2018 and 2023 by market, product and raw material. The study also evaluates company market share and profiles industry players.

#3148 April 2014 \$5300

About The Freedonia Group

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