



7th Edition

Food Processing Cleaning Products: U.S. Market Analysis and Opportunities

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Base Year: 2018

Forecasts to 2023

Regional Coverage: United States

A comprehensive analysis of the market for food processing cleaning products used in industrial settings, including end users' usage patterns, market trends, and sales and market share of leading suppliers. This report is a companion to Kline's Foodservice Cleaning Products study, where commercial kitchen cleaning chemicals are profiled.

This Report is Designed to:

- Provide subscribers with a complete qualitative and quantitative analysis of major end-use markets and product categories.
- Deliver comprehensive analysis of the food processing cleaning market including sales, growth, and market shares of leading suppliers.
- Assess industry dynamics and key trends, including business implications.
- Give an overall business outlook and appraisal with five-year forecasts through 2023.
- Profile major industry suppliers, to be used for competitive benchmarking as well as identifying potential merger and acquisition candidates.
- Use a sizeable sample (approximately 600) of structured research with end use decision makers to yield key insights, including usage patterns, critical buying factors, and channels of distribution trends.



Tentative Report Contents*

Introduction

- Scope
- Geographic regions
- Sources and methods
- Assumptions and remarks

Executive Summary

- Industry overview
- Market size and segmentation
- Analysis and consumption by:
 - End-use segment (see Table 2)
 - Product class and category (see Table 1)
 - By method of cleaning (CIP, COP, and environmental)
- Trends and opportunities
- Impact of food processing and sanitation trends on cleaning chemicals sales
- Competitive landscape/supplier
- Critical buying factors
- Buying practices
- Outlook and appraisal

Product Category Profiles

Pertinent information and insightful analysis of each of the categories shown in Table 1, including the following information:

- Market trends and usage frequency
- Market size in 2017 and 2018
- Sales by end-use segment (see Table 2)
- Sales by leading suppliers (see Table 3)
- Outlook and assessment to 2023

Company Profiles

Profiles of approximately 40 leading manufacturers will include the following information:

- Overview of business
- Corporate sales (if public)
- Food processing cleaning chemicals offered
- Sales of food processing cleaning products in 2017 and 2018
- Market share in 2017 and 2018
- Merger/acquisition activity of note
- How products are sold to end users
- Forecast of future sales through 2023

* Subject to charter subscriber input





Table 1: Product Classes and Categories Profiled

Caustic soda
 Cleaners and detergents (both alkaline and acids)
 Conveyor lubricants
 Direct food antimicrobials
 Sanitizers

Table 2: End-use Segments Surveyed

Baking
 Beverage processing
 Dairy farms
 Dairy processing plants
 Egg processing plants
 Hog and poultry farms
 Meat and poultry processing plants
 Processed foods
 Miscellaneous-a
 a- Includes animal food manufacturing, grain and oilseed milling, sugar and confectionery manufacturing, seafood, and others.

Table 3: Companies to be Profiled

Ace Chemical
 Alpha Chemical
 Anderson Chemical
 Betco
 Birko Corporation
 Boumatic
 Buckeye International
 Chemetall (BASF)
 Chemstar
 Chemstation
 Colgate-Palmolive
 Delaval
 Diamond Chemical Company
 Diversey
 Ecolab
 Hillyard
 Hydrite Chemical Company
 IBA Dairy Supplies
 Kimberly-Clark
 Madison Chemical Company
 Neogen Corporation
 Nyco Products
 Packers Sanitation Services Inc. (PSSI)
 Pariser Industries
 Pro Chemicals
 Procter & Gamble Professional
 Rochester Midland Corporation
 Shepard Brothers
 Spartan Chemical
 State Industrial Products
 Sunburst
 Thatcher Group
 Troy Chemical
 Westfalia-Surge
 Zep/AFCO



Scope

Food Processing Cleaning Products: U.S. Market Analysis and Opportunities represents the sixth edition of this report for Kline & Company. Previous editions were published by Kline & Company periodically from 1987-2005, with an independent assessment conducted by long-time Kline associate, Boynick Consulting, in 2009. With this study, we aim to understand how industry consolidation impacts the market and how changes in the business affect growth opportunities, including value-added service requirements that vary by end-use segment and continue to evolve, product usage trends and frequency, and sales and growth of major suppliers. The study concludes with a five-year forecast for this market. The report covers the U.S. market for industrial food processing cleaning chemicals with sales data for products and companies in 2017 and 2018. Food processing cleaning equipment, tools, and machinery are not included in this report.

Key Benefits

This study provides subscribers with accurate and current information and insights about the industrial food processing cleaning market, profiles of major companies, and extensive research with commercial end users to understand the size of the market, key usage trends, and how market trends impact sales of food processing cleaning chemicals. Specifically, this report offers subscribers a comprehensive assessment of the following:

- The size of food processing cleaning products and relative rates of growth for specific end uses and leading companies.
- The relative size of suppliers and their market shares, and how that changes over time.
- Key trends, cleaning methods, and usage patterns and how they differ by end-use segment.
- Trends pertaining to food processing and sanitation regulations, and their impact on the cleaning chemicals market.
- End users' preferences for channels of distribution and critical buying factors
- Forecast sales and expectations for these products in the future.



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. Approximately 600 structured surveys of end users are conducted to assess cleaning products for the food processing industry, market trends, usage, and cleaning methods. In addition, in-depth discussions with suppliers, distributors, trade organizations, and others knowledgeable in the industry are conducted.

- End users
- Suppliers
- Distributors
- 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.

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North America
+1-973-435-3407

Latin America
+55-11-3079-0792

Europe
+32-2-770-4740

China
+86-21-6012-6500

India
+91-124-4546-100

Japan
+81-3-3242-6277