

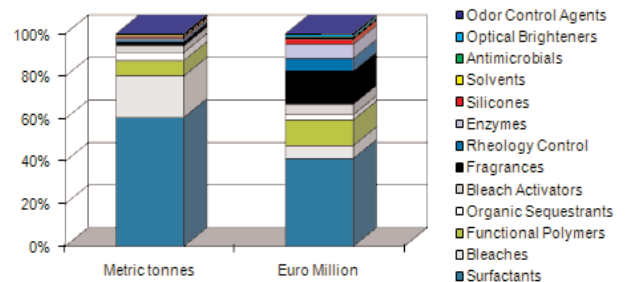
# Chemicals for Household Industrial and Institutional Cleaning Applications Database: Europe

## 2010 Fact Sheet

### The Market

In 2009, chemicals used in household, industrial, and institutional cleaning applications were in excess of 2.2 million tonnes, including commodity surfactants and bleach such as hypochlorite. Surfactants dominate the cleaning chemicals market with 60% market share.

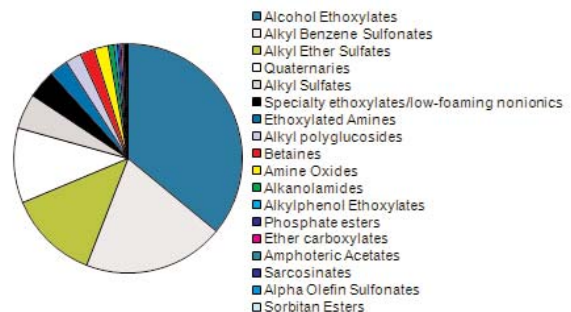
Market Breakdown for HI&I Cleaning Chemicals by Chemical Category in Europe, 2009



Surfactant Breakdown for HI&I Cleaning Chemicals by Product in Europe, 2009

### Surfactants

Commodity surfactants dominate with alcohol ethoxylate consumption reaching nearly 550,000 tonnes. Leading specialties include quaternaries and amine oxides. Fabric care accounts for 58% of surfactants consumption. Key segments include laundry detergents, fabric softeners, and fine wash products.



### Future Outlook

Chemical consumption in household, industrial, and institutional cleaning applications is forecast at nearly 2% volume compound annual growth rate from 2010 to 2014. Chemical consumption in household cleaning applications will slightly exceed this. Chemical consumption is largely tracking the end-use industries within Household cleaning and I&I cleaning chemicals. However, some chemical categories are benefiting from additional drivers, such as enzymes, which have replaced bleach in the main brands, in particular in liquid and concentrate products.

Volume Growth by Product Category in Europe, 2010 to 2014

