

Specialty Surfactants

US Industry Study with Forecasts for 2020 & 2025

Study #3448 | August 2016 | \$4900



Advances for specialty surfactants in all markets will be supported by a continued trend toward safer, more environmentally friendly products. Multi-functionality and compatibility with other chemicals are also important features, as many producers seek to decrease chemical and additive content in products such as personal care products, cleaning chemicals, and food and beverages. However, specialty surfactants will continue to face significant competition from commodity surfactants, which are much less expensive and tend to be preferred in some high-volume markets such as cement and asphalt production and oil and gas production.

Consumer preferences offer opportunities

Consumer preferences for “natural” and/or “gentle” products favor specialty surfactants for personal care products. Specialty surfactants offer performance advantages over those commodity products that tend to be harsher on the skin and hair. Bio-derived surfactants and high-end products such as specially formulated silicone hair treatment products or improved hand soap formulations will drive demand in these markets.

In cleaning products, industrial/institutional and household users are favoring chemicals that are safe and gentle on the skin while also being extremely effective. In household cleaning products, the rise in popularity of dishwashing and laundry detergent pods is promoting demand for specialty surfactants that are effective at the lower volumes in these small, pre-measured doses, and

can be utilized in high-efficiency appliances which use smaller volumes of water at lower temperatures.

Environmental standards drive growth for specialty surfactants

Manufacturers seeking to meet environmental standards are switching to more expensive surfactants in the industrial market. Many of these products have more than one function, which reduces the total amount of chemicals needed. Moreover, effectiveness in specialty surfactants is generally higher than commodity products, so specialty surfactants may be utilized in lower dosages. However, many high-volume industrial markets are sufficiently price-sensitive that inexpensive commodities will continue to provide significant competition to specialty surfactants.

Study coverage

This study examines the US specialty surfactants market. It presents historical demand data (2005, 2010, 2015) plus forecasts (2020, 2025) in personal care products (personal soaps, cosmetics/toiletries) and cleaning products (household, industrial/institutional). Demand is also provided for industrial markets (cement/asphalt, oil/gas, lubricants/fuel additives, food/beverage processing, plastics, agricultural chemicals, paint/coatings, textiles/leather, other) and for product types (anionic, nonionic, cationic, other). Additionally, the study considers key market environment factors, assesses the industry structure, and evaluates company market share.

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CLEANING PRODUCTS

Surfactant Demand

Demand for specialty surfactants in household cleaning products is forecast to grow at a CAGR of 3.5% from 2016 to 2025, reaching almost \$1.5 billion. This growth is driven by the increasing use of treated and powdered specialty surfactants in household cleaning products. Additional specialty surfactants are being used in household cleaning products despite the fact that the market will be dominated by commodity products in volume terms.

Increasingly, formulators of detergents and other cleaning products are combining lower cost commodity surfactants with higher value specialty products. Such blends allow formulators to achieve the optimal combination of cost and performance and increases the presence of expensive specialty surfactants in areas of the market that have previously been dominated by inexpensive commodity surfactants. New formulations, while often more expensive, appeal to consumers' demand for strong performance with minimal environmental impact and little health effects such as skin irritation.

Amphoteric surfactants and nonionic specialty surfactants (such as sugar-derived surfactants) are expected to show the largest gains going forward in volume terms in the household cleaning product segment. Amphoteric surfactant demand will be supported by their biodegradability and mildness to the skin, both favorable properties in the household cleaning product market. The mildness of amphoteric surfactants is also an important consideration as many cleaning products become more concentrated, increasing the potential for skin irritation. Sugar-derived surfactants are

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TABLE V-4

PERSONAL SOAP MARKET FOR SURFACTANTS (million pounds)

Item	2005	2010	2015	2020	2025
Soap & Body Wash Shipments (mil 2009\$)					
lb specialty surfactant/1000\$ soap					
Specialty Surfactants in Personal Soaps					
By Type:					
Nonionics					
Anionics					
Cationics					
Other Specialty Surfactants					
By Market:					
Bar Soaps					
Liquid Soaps & Body Washes					
\$/lb					
Surfactants in Personal Soaps (mil \$)					
% personal soaps					
Surfactants in Personal Care Products (mil \$)					

Source: The Freedonia Group

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QUATERNARY AMMONIUM COMPOUND SURFACTANT DEMAND (million pounds)

Item	2005	2010	2015	2020	2025
Nondurables Shipments (bil 2009\$)					
lb quats/mil \$ nondurables					
Quaternary Ammonium Compounds					
Cleaning Products					
Personal Care Products					
Industrial Markets					
\$/lb					
Quaternary Ammonium Compounds (mil \$)					
% quaternary ammonium compounds					
Cationic Specialty Surfactants (mil \$)					

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

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Related Studies

Industrial & Institutional (I&I) Cleaning Chemicals

US demand for industrial and institutional (I&I) cleaning chemicals is forecast to rise 2.3% annually to \$11.7 billion in 2020. Growth in commercial revenues and establishments will fuel gains in cleaning chemical demand for the commercial sector. Cleaners used in institutional settings will constitute the fastest growing category. This study assesses the \$10.4 billion US market for I&I cleaning chemicals, providing projections for 2020 and 2025 by market, product and raw material. In addition, the study analyzes company market share and profiles participants in the US industry.

#3424.....June 2016..... \$5300

Lubricants

US demand for lubricants will rise slightly to 2.4 billion gallons in 2020, with a value of \$23.5 billion. As most products move toward higher-quality lubricants, transmission fluids, gear oils, and engine oils will be affected by the lengthening drain intervals associated with improvement in fluid technology. This study presents historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by basestock, formulation, product and market. The study also considers key market environment factors, evaluates company market share and profiles US industry competitors.

#3394.....April 2016..... \$5400

World Lubricants

World demand for lubricants will rise 2.0 percent annually to 45.4 million metric tons in 2019. Growth will be supported by increasing demand for engine oils in new motor vehicles, but will be tempered by longer drain intervals that slow the engine oil aftermarket. The Asia/Pacific market will grow the fastest. This study analyzes the 41.1 million metric ton world lubricant industry, with forecasts for 2019 and 2024 by formulation, product and market for six world regions and 23 major countries. The study also evaluates company market share and profiles industry players.

#3364.....December 2015..... \$6500

Paint & Coatings

US demand for paint and coatings is forecast to grow 3.8 percent annually to 1.4 billion gallons in 2019. Architecture will remain the largest market and grow the fastest. Water-based formulations will remain dominant and continue to gain market share. New technologies such as nanostructured coatings will drive future growth. This study analyzes the 1.2 billion gallon US paint and coatings industry, with forecasts for 2019 and 2024 by market, formulation and substrate. The study also evaluates company market share and profiles industry players.

#3317.....August 2015..... \$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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