Ingredients for Household, Industrial, and Institutional Cleaning Applications

Published 4th Quarter 2018
Base Year: 2017-2018
Forecasts to 2022 and 2023

Traditionally an interesting market due to rather strong and steady growth, the market of ingredients for household, industrial, and institutional (HI&I) cleaning applications is going through changes in various regions of the world. Innovation in dosage forms, increasing disposable income in developing countries, increasing importance of the green trends, and environmental regulations are some of the key trends driving change in the market and reshaping it. This program provides you with both an overall and detailed understanding of where are the opportunities for ingredients suppliers in this complex and long-term growing marketplace.

This Program Helps Subscribers to Answer Key Questions Such as:

- What are the sales of ingredients for HI&I applications by ingredient and end use in each region?
- What suppliers are active, which HI&I ingredients are they supplying, and what is their market share?
- What are the average prices of various ingredients by applications?
- What are the key differences between household and I&I applications, and what are the market drivers for each?
- What is the forecast consumption for each ingredient by 2022 by application and region?
Database Scope

Ingredients for Household, Industrial, and Institutional Cleaning Applications provides a detailed quantitative appraisal of the market, including current and forecast demand by major product, pricing analysis, competitive analysis, competitive landscape, and supplier share. The quantitative analysis comes in the format of a fully interactive and enhanced database. Regional summaries are provided to feature market drivers, latest trends, and regulatory issues. The ingredients covered in the scope of this program are grouped within the following categories (Table 1 presents a more detailed product scope):

- Antimicrobials
- Bleach
- Bleach activators
- Enzymes
- Fragrances
- Functional polymers
- Odor control agents
- Optical brighteners
- Organic sequestrants
- Rheology control agents
- Specialty silicones
- Solvents
- Surfactants

The interactive functions of the database allows users to customize views according to region, chemical type, application, and supplier. Data available includes the following:

- Consumption of HI&I ingredients by application (listed in the Table 1) and region
- Consumption in household applications vs I&I applications
- Supplier sales by chemical type and region
- Average market pricing of chemical by region
- Forecast consumption within a five-year time-frame

The base year for this program is 2017-2018 and includes forecasts to 2022-2023.

<table>
<thead>
<tr>
<th>Table 1: Household, Industrial, and Institutional Application Segmentation</th>
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<tbody>
<tr>
<td><strong>Laundry Care</strong></td>
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<tr>
<td>Bleaches and laundry boosters</td>
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<tr>
<td>Powder laundry detergents</td>
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<tr>
<td>Liquid laundry detergent</td>
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<tr>
<td>Fabric softeners</td>
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<tr>
<td>Prewash stain removers</td>
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<td>Water conditioners</td>
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Key Benefits

This global program enables marketing and product managers and directors within ingredients suppliers serving the HI&I cleaning products industry to understand the evolution of the market in each significant region, product group, and application. As a result, subscribers will be better positioned to exploit identified business opportunities at a day-to-day operational level and during the strategic planning process. This program provides subscribers with:

- A reliable and independent assessment of the market for ingredients within household, industrial, and institutional cleaning products, enabling each subscriber to understand the context in which each regional business operates
- Identification of key growth by product and application to enable development of targeted sales and marketing strategies to exploit high growth areas
- Forecasting scenarios from which to base solid strategic business plans
Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 50-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

Primary Research

We Know Who to Talk to. We Know How to Listen.

A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Marketers/manufacturers
- Distributors
- Government agencies
- Retailers
- Suppliers
- Trade organizations

Secondary Research

We Know Where to Look – Mining the Details.

Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

Comprehensive Market Intelligence

We Know How to Verify.

Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for over 50 years.

A FULL SPECTRUM OF SERVICES

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MANAGEMENT CONSULTING

<table>
<thead>
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