



1st Edition

# Industrial Surfactants: Multi-regional Market Analysis and Opportunities

China - Published November 2016

Europe - Published July 2016

United States - Published August 2016

Base Year: 2015

Forecasts to 2020

Regional Coverage: China ■ Europe ■ United States

Cleaning applications, consisting of notably laundry detergents and fabric softeners, and personal care applications represent about two-thirds of the global consumption of surfactants. The remaining one-third is scattered among a number of industrial applications, such as food, paints and coatings, crop protection, and oil and gas. This report focuses on these industrial applications often offering strong growth opportunities, but also driven by complex, application-related drivers, whose identification is key for building a successful, targeted business strategy.

## This Report Helps Subscribers to:

- Assess regional consumption of surfactants in each application and by product type
- Understand performance requirements from different end-use applications, and how they are being met
- Determine key surfactants used in each application and find out if substitution is occurring
- Identify the leading suppliers for different surfactants by region and application
- Understand the key growth drivers and restraints in different end-use segments
- Evaluate the growth potential for surfactants and market opportunities



# Report Contents

## Introduction

### Executive Summary

- An overview of key findings

### End-use Analysis

For each application covered (Table 1), the following information is provided:

- Market overview
  - Market sizing, key trends, key players
  - Regulatory overview
- Product overview
  - Grades and prices
  - Levels of use
- Market sizing
  - Estimated consumption volume/value by product type
- Competitive landscape
  - Industry structure
  - Supplier market share
  - Porter’s Five Forces
- Appraisal and outlook
  - Growth drivers and constraints

## Product Analysis

For each major surfactant class covered (Table 2), the following information is provided:

- Estimated consumption in volume and value by end use
- Supplier market shares
- Five-year forecast and rationale

## Supplier Profiles

Detailed profiles of 10 leading and niche local manufacturers of surfactants are provided, including the following information:

- Overview
- Surfactants sales
- Grades
- Capacities
- Raw materials
- Sales and marketing
- Technical capabilities
- Outlook

**Table 1: End-use Applications Included within the Scope**

Crop protection

Food

Lubricants

Metalworking fluids

Oil and gas

Mining

Paints and coatings

Paper

Pharmaceuticals

Synthetic latex polymers

Textile

Minor end-uses





Table 2: Surfactants Included within the Scope	
Surfactants class	Surfactant
Amphoterics	Amphoacetates
	Alkyl amido betaines
	Others
Anionics	Acyl isethionates
	Alkyl aryl sulphonates
	Alkyl ether sulphates
	Alkyl sulphates
	Fatty acid soaps
	Phosphate esters
	Sarcosinates
	Sulfosuccinates
Cationics	Taurates
	Others
	Quaternary ammonium compounds
Nonionics	Ester quats
	Others
	Alkalonamides
	Alkyl polyglucosides
	Amine oxides
	Esters emulsifiers
	Fatty alcohol ethoxylates
	Fatty amine ethoxylates
	Lower alcohol ethoxylates
Polyalkylene glycols	
Others	



## Scope

Industrial Surfactants provides a detailed independent appraisal of the three key global (China, Europe, and the United States) markets including current and forecast demand by major product and end-use industry, product grades and prices, applications, distribution channels, supplier sales, and technical and market trends. This program comes as two key deliverables: a detailed report for each of the regions considered providing a comprehensive quantitative and qualitative analysis of each market and a fully interactive database for customization with the data.

- Consumption of key surfactants by end-use application and region
- Detailed demand analysis of surfactants by end-use market and region
- Supplier sales by surfactant, application, and region
- Average market pricing
- Forecast consumption of surfactants through 2020

## Key Benefits

This report assists surfactants suppliers in identifying opportunities within the global industrial surfactants market. It also serves as an invaluable tool in the strategic planning process. This report series provides subscribers with:

- Identification of key growth potential by surfactant, application, and geography to enable development of targeted sales and marketing strategies
- An appraisal of market trends, supply, and demand drivers enabling subscribers to position their polymers to maximize trends within the market
- Competitive intelligence for use in benchmarking
- Forecasting scenarios from which to base solid strategic business plans
- A tool to develop market-entry and market expansion strategies



## 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 procurement and assessment, 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.

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