

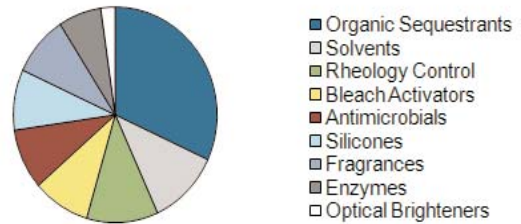
Chemicals for Household Industrial and Institutional Cleaning Applications Database: United States

2010 Fact Sheet

The Market

In 2009, chemicals used in household, industrial and institutional cleaning applications were in excess of 1,300 million lb. Household, industrial, and institutional cleaning applications include fabric care, hard surface cleaners, floor care, and dish care. Surfactants, including only specialty surfactants in this dataset, is the leading chemical group, followed functional polymers. Bleach data, along with commodity surfactants, are also included within the database, however; they are excluded from this fact sheet.

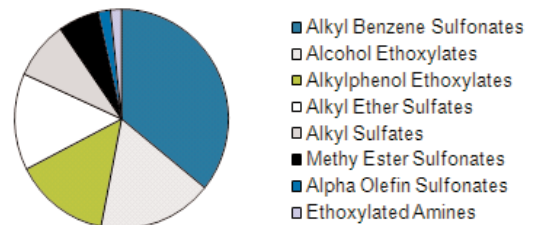
Market Breakdown for HI&I Cleaning Chemicals by Chemical Category in the USA, 2009



Commodity Surfactants

Usage of commodity surfactants in household, industrial, and institutional cleaning applications is approaching 2,500 million lb in the United States. Alkyl benzene sulfonates account for the major share, with 70% of the volume used within laundry detergents.

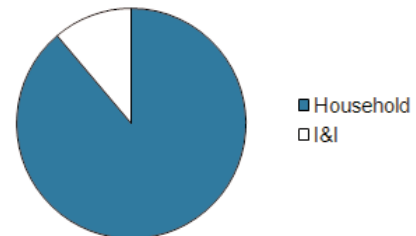
Commodity Surfactant Breakdown for HI&I Cleaning Chemicals by Product in the USA, 2009



Application Trends

Chemicals for household cleaning account for the major share of the market (Note: Research scope is focused on specialties). Key trends occurring in the market are reduction in the use of phosphates (driven by legislation), substitution of select chemistries with enzymes, and development of greener chemistry.

Market Breakdown by Major End Use in the USA, 2009



Future Outlook

Chemical consumption in household, industrial, and institutional cleaning applications is forecast at 2.9% volume compound annual growth rate from 2010 to 2014. Chemical consumption in household cleaning applications will slightly exceed this. In the USA phosphate replacement in automatic dishwasher detergents is an increasingly important issue. Phosphates were banned in these products in a number of states beginning July, 2010. Formulators will be seeking functional replacements for phosphates.

Volume Growth by Product Category in the USA, 2010 to 2014

