Abstract

The world market of surfactants reached US$24.33 billion in 2009, nearly 2% up from the previous year. The steady growth achieved during 2005-2008 was hit by the global economic recession triggered by the financial crisis. The impact of this crisis reduced chemical industry growth globally. On the other hand, the current relatively low crude oil price could be a potential benefit to surfactant producers, as the drop in feedstock prices will lead to increase in the relative profit margin.

As the global economy seems to show strong recovery, the surfactant market value is expected to grow by 2.8% this year through 2012. The market will experience quite healthy growth in next two years in the forecast and the growth by 3.5-4% can be expected thereafter.

Acmite Market Intelligence has finished the latest update of its comprehensive report on world surfactant market. It is ready for order.

The report examines the current products and application areas, provides extensive market data of 2009, and market forecast through 2015 to 2018. It also outlines the competition landscape, evaluates market chances and risks and anticipates future trends based on a series of influence factors.

• Ca. 230 pages analyzing the market
• Ca. 70 figure tables
• Ca. 350 leading manufacturers profiled

With a multi-dimensional and in-depth view of world surfactant market, this report is ideal help for you with decisions about international market penetration, business expansion or project feasibility analysis.
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Volume II

Company profiles (ca. 350) ............................................................. 1-400
Sample reading … …

The US economy was reported to have achieved 3% growth in the first half year of 2010, showing strong economic rebound. Since the collapse of its housing market, the US experienced severe financial crisis in the last two years. Although facing tough competitions from emerging countries regarding the manufacturing sector, the United States is still the most robust and innovative economy in the world. The average GDP growth indicates that the US still outperforms its rival, EU and the US possesses the good ability to recover from crisis as history shows. The real economy in the US is believed to remain quite healthy, even the automobile industry sees significant rise in sales. However there are still many suspects as the still sluggish housing market and high unemployment rate are the biggest obstacles to the economy's recovery.

Japan with GDP growth rate at 1.7% in 2006 and 1.9% in 2007, and again 2.7% in 2010 shown the signs of strong rebound after it suffered the longest economic recession from late 1990s to 2003. Capital investment in Japan has increased noticeably. Japan’s economy is highly dependent on export markets, with the US its largest buyer. The economic crisis starting from the US substantially affects the investment confidence and financial market in Japan. The Japan’s economy will see certain slow down before it rebound again.

The growth prospect of the Euro-zone is still under the shadow of the debt crisis. The uncertainty about the sustainability of fiscal positions in several high-income European countries (Greece, Spain, Portugal, Italy and Ireland) could entail serious consequences on global economy, particularly in Western Europe. So far the debt crisis has not have much adverse impact on the real economy of the Euro-zone. Germany and France registered health growth in the first half year of 2010. Germany companies are even in a “Party mood”, driven by strong demand from developing countries, particularly China, as well as from the US. Its automobile industry sees much better than expected … …

(Vol. I, page 23)
Market size and forecast

In value

The world market of surfactants reached US$24.33 billion in 2009, nearly 2% up from the previous year. The steady growth achieved during 2005-2008 was hit by the global economic recession triggered by the financial crisis. The impact of this crisis reduced chemical industry growth globally. On the other hand, the current relatively low crude oil price could be a potential benefit to surfactant producers, as the drop in feedstock prices will lead to increase in the relative profit margin.

As the global economy seems to show strong recovery, the surfactant market value is expected to grow by 2.8% this year through 2012. The market will experience quite healthy growth in next two years in the forecast and the growth by 3.5-4% can be expected thereafter.

Among four segments, anionic and non-ionic surfactants are the dominating ones, accounting for two thirds of the total surfactant market in value.

Accounting for 36% of the total surfactants in use, nonionics have replaced the anionics to become the largest surfactant type. Valued at US$8.64 in 2009, the non-ionic surfactant market is expected to grow at 2.4% annually to reach US$9.27 by 2012. It will grow by 3-3.5% annually thereafter to reach US$10.25 billion by 2015 and increase to US$11.33 billion by 2018.

Anionics was the largest surfactant type ten years ago, but is continuously losing its market share due to some environmental concerns, typically biodegradability of some types of anionic surfactants. The anionic surfactant market was estimated at around US$7.27 billion in 2009, making up roughly 30% of the total … …

(Vol. I, P. 38)
- trisiloxanes, which is called superwetter, shows an unusual behavior on hydrophobic surface. It promotes rapid spreading of dilute aqueous solutions.
- good foaming and defoaming ability. It is the basis for their use in polyurethane foam manufacture and as foam stabilizer in other applications
- very good lubricity
- ability to impart certain feel to skin and hair

**Main applications of silicone surfactants:**

Silicone surfactants were firstly introduced to the market for the use in polyurethane foam manufacture in the 1950s. They were soon afterwards applied in other fields, especially in industrial uses. As silicone surfactants are very complicate to manufacture, they are normally used in the fields where other surfactants are not effective. Their uses are based on their unique properties.

The main application fields of silicone surfactants include:

- manufacture of polyurethane foam, which is the most important commercial used of silicone surfactants
- demulsifiers in gas and oil production
- mulsifiers based on high molecular weights
- defoamers used in hydrocarbon fuels. Silicone surfactant additives are effective in suppressing the foaming tendency of diesel fuels, the choice of silicon and co-solvent depending on the characteristics of the fuel to be treated. The use of defoamers in fuels also reduces the risk of spills polluting the ground, the atmosphere and the consumer
- personal care and cosmetics. Oil soluble silicone surfactants are used to improve the spreading ability of organic oil and waxes in cosmetics and skin care products. Hydrophilic silicone surfactants

... ... (Vol. I, P. 139)
### 6.3.2 Personal care market

#### 6.3.2.1 Personal care market by segment

**Personal care market by segment in US$ Bn**

<table>
<thead>
<tr>
<th>Segment</th>
<th>2009</th>
<th>2010</th>
<th>2012</th>
<th>2015</th>
<th>2018</th>
<th>AAGR</th>
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<tr>
<td><strong>Body / hand wash</strong></td>
<td>22.89</td>
<td>23.82</td>
<td>25.78</td>
<td>29.82</td>
<td>34.48</td>
<td>5.0%</td>
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<tr>
<td><strong>Shampoo / Hair care</strong></td>
<td>34.66</td>
<td>36.00</td>
<td>38.82</td>
<td>44.65</td>
<td>51.32</td>
<td>4.8%</td>
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<tr>
<td><strong>Skincare</strong></td>
<td>40.44</td>
<td>42.68</td>
<td>47.55</td>
<td>57.88</td>
<td>70.41</td>
<td>6.8%</td>
</tr>
<tr>
<td><strong>Cosmetics</strong></td>
<td>31.53</td>
<td>32.96</td>
<td>36.03</td>
<td>42.88</td>
<td>51.00</td>
<td>6.0%</td>
</tr>
<tr>
<td><strong>Others</strong></td>
<td>26.07</td>
<td>27.13</td>
<td>29.37</td>
<td>34.45</td>
<td>40.40</td>
<td>5.5%</td>
</tr>
</tbody>
</table>
| **Total**            | 155.59| 162.59| 177.55| 209.68| 247.62| 5.70%

---

**Personal care market by sector in value 2009**

- **Body/hand wash**: 15%
- **Shampoo / Hair care**: 22%
- **Skincare**: 26%
- **Cosmetics**: 20%
- **Others**: 17%

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**Personal care market by sector in US$ Bn**

![Graph showing personal care market by sector](image)

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... ...  

(Vol.I, P. 197)
Nippon Shokubai Co., Ltd. (Japan)

Kogin Bldg., 4-1-1 Koraibashi, Chuo-ku,
Osaka 541-0043
Japan
Phone: +81-6-6223-9111
Fax: +81-6-6201-3716
http://www.shokubai.co.jp

Number of employees: 3,430
Year of foundation: 1941
Revenue of 2009: JPY 244,317 Million

Company profiles

Nippon Shokubai Co., Ltd., through its subsidiaries, engages in the manufacture and sale of basic chemicals, functional chemicals, and environmental systems and catalysts primarily in Japan, Europe, and Asia.

Nippon Shokubai operates in the following segments:

- Basic Chemicals: acrylic acid, acrylates, ethylene oxide, ethanol amine, and higher alcohol surfactants.
- Environment & Catalysts: catalysts for cleaning automobile exhaust gases, process catalysts, De-NOx catalysts, and dioxin decomposition/elimination equipment.

The company produces its higher-alcohol surfactants under the brand name of SOFTANOL, which include the following product series:

- M-series: Nonionic surfactants, Emulsifier, Defoaming agent, Spreader, ...

(Vol.II, P. 260)
# Order Form

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If you have any question please email to: market@acmite.com

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<td>Hardcopy+CD</td>
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<td>☐ EUR 1390</td>
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<td>☐ EUR 690</td>
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<td>World Surfactant Market, Total(Volume I + II)</td>
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<td>☐ EUR 1790</td>
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<tr>
<td>Sum</td>
<td></td>
<td></td>
<td>☐ EUR</td>
<td>☐ EUR</td>
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Company: ____________________________  Contact Person:  Mr ☐  Ms ☐  Dr ☐

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