Specialty Surfactants

US Industry Study with Forecasts to 2009 & 2014

Study #2032 | February 2006 | $4200 | 229 pages
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**Personal care products will continue to post the fastest increases in specialty surfactant demand due to both healthy existing application growth and further gains in niche markets.**

**US market to reach $3.4 billion in 2009**

Demand for specialty surfactants in the United States will increase 3.1 percent annually to 1.9 billion pounds in 2009, with a value of $3.4 billion. The pace of growth will moderate from the 1999-2004 period, as the cleaning and personal care product markets mature. Nevertheless, personal care products will continue to post the fastest increases due to both healthy existing application growth, and the pursuit of product diversification as companies seek further gains in niche markets. Advances in industrial markets will be near average as a rebound in some segments helps overcome market maturity or weakness in others, while the cleaning product sector will experience the slowest gains.

**Personal care products to remain dominant market**

Continued above average growth in personal care applications will be relatively broad-based, although specialty surfactant demand in bar soaps will remain flat. Volume growth in liquid body and hand soaps, product differentiation and a move toward milder formulations will be key growth drivers. In industrial markets, strong demand in plastics, paints and coatings, food and beverages, and other markets such as oil and gas well drilling will offset global competition-induced weakness in textiles and agricultural chemicals. Most markets will benefit from an improved manufacturing sector. Growth in the cleaning product market will be constrained by market maturity and a tough, competitive environment. Growth in industrial and institutional cleaning supplies will offset some of the weakness, but their market share is relatively small.

**Amphoteric, anionic types show best prospects**

Cationic, anionic and nonionic surfactants will remain the three largest product types, reflecting their established presence in the market. The best opportunities will be found in amphoteric and anionic specialty surfactants due primarily to rising use in the personal care industry. Fluorosurfactants are expected to show the strongest growth, albeit from a small base. Cationics will experience average gains, led by quaternary ammonium surfactants, as weakness in key consumer markets offsets robust advances in personal care. Silicone and nonionic specialty surfactants will experience the slowest growth, restrained by their greater presence in the cleaning product market.
Bar Soaps -- Demand for specialty surfactants in bar soaps is expected to remain relatively flat, growing slightly to 145 million pounds in 2009. In an attempt to increase market share, bar soap manufacturers are incorporating synthetic surfactants into their products which are milder and skin conditioning compared to those in liquid hand soaps.

Historically, bar soaps have contained more real soap. Over time, however, manufacturers began increasing the use of synthetic surfactants that offered improved performance at a lower price point. At the higher end of the market, manufacturers like Dove make use of isethionates that have a more neutral pH and hence are milder on the skin than traditional soap. Due to consumer preference for these milder formulas, isethionates have also made their way into an increasing number of bar soaps. Unilever, which makes Dove as well as Lever 2000, is one of the largest producers of isethionates, which it uses for captive consumption. Other manufacturers of isethionates for bar soaps include BASF, Clariant and Rhodia.

Besides isethionates, a number of other specialty surfactants are used in bar soaps, including fatty alkanolamides, sarcosinates and sulfosuccinates, though to a much smaller degree. Typically they are found in specialty cleansing bars, or other products aimed at smaller market niches.

Liquid Soaps & Body Washes -- Specialty surfactant demand in liquid and other personal soaps will expand 5.4 percent annually to 130 million pounds in 2009, benefitting from continued gains in antimicrobial hand soaps amid heightened consumer awareness of diseases such as avian influenza (bird flu). The recent launch of several high foaming hand cleansers will also benefit demand.

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TABLE VII-2

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<td>12570</td>
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<td>Cationic Surfactant Demand</td>
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<td>Quaternary Ammonium Salts</td>
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<td>730</td>
<td>955</td>
<td>1160</td>
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<td>Specialty Surfactant Demand (mil $)</td>
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<td>2810</td>
<td>3425</td>
<td>4220</td>
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Sample Pages, Tables & Charts

COMPANY PROFILES

Cytec Industries Incorporated
Five Garret Mountain Plaza
West Paterson, NJ 07424
973-357-3100
http://www.cytec.com

Sales: $1.7 billion (2004)
Key Products: sulfosuccinate surfactants

Cytec Industries is a vertically integrated specialty chemicals and materials company that operated in four segments in 2004: Water and Industrial Process Chemicals, Specialty Materials, Performance Products, and Building Block Chemicals. In March 2005, the Company acquired Belgium-based UCB SA’s Surface Specialties business, which had 2004 sales of $1.4 billion, for $1.8 billion in cash and stock. As a result of the transaction, UCB holds a 12.5-percent stake in Cytec, which reorganized into four segments: Performance Specialties, Surface Specialties, Engineered Materials and Building Block Chemicals.

In 2004, the Company participated in the specialty surfactants industry through the Performance Products segment, which had 2004 sales of $565 million. Among the operations included in this segment is Cytec’s Specialty Additives business, which produces surfactants, specialty monomers and crosslinkers. In particular, the business is a leading producer of anionic sulfosuccinate surfactants, which are sold under the AEROSOL, SOLUSOL, COMPLEMIX and DOCUSATE brand names. These chemicals are employed in various applications, including emulsion polymer synthesis, personal care products, food processing and pharmaceuticals.

TABLE VI-1
INDUSTRIAL MARKETS FOR SPECIALTY SURFACTANTS (million dollars)

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<td>Nondurable Goods Shpts (bil 2000$)</td>
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<td>1923</td>
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<td>lbs surfactant/mil $ nondurables</td>
<td>113</td>
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<td>Surfactants in Industrial Mkts (mil lb)</td>
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<td>$/lb</td>
<td>1.75</td>
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<td>Food &amp; Beverages</td>
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<td>Plastics</td>
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<td>Paints &amp; Coatings</td>
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<td>Textiles</td>
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<td>Pulp &amp; Paper</td>
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<td>Agricultural Chemicals</td>
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<td>Other Industrial Markets</td>
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<td>% industrial markets</td>
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<td>Specialty Surfactant Demand</td>
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CHART VIII-1
SPECIALTY SURFACTANT MARKET SHARE, 2004 ($2.8 billion)

Market Leaders 65.2%
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<tr>
<td>Additional Print Copies @ $500 each *</td>
<td>$5200</td>
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<tr>
<td>Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)</td>
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<td>Bill my company</td>
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Name ____________________________

Title ____________________________

Company _________________________

Division _________________________

Street ____________________________

City/State/Zip ____________________

Country _________________________

Phone __________________________

Fax _________________________

Email __________________________

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Other Studies

World Oilfield Chemicals
Global demand for oilfield chemicals will rise 5.9% annually through 2010, driven by sustained growth in drilling activity. The dominant North American market will register healthy gains as producers strive to maintain production. Drilling fluids will remain the largest type while well stimulation chemicals will lead gains. This study analyzes the $10.9 billion world oilfield chemical industry for 2010 and 2015 by type, world region and for 25 countries. It also details company market share and profiles major players.

Cosmetic & Toiletry Chemicals
US cosmetic and toiletry chemical demand will grow 5.4% yearly through 2010. An aging and increasingly ethnically diverse population along with consumer desires to offset the effects of aging and preferences for “natural” products will drive demand. Active and plant-derived ingredients will benefit the most from these factors. This study analyzes the $5.9 billion US cosmetic and toiletry chemical industry to 2010 and 2015 by product, function and market. It also profiles major players and evaluates market share.

Silicones
Silicone demand in the US will grow 4.7% annually through 2010, driven by performance and environmental advantages over acrylic, polyurethane and rubber. Silicone fluids will remain the largest type while silicone gels will grow faster based on renewed growth in the electronics sector. This study analyzes the $3 billion US silicone industry to 2010 and 2015 by product and market. It also considers market environment factors, details industry structure, evaluates market share and profiles major manufacturers.

Disinfectant & Antimicrobial Chemicals
The US disinfectant and antimicrobial chemical market will grow 5% yearly through 2009 based on concerns about bacterial and pathogenic threats. Phenolic compounds, iodophors, nitrogen compounds and organometallics will remain the top products. The dominant disinfectant segment will outpace antimicrobials. This study analyzes the $2 billion US disinfectant and antimicrobial chemical industry to 2009 and 2014 by product and market. It also evaluates market share and profiles major competitors.

World Enzymes
World demand for enzymes will grow 6.5% annually through 2009. Specialty types will generally outpace industrial enzymes, though the market for animal feed enzymes will grow the fastest. Developing countries such as China, India, South Korea and Taiwan will offer some of the best growth opportunities. This study analyzes the $3.7 billion global enzymes industry to 2009 and 2014 by type, market, world region and for 13 countries. It also evaluates company market share and profiles leading producers.

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