Market Study: Surfactants
(3rd edition)
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Success

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Surfactants can form a foam, facilitate the removal of dirt, and enable the mixture of water and oil. Despite concerns of environmentalists, these surface active chemicals are found in almost every household and are also used in numerous industrial applications. In 2016, a worldwide turnover of USD 31 billion was achieved. For the third time already, Ceresana analyzed the global market: The latest report expects an AAGR of 3.1%.

Surfactants are made from petroleum derivatives but can also be obtained from natural raw materials such as sugar, vegetable oils or vegetable soaps. The types of surfactants mainly differ in opposed polarity and different charges. The study examines anionic, cationic, non-ionic, and other surfactants. Important figures such as demand, import, and export are given both for these main groups and for individual product types. Anionic surfactants are currently the most important group with a global market share of 49%. However, the strongest growth market are non-ionic surfactants. Fatty alcohol ethoxylates (FAEO) dominate this type.

Asia-Pacific is by far the largest consumer of surfactants with a world market share of 38%. There are clear differences in regard to the used product types: While Asia accounted for a market share of 43% of alkylbenzene sulfonates (LAS) in 2016, consumers in Western Europe and North America dominate the market for alkyl sulfates (FAS), alkyl ether sulfates (FAES), and alcohol ethoxy sulfates (AES) with a share of 60%.

Surfactants are used in numerous applications. The best-known applications are cleaners and detergents for households as they help to remove dirt as washing-active substances. Around 55% of the demand in 2016 was registered by this segment. Besides the segments cleaners and detergents, cosmetics, and textiles, surfactants are also used in numerous industrial applications. For paints and plastics, Ceresana expects the highest global increase of 2.1% p.a. until 2024.

While demand for laundry detergent in form of powder developed more weakly in the past years, the market for liquid and highly concentrated detergents accounted for a significant growth. In dishwashing detergents, tablets account for a considerable growth. A decisive factor for the development of the cosmetics industry is the rise of private consumption. The increasing demand for surfactants on the part of the cosmetics industry can be explained by the growing awareness of personal body hygiene and the available income that has been increasing in many countries in the past years. This trend is additionally reinforced by the increasing sales of products with natural and organic ingredients.

The Study in Brief:
Chapter 1 provides a description and analysis of the global market - including forecasts up to 2024: The development of revenues, production, and demand is analyzed for each world region. The figures are split by anionic, cationic, non-ionic, and other surfactants. In addition, there is a further division into product subsegments. Chapter 2 examines the market in the 31 major countries in detail: Revenues, demand, production, as well as import and export are evaluated per product types. Demand for surfactants of the individual applications is described in detail. In Chapter 3, the application areas are examined for Western and Eastern Europe, North and South America, Asia-Pacific, The Middle East, and Africa. Data on the development of demand are analyzed for the applications detergents and cleaners, industrial cleaners, personal care and cosmetics, textiles and leather, paints and plastics, and other applications. In Chapter 4, demand for individual types is analyzed. Anionic, cationic, non-ionic, and other surfactants are considered separately. Additionally, a further subdivision of the group anionic surfactants into LAS, FAS/ FAES/ AES, and other anionic surfactants is made. The segment non-ionic surfactants is split by FAEO, other ethoxylates, and other non-ionic surfactants. Chapter 5 provides company profiles of the 92 largest manufacturers of surfactants – clearly arranged according to contact details, revenues, profit, product range, production sites, and profile summary. These producers include Royal Dutch Shell plc, General Electric Company, BASF SE, The Procter & Gamble Company, DowDuPont Inc., 3M Company, Akzo Nobel N.V., Evonik Industries AG, and Solvay S.A.

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1.6.3 Production

In Asia-Pacific, around X million tonnes of surfactants were produced in 2016. We forecast total production volume to increase at an average rate of X% p.a. between 2016 and 2024 and to amount to almost X million tonnes of surfactants in 2024.

### Market data for 7 regions and 31 countries:

- Demand for surfactants per product type: LAS; FAS/FAES/AES; FAEO, and others
- Revenues and production split by:
  - Anionic Surfactants
  - Cationic Surfactants
  - Non-ionic Surfactants
  - Other Surfactants

### Table: Production of surfactants in Asia-Pacific from 2008 to 2024 – split by surfactant types

<table>
<thead>
<tr>
<th>Year</th>
<th>Anionic Surfactants</th>
<th>Cationic Surfactants</th>
<th>Non-ionic Surfactants</th>
<th>Other Surfactants</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X</td>
<td>X</td>
</tr>
<tr>
<td>2010</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X</td>
<td>X</td>
</tr>
<tr>
<td>2012</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X</td>
<td>X</td>
</tr>
<tr>
<td>2014</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X</td>
<td>X</td>
</tr>
<tr>
<td>2016</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X</td>
<td>X</td>
</tr>
<tr>
<td>2018p</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X</td>
<td>X</td>
</tr>
<tr>
<td>2020p</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X</td>
<td>X</td>
</tr>
<tr>
<td>2022p</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X</td>
<td>X</td>
</tr>
<tr>
<td>2024p</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X X</td>
<td>X X X X X X X X X</td>
<td>X</td>
</tr>
</tbody>
</table>

### Graph: Revenues generated with surfactants in Germany from 2008 to 2024 in billion USD and billion EUR.

2.1.3.2 Products and Applications

The most important sales market for surfactants in 2016 was the segment detergents and cleaners. Within the next eight years, demand for surfactants in the segment personal care and cosmetics will experience the most dynamic development at rates of X% p.a.
3.1.1 Detergents and Cleaners

The global market for household detergents and cleaners includes all-purpose laundry detergents, mild detergents, fabric softeners, detergent additives, multi-purpose and surface cleaners, scouring agents, sanitary cleaners, dishwashing detergents, and bleaching agents as well as care products for wood, leather, and metals. In 2016, almost X million tonnes of surfactants were used for the sales market detergents and cleaners.

Thus, demand for surfactants in this application area had risen by an average of X% p.a. since 2008. Given an expected X% p.a. increase, the sector detergents and cleaners will amount to approx. X million tonnes in 2024.

In the upcoming eight years, we expect the most dynamic development to take place in Asia-Pacific. Demand in this region will increase by, on average, X% p.a. to approx. X million tonnes in 2024. Compared to 2016, this corresponds to an average increase of approx. X% per year.

In 2016, global demand for non-ionic surfactants amounted to X million tonnes. Thus, the largest consumer of non-ionic surfactants is Asia-Pacific, accounting for roughly X% of global demand. In Europe, the most significant consumer is Western Europe, accounting for approx. X% of global demand.

Demand in 2016 for non-ionic surfactants in the covers all product types:

- Alkyl Benzene Sulfonates [LAS]
- Alkyl Sulfates / Alkyl Ether Sulfo-nates / Alcohol Ethoxylates [FAS/ FAES/ AES]
- Other Anionic Surfactants
- Cationic Surfactants
- Fatty Alcohol Ethoxylates [FAEO]
- Other Ethoxylates
- Other Non-Ionic Surfactants
- Other Surfactants

The largest consumer market for surfactants are cleaners and detergents: Laundry detergents, fabric softeners, dishwashing detergents, carpet cleaners, industrial cleaners (mainly automotive & building cleaners), and disinfectants in numerous different forms. Linear alkyl benzene sulfonates (LAS), alcohol ethoxylates (APE), and biocidal quats are the most widely used products in this category. However, research is carried out to replace them for environmental reasons. In general, there is a higher request for...
This study is useful for:

- Producers, distributors, and converters of anionic, non-ionic, cationic, and amphoteric surfactants, LAS, FAS, FAES, AES, FAEO, SLS, SLES, phosphate, sulfosuccinate, fatty alcohols
- Companies operating in the fields of: Household cleaners & detergents, industrial cleaners & detergents(all-purpose laundry detergents, mild detergents, fabric softeners, detergent additives, multi-purpose and surface cleaners, scouring agents, sanitary cleaners, dishwashing detergents, bleaching agents, care products for wood, leather, and metals)
- Personal care & cosmetic products (deodorants, tooth paste, foam baths, shower gel, shampoo, conditioner, lotions, hair dyes)
- Textile and leather, paints, plastics, agrochemicals, photo and oil field chemicals, construction materials, food, adhesives, lubricants, metalworking, mining, pulp and paper
- Associations and institutes, investors and consultations
- Executive board, technology and production, strategic planning, corporate development, R&D, market research, marketing, sales and distribution, procurement

Chapter 5: Detailed profiles of the most important producers, such as 3M, Akzo Nobel, BASF, DowDuPont, Evonik, General Electric, Procter & Gamble, Shell and Solvay.

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- Polyethylene (HDPE) - World
- Polyethylene (LDPE) - World
- Polyethylene (LLDPE) - World
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- Polystyrene - World
- Polystyrene & Expandable PS - World
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- Printing Inks - World
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