Market Study: Surfactants

(2nd edition)






Ceresana
Market Intelligence. Consulting.

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- **Gain new customers**
  Our studies show who are potential new customers and where you can find them
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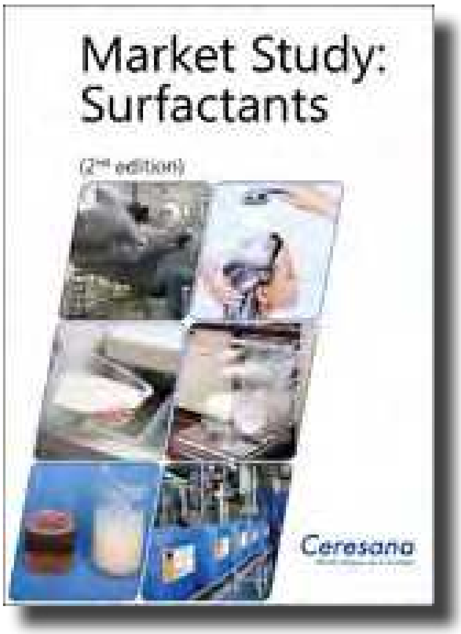
- **Obtain a more detailed picture of your segment**
  Learn which time is the best for entering or leaving a market
- **Have a look at the future**
  Find out if new investments and technologies are worthwhile and how to gain access to future markets. We also show possible market scenarios
- **Recognize opportunities and risks**
  Identify opportunities and risks on your target markets in time

This study is useful for producers, distributors & converters of:

- Anionic, non-ionic, catonic and amphoteric surfactants, LAS, FAS, FAES, AES, FAEO, SLS, SLES, phosphate, sulfosuccinate, fatty alcohols, alkylpolyglycoside, cocamide, amines...
- Household & industrial cleaners & detergents (all-purpose laundry detergents, mild detergents, fabric softeners, detergent additives, multi-purpose cleaners, sanitary cleaners, dishwashing detergents, bleaching agents, care products
- Body 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
- Executive board, technology and production, strategic planning, R&D, market research, marketing, sales & procurement

In this brochure you will find information on the Market Study Surfactants:

- an introduction on page 3
- a summary of the table of contents on page 4
- In the following, there are example pages from the study
- Please use the form on the last page to easily order your copy or a free reading sample!



Surfactants are surface active chemical substances that are mainly used to improve the properties of water-based formulations. In 2014, a global turnover of 33.2 billion US$ was achieved with surfactants. Ceresana expects annual revenues to increase by 2.5% p.a. to around 40.4 billion US$ until 2022.

Growth market for industrial applications and care products

Surfactants are used in numerous application areas. The most known applications of surfactants are cleaners and detergents for households as they help to remove dirt as washing-active substances. Around 56% of the overall demand in 2014 accounted for this segment. Besides in the segments cleaners and detergents, cosmetics and textiles, surfactants are also used in numerous industrial application areas. For the application area paints and lacquers, we expect the highest global increase of approx. 2.6% p.a. until the year 2022.

Anionic versus non-ionic

The types of surfactants mainly differ in opposed polarity and different charges. This study provides information and figures on demand, import and export for the main segments (anionic, cationic, non-ionic and other surfactants) as well as for individual product types. The commercially most significant type of surfactants is currently the anionic surfactant alkyl benzene sulfonate [LAS] with a global market share of 53%. The strongest growth market are the non-ionic surfactants, where fatty alcohol ethoxylates [FAEO] dominate.
The Asia-Pacific region is by far the largest consumer of surfactants with a world market share of more than 36%. There are clear differences with regard to the used product types. For alkyl benzene sulfonate, Asia reached a market share of more than 43% in 2014. However, consumers in Western Europe and North America dominate the market for alkylsulfates (FAS), alkyl ether sulfates (FAES) and alcohol ethoxy sulfates (AES) with a share of 62%.

The Study in Brief:

Chapter 1 provides a presentation and analysis of the market for surfactants, including forecasts up to 2022: revenues development as well as production and demand volumes are analyzed. These figures are split by anionic, cationic, non-ionic and other surfactants. In addition, there will be a further division into product subsegments.

Chapter 2 examines the market for surfactants in the 31 major countries in more detail: Data on demand, revenues, production, import, and export is provided. Demand for surfactants of the individual applications is described in detail.

Chapter 3: Here, the application areas of surfactants for the regions Western and Eastern Europe, North and South America, Asia-Pacific, the Middle East and Africa are examined. Data on the development of demand are analyzed for the applications cleaners and detergents, industrial cleaners, body care and cosmetics, textiles and leather, paints and plastics and other applications

In Chapter 4, demand for individual types of surfactants is analyzed. In particular anionic, cationic, non-ionic and other surfactants are considered. Also, a further subdivision of the group anionic surfactants into alkyl benzene sulfonates [LAS], alkylsulfates, alkyl ether sulfates/ alcohol ethoxy sulfates [FAS/ FAES/ AES] and other anionic surfactants is made. The segment non-ionic surfactants is split by fatty alcohol ethoxylates [FAEO], other ethoxylates and other non-ionic surfactants (for example pure fatty alcohols, alkylpolyglycosides).

Chapter 5 provides profiles of the largest producers of surfactants, clearly arranged according to contact details, turnover, profit, product range, production sites, and profile summary.

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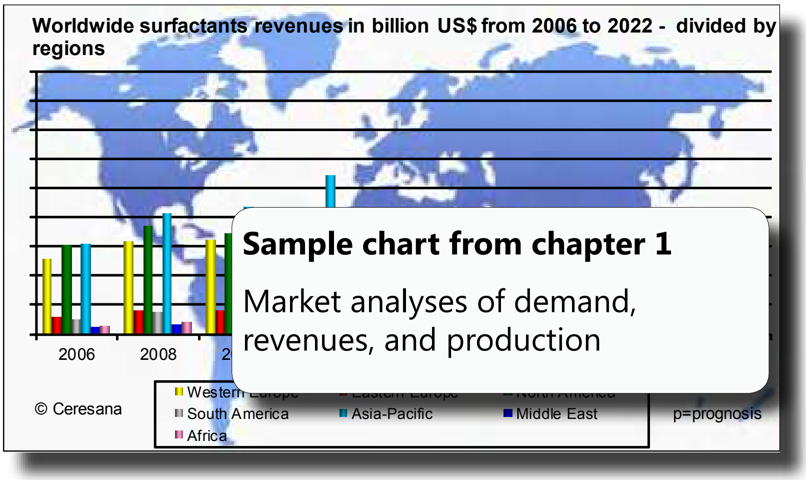

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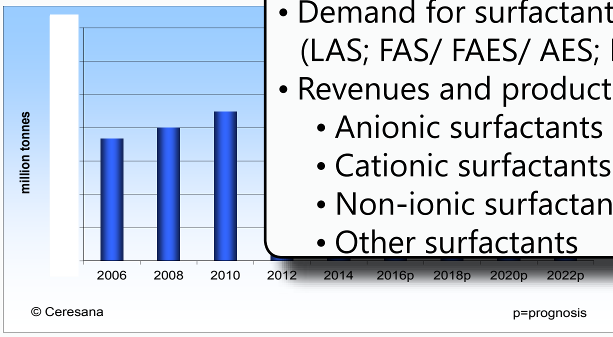
1.6.3 Production – Asia-Pacific

In Asia-Pacific, around X million tonnes of surfactants were produced in 2014. We forecast total production volume in Asia-Pacific to increase by, on average, X% p.a. between 2014 and 2022 and to amount to approx. X million tonnes of surfactants in 2022. More than X% of manufactured products

in this country will significantly increa

Chapter 1: Extensive market data on world regions and 31 countries::

- Demand for surfactants of individual product types (LAS; FAS/ FAES/ AES; FAEO and others)
- Revenues and production in:
  - Anionic surfactants
  - Cationic surfactants
  - Non-ionic surfactants
  - Other surfactants



Graph: Production of surfactants in Asia-Pacific from 2006 to 2022

in 1,000 tonnes	2006	2008	2010	2012	2014	2016p	2018p	2020p	2022p	2014-2022
Anionic surfactants	X	X	X	X	X	X	X	X	x	XX% p.a.
Cationic surfactants	X	X	X	X	X	X	X	X	x	XX% p.a.
Non-ionic surfactants	X	X	X	X	X	X	X	X	x	XX% p.a.
Others Surfactants	X	X	X	X	X	X	X	X	x	XX% p.a.
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**x**	**XX% p.a.**

Table: Production of surfactants in Asia-Pacific from 2006 to 2022 – split by surfactant types

2.1.3.2 Products and applications - Germany

In 2014, the most important sales market for surfactants in Germany was the segment cleaners and detergents. Far behind followed the second largest market area industrial cleaners, even before paints and plastics. Within the next eight years, we expect demand for surfactants in the segment paints and plastics to develop the most dynamically by approx. X%. However, in the segment textiles and leather, a decline in demand of X% p.a. is to be expected.

in 1,000 tonnes	2006	2008	2010	2012	2014	2016p	2018p	2020p	2022p	2014-2022
Cleaners and detergents	X	X	X	X	X	X	X	X	X	XX% p.a.
Industrial cleaners	X	X	X	X	X	X	X	X	X	XX% p.a.
Body care and cosmetics	X	X	X	X	X	X	X	X	X	XX% p.a.
Textiles and leather	X	X	X	X	X	X	X	X	X	XX% p.a.
Paints and plastics	X	X	X	X	X	X	X	X	X	XX% p.a.
Others	X	X	X	X	X	X	X	X	X	XX% p.a.
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**XX% p.a.**

Table: Demand for surfactants in Germany between 2006 and 2022 - split by applications

The market for cleaners in Germany is very saturated. From year to year, consumers become more demanding with regard to quality, environmental protection as well as to saving time and money. This fact causes demand for high efficient and concentrated cleaners to increase. Also in the future we expect this trend to continue. The sale of additional products for cleaners will decrease in the future as they are more and more integrated in cleaners.

Due to a more and more hectic and rapid lifestyle of the Germans, consumers prefer dishwashing detergents that can be used fast and easily. These properties mainly count for dishwashing detergents for the dishwasher, which have different functions combined in one product. As most of the Germans already have dishwashers and products of the segment dishwashing detergents are already very mature, a slower growth is to be expected in this category. In the segment dishwashing detergent additives and hand dishwashing detergents, even a decline is to be expected.

People focus more on cleanliness and hygiene to protect themselves from infectious diseases. This causes a growth in the market for detergents. In the future, the fear of illnesses will decrease to a moderate level and other factors will be more significant with regard to the purchase of detergents. In particular advantages like saving time and money play an important role for the decision to purchase.

in 1,000 tonnes	2006	2008	2010	2012	2014	2016p	2018p	2020p	2022p	2014-2022
LAS	X	X	X	X	X	X	X	X	X	XX% p.a.
FAS/ FAES/ AES	X	X	X	X	X	X	X	X	X	XX% p.a.
Other anionic										
Anionic surfactants - Total										
Cationic surfactants - Total										
FAEO										
Other ethoxylates										
Other non-ionic										
Non-ionic - Total										
Others Surfactants - Total	X	X	X	X	X	X	X	X	X	XX% p.a.
Total	X	X	X	X	X	X	X	X	X	XX% p.a.

Chapter 2: Extensive market data on 31 countries:

- Total demand and revenue of surfactants
- Demand split by applications
- Demand for individual product types

Table: Demand for surfactants in Germany from 2006 to 2022 – split by surfactant types

3.5 South America

From a total demand of around X tonnes of surfactants in South America, nearly X tonnes accounted for the segment cleaners and detergents, which thus was, by far, the most important application area in this region. At a significant distance, this was followed by the application area body care and cosmetics which ranked second, even before industrial cleaners and paints and

Chapter 3: Demand per region and country split by the following applications:

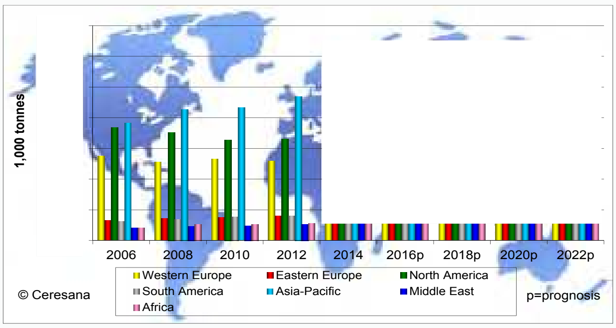
- Cleaners and detergents
- Industrial cleaners
- Body care and cosmetics
- Textiles and leather
- Paints and plastics
- Other applications

Graph: Demand for surfactants in South America from 2006 to 2022 – split by applications

We forecast the highest growth rate of X% p.a. in the next eight years for the application area paints and plastics. The weakest growth we forecast for the segment cleaners and detergents. The most important sales market for surfactants will still be cleaners and surfactants. We forecast demand for surfactants in South America to rise by approx. X% p.a. in the next eight years and market volume to amount to approx. X million tonnes.

4.1.1 Anionic surfactants - World

Out of the X million tonnes of anionic surfactants that were used worldwide in 2014, around X% were used in Asia-Pacific. Thus, this region enjoyed a considerable lead over North America and Western Europe. For Western Europe, we expect a slight decrease by annual rates of X% to around X million tonnes within the next eight years. Overall, we expect a demand of approx. X million tonnes for the global anionic surfactant market until the year 2022. Accordingly, demand will rise by X% p.a. between 2014 and 2022.



Graph: Global demand for anionic surfactants from 2006 to 2022 – split by regions

The hydrophilic groups of anionic surfactants are based on anions, e.g. negatively charged ions. Anionic surfactants offer excellent cleaning properties and high foaming. Because of their high washing performance, they are mainly used in detergents, dishwashing detergents and shampoo. They negatively charge the surface of textiles and those of dirt particles and thus, they repel each other and the washing power increases. As anionic surfactants react with positively charged ions like for example calcium or molecules of magnesium and the effect of cleaners can be reduced through the formation of calcium soaps, cleaners with anionic surfactants have to be higher dosed in

hard water or be supported by watersoftening substances (mainly by zeolites, layer silicates or complexing agents like triphosphate)

Alkylsulfates and alkyl ethoxylate sulfates are of particular importance. Soaps (sodium and calcium salts of aliphatic carboxylic acids), the oldest cleaners that are produced from fats and oils for millenia, are also anionic surfactants. Anionic surfactants, especially linear alkyl benzene sulfonates (LAS), secondary alkyl sulfonates (SAS), and fatty alcohol sulfates (FAS), account for the largest part of the entire consumption of surfactants. FAS based on renewable resources can replace petrochemical LAS.

4.1.1.1. Alkyl benzene sulfonates (LAS)

In 2014, around X million tonnes of alkyl benzene sulfonates (LAS) were used. The highest demand of X million tonnes and X tonnes came from the Asia-Pacific region and North America.

presumably dev

Chapter 4: Surfactants - Demand split by product types:

- Alkyl benzene sulfonates (LAS)
- Alkylsulfates / Alkyl ether sulfates / Alcohol ethoxy sulfates [FAS/ FAES/ AES]
- Other anionic surfactants
- Cationic surfactants
- Fatty alcohol ethoxylates [FAEO]
- Other ethoxylates
- Non-ionic surfactants
- Other surfactants

in 1,000 tonnes
Western Europe
Eastern Europe
North America
South America
Asia-Pacific
Middle East
Africa
Total

Table: Global demand for LAS from 2006 to 2022 – split by regions

PCC SE

Moerser Str. 149
47198 Duisburg
Germany
Tel.: 49 2066 2019 0
Web: www.pcc.eu

Financial Key Data				
(in million €)	**2010**	**2011**	**2012**	**2013**
Revenue	580	615	677	624
EBITDA	14.5	49.2	38.0	47.5

General information about the company

Divisions, Product Range The company consists of four main business segments:

- Chemistry: Polyols, surfactants, chlorine, specialty chemistry, consumer products

Production Sites

Profile Summary

Chapter 5: In-depth profiles for the world's largest manufacturers, including Ecover Belgium, Solvay, ALTANA, Bayer, Lanxess, PCC, ERCA, Campi y Jové, General Electric, Saraya, and KLK OLEO. (The profiles are assigned to the country in which the company is headquartered and include JVs and subsidiaries.)

specialty chemistry, 7% by consumer products, 1.9% by energy, 6.9% by logistics and 1% by holding. Split up regionally, 25.4% of the revenue in 2013 were generated in Germany, 37.1% in Poland, 22.8% in other EU countries, 7.2% in the rest of Europe and 7.5% in the USA, Asia and other regions. The segment surfactants comprises PCC Exol SA (Poland) with its subsidiaries such as PCC Chemax, Inc. (USA). PCC Exol SA is the only surfactants

manufacturer in Poland. In August 2012, PCC Exol SA, Poland, was listed on the Warsaw Stock Exchange. The company is ISO 9001, ISO 14001 and RSPO (Mass Balance Model) certified.

Specific information about Surfactants

PCC Exol SA and PCC Chemax, Inc. produce a wide range of non-ionic surfactants, anionic surfactants and amphoteric surfactants. The annual production capacity of PCC Exol SA amounts to 60,000 tonnes of non-ionic surfactants (ethoxylates) and 40,000 tonnes of anionic surfactants (sulfonates). The product portfolio includes:

PCC Exol SA:

Anionic surfactants:

- Dodecylbenzene sulfonic acid branded as "ABS Acid"
- Sodium dodecylbenzenesulfonate branded as "ABSNa"
- Sodium decyl/-lauryl sulfate branded as "Rosulfan"
- Sodium laureth sulfate branded as "Sulforokanol"
- Dioctyl sodium sulfosuccinate bra

Non-ionic surfactants

- Sodium laureth su
- PEG branded as "
- Biodegradable su
- Ethoxylated nony
- Mixtures of alcoh
- Mixtures of copol
- Sorbitan monostearate/ monooleate branded as "Rokwin" and "Rokwinol"

Chapter 5: Data and facts on major producers, clearly arranged by:

- Contact details
- Turnover and profit
- Production sites
- Profile summary
- Product details

Amphoteric surfactants:

- Cocamidopropyl betaine branded as "Rokamina"

PCC Chemax, Inc.:

- Various anionic, non-ionic, amphoteric and other surfactants branded as, e.g. "SURMAX", "CHEMAX" and "CHEMAL". PCC Chemax products have numerous uses and applications across a wide range of markets. The objective of the company is to sharpen its focus on the development of additives enhancing the performance of its customers' formulations. Product development at

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- ☐ Polyethylene - LDPE
- ☐ Polyethylene - LLDPE
- ☐ Polypropylene
- ☐ Polystyrene
- ☐ Polyurethanes & Isocyanates
- ☐ Polyvinyl Chloride
- ☐ Silicones
- ☐ Synthetic Rubber
- ☐ Thermoplastic Elastomers

Additives

- ☐ Antioxidants
- ☐ Biocides
- ☐ Fillers
- ☐ Flame Retardants
- ☐ Pigments
- ☐ Plasticizers
- ☐ Stabilizers

Chemicals

- ☐ Benzene
- ☐ Butadiene
- ☐ Butanol
- ☐ Carbon Black
- ☐ Catalysts
- ☐ Chelating Agents
- ☐ Ethylene
- ☐ Flavors
- ☐ Fragrances
- ☐ Hydrofluoric Acid & Fluorochemicals
- ☐ Propylene
- ☐ Solvents
- ☐ Styrene
- ☐ Surfactants
- ☐ Titanium Dioxide
- ☐ Toluene
- ☐ Xylene

Packaging

- ☐ Bags & Sacks - Europe
- ☐ Bags & Sacks - World
- ☐ Caps & Closures - Europe
- ☐ Corrugated & Solid Board & Carton
- ☐ Flexible Packaging - Europe
- ☐ Food Packaging - Europe
- ☐ Plastic Bottles - Europe
- ☐ Plastic Caps & Closures - Europe
- ☐ Plastic Caps & Closures - World
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- ☐ Rigid Metal Packaging - Europe

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- ☐ Fertilizers - World
- ☐ Urea - World

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- ☐ Ethylene - USA
- ☐ Propylene - China
- ☐ Propylene - USA

***Individual Country Profiles for the Market Study: Plastics - Europe**

☐ Belgium	☐ France	☐ Germany	☐ Italy	☐ Poland
☐ Russia	☐ Spain	☐ The Netherlands	☐ Turkey	☐ United Kingdom

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