

Industrial & Institutional (I&I) Cleaning Chemicals

US Industry Study with Forecasts for 2020 & 2025

Study #3424 | June 2016 | \$5300



Healthcare market to grow fastest

The healthcare market for I&I cleaning chemicals in the US comprises almost half of demand for all institutional and government markets due to its many facilities and intensive use of cleaning chemicals. A serious push to reduce healthcare-associated infections (HAIs) will strengthen demand in nearly all product categories, making the healthcare market the fastest growing market for I&I cleaning chemicals. On the other hand, a decrease in the number and capacity of hospitals in favor of smaller outpatient facilities will hinder growth, as hospitals are the most intensive users of cleaning chemicals.

Food trucks & fast casual restaurants drive demand

Growth in I&I chemicals will be fueled by further expansion of foodservice revenues and the continued increases in the number of establishments, particularly food trucks and fast casual restaurants. Concerns about food safety and public perception of cleanliness will drive advances, although some business owners will strive to reduce expenses by eliminating wasted chemicals. Dispensers that automatically dilute the product or produce a pre-measured quantity will continue to penetrate the market and limit growth by preventing excess usage of cleaning chemicals.

Milder fragrances & formulations

Cleaning chemical formulations utilized in janitorial applications will tend toward gentler fragrances and

milder formulations when possible, particularly in facilities heavily visited by the public. Growth opportunities will exist for I&I chemicals marketed as natural or containing plant-based ingredients, although this shift will not be as marked as within the household market. Multipurpose products that reduce labor will be favored, as will strong concentrates that require less storage space and infrequent replenishment.

Drug-resistant bacteria concerns affect product mix

An emerging concern in these materials is drug-resistant bacteria. Some biocides are under scrutiny by both regulatory bodies and the general public. In particular, triclosan is currently under review by the Environmental Protection Agency (EPA) due to potential health effects. Widespread usage of triclosan-based hand cleansers is a possible contributor to the emergence of drug-resistant bacteria.

Study coverage

This study analyzes the US I&I cleaning chemical market. It presents historical demand data (2005, 2010, 2015) plus forecasts (2020, 2025) by market (industrial, commercial, institutional), product and raw material (biocides, solvents, chlor-alkalis, surfactants, phosphates, other). This study also considers key market environment factors, assesses the industry structure, evaluates company market share and profiles 39 competitors in the US industry, including Clorox, Ecolab, Procter & Gamble, Sealed Air (Diversey Care) and Zep.

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Hand Cleaners

Demand for I&I hand cleansers is forecast to rise through 2025, reaching 1.2 billion in 2020. Growth in hand sanitizer and hand washing as effective disease prevention measures has driven demand for hand soaps used in healthcare settings. Hand sanitizer is among the fastest growing since 2010, driven by its ability to eliminate germs more rapidly than soap and water. In the context of this study, hand cleansers include all hand soaps supplied for guest use by hotels, resorts, and other commercial facilities.

Hand sanitizer dispensers have become common in retail stores, offices, quick service restaurants, and educational facilities from daycares to colleges. Hand sanitizers have particularly expanded into healthcare establishments. Growth in outpatient healthcare visits and the further saturation of hand sanitizer dispensers will motivate gains in hand cleansers.

In markets where hand washing protocols are emphasized, there is still long term potential for growth due to evidence that compliance remains low. Rising awareness of hand washing as a means to reduce illness-related absences in schools is resulting in hand washing education campaigns. Low hand washing compliance in healthcare settings, particularly hospitals, has been suggested to contribute to the incidence of healthcare-associated infections (HAIs). Demand for hand cleansers formulated with moisturizing ingredients, appealing fragrances, and milder surfactants will grow faster than the average, as these products are more pleasant to use and increase hand washing compliance.

I&I hand cleansers can be formulated with synthetic detergents, pure soap tallow, or soap-detergent combinations and are marketed in

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TABLE III-4

RETAIL MARKET FOR I&I CLEANING CHEMICALS (million dollars)

Item	2005	2010	2015	2020	2025
Retail Sales (bil \$)					
\$ I&I clean chem/mil \$ sales					
Retail Establishments					
000\$ I&I clean chem/establishment					
Retail Employees (000)					
\$ I&I clean chem/employee					
Retail Floor Space (bil sq ft)					
\$ I&I clean chem/000 sq ft					
Retail Cleaning Chemical Demand					
General Purpose Cleaners					
Floor Care Products					
Other Products					
% retail					
Commercial I&I Cleaning Chemicals					

Source: The Freedonia Group

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I&I HAND CLEANSER DEMAND BY MARKET (million dollars)

Item	2005	2010	2015	2020	2025
Total Civilian Labor Force (mil)					
\$ hand cleanser/worker					
I&I Hand Cleanser Demand					
Healthcare					
Food & Beverage Processing					
Foodservice					
Retail					
Office					
Other					
% hand cleansers					
Total I&I Cleaning Chemical Demand					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

Related Studies

Contract Cleaning Services

Revenues for contract cleaning services in the US will rise 3.2 percent annually to \$65 billion in 2019. The dominant nonresidential market will benefit from an ongoing expansion in nonresidential floor space and number of businesses. However, the smaller residential market will grow the fastest. Exterior cleaning will be the fastest growing service. This study analyzes the \$55.7 billion US contract cleaning service industry, with forecasts for 2019 and 2024 by service, market and US region. The study also evaluates company market share and profiles industry players.

#3371..... December 2015..... \$5300

Janitorial Equipment & Supplies

US demand for janitorial equipment and supplies will rise 2.2 percent annually through 2019 to \$7.1 billion, driven by pent-up demand for automated floor cleaning equipment. Office and institutional buildings will remain the largest and fastest growing markets. In-house purchasers will remain dominant, but will be outpaced by contract cleaners. This study analyzes the \$6.4 billion US janitorial equipment and supply industry, with forecasts for 2019 and 2024 by product, market and purchaser. The study also evaluates company market share and profiles industry competitors.

#3311..... August 2015..... \$5300

World Wipes

Global demand for wipes is forecast to increase 5.2 percent annually through 2018 to \$13.5 billion. Because wipes are considered convenience products rather than necessities, developed nations represent a disproportionate share of sales. However, developing markets will account for a rising share of wipes sales going forward. This study analyzes the \$10.5 billion world wipes industry, with forecasts for 2018 and 2023 by product, world region, and for 14 countries. The study also evaluates company market share and profiles industry players.

#3251..... March 2015..... \$6300

Biocides

Demand for specialty biocides in the US is forecast to rise 4.0 percent per year to \$3.9 billion in 2018. A construction rebound will benefit the wood preservation and paint and coatings markets, while consumer spending and manufacturing gains will support uses in manufactured goods. Nitrogen compounds and organosulfurs will be the fastest growing types. This study analyzes the \$3.1 billion US biocide industry, with forecasts for 2018 and 2023 by product, function and market. The study also evaluates company market share and profiles industry competitors.

#3211..... September 2014..... \$5300

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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