

Nonylphenol Ethoxylate - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Nonylphenol Ethoxylate Market size is estimated at 416.64 kilotons in 2024, and is expected to reach 432.94 kilotons by 2029, growing at a CAGR of 0.77% during the forecast period (2024-2029).

Due to the COVID-19 outbreak, nationwide lockdowns worldwide, disruption in manufacturing activities and supply chains, and production halts negatively impacted the market in 2020. However, the conditions started recovering in 2021, restoring the market's growth trajectory.

Key Highlights

- Growing demand for industrial cleaning agents and increasing demand from other end-user applications are expected to drive the market over the forecast period.
- Conversely, stringent environmental conditions are expected to hinder market growth.
- Growing demand for personal care products is expected to offer lucrative opportunities to the market studied.
- Asia-Pacific dominates the global market, with the largest consumption from countries such as China and India.

Nonylphenol Ethoxylate Market Trends

Growing Demand for the Industrial Cleaning Agents

- Nonylphenol ethoxylate is a low-foaming non-ionic detergent with excellent properties such as wetting, dispersants, solubilizers,

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and emulsifiers.

- European Union has banned the use of nonylphenol ethoxylates in the laundry as they break down into the environment into nonylphenols which are toxic to aquatic and human life. The United States Environmental Protection Agency has set guidelines and allows certain concentration limits for nonylphenol ethoxylates in their products. These decisions might hinder the growth of nonylphenol ethoxylates during the forecast period.
- In Asia-Pacific, China and India are the largest consumers of surfactants, and these countries are likely to continue their dominance during the forecast period. In China, the production of synthetic detergents is mainly concentrated in Guangdong, Zhejiang, and Sichuan, with an annual production capacity of 3.25 million tons, 1.15 million tons, and 1.09 million tons, respectively, in 2022. However, strict environmental policy in the country has been restricting the synthetic detergents market in the country.
- According to data from the German Cosmetic, Toiletry, Perfumery and Detergent Association (IKW), revenues from laundry detergents and cleaning products had grown to EUR 5.10 billion (USD 5.58 billion), compared to EUR 5.09 billion (USD 5.56 billion) in 2021. Revenue from laundry detergents and cleaning products in Germany has been increasing gradually yearly. However, the revenue from soaps and synthetic detergents incurred a loss in 2022 as the revenue fell from EUR 502 million (USD 549.20 million) in 2021 to EUR 462 million (USD 505.44 million) in 2022.
- In the United Kingdom, the country's soap and detergent manufacturing market is dynamic. The industry is known for strong product innovation, as the manufacturers compete to retain consumer interest. According to the Office for National Statistics, in the United Kingdom, the revenue generated through manufacturing soap and detergents and cleaning and polishing preparations is likely to reach about USD 6.13 billion by 2023.
- Owing to all these factors, the market for nonylphenol ethoxylate will likely grow worldwide during the forecast period.

Asia-Pacific Region to Dominate the Market

- The Asia-Pacific region is expected to dominate the market for nonylphenol ethoxylate during the forecast period due to increased demand from countries like China and India.
- Nonylphenol ethoxylate offers excellent wetting, low-foaming, and superior cleaning properties and is suitable for all industrial and institutional cleaning activities.
- The output from the Chinese chemical industry is essential in various products, which include soaps, detergents, cosmetics, etc. The presence of over 60 washing, care, and cleaning agent manufacturers underscores this sector's competitive nature. Furthermore, with approximately 98.7 washing machines per one hundred households in China, there is a growing consumer base for cleaning products. The rise of Chinese household appliance producers and their focus on affordable products have increased access to washing machines, resulting in a higher demand for detergents.
- Moreover, India is one of the largest producers of soaps in the world. The per capita consumption of toilet/bathing soaps in the country is around 800 grams. The per capita consumption of toilet/bathing soaps, averaging around 800 grams, further indicates the country's steady demand for soap products. Additionally, the household and personal care segment accounts for around 50% share of the FMCG market in India. The consistent increase in the production of synthetic detergent intermediates to over 780 thousand metric tons in FY 2022 indicates the rising demand for detergent products. Consequently, the demand for nonphenyl ethoxylate as raw materials in surfactant production experiences growth alongside the expansion of the detergent market in India.
- Furthermore, China accounts for approximately 7% of the overall agricultural acreage globally, thus feeding 22% of the world's population. The country is the largest producer of various crops, including rice, cotton, potatoes, and others. Hence, agrochemical demand is rapidly increasing due to the country's large-scale agricultural activities.
- India is the fourth largest agrochemical producer in the world and is recognized as an ideal base for export-oriented agrochemical production, as per the Federation of Indian Chambers of Commerce and Industry (FICCI) report on the fertilizers sector. The report further highlights that India is one of the most important agrochemical exporters in the world, exporting to four

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major countries: the United States, Japan, China, and Brazil.

- The output value of China's textile and garment industry reached a new export peak in 2022, with a trade surplus of over USD 300 billion. According to data from the General Administration of Customs of China, the total value of China's textile and apparel exports in 2022 increased by 2.5% year-on-year. With exports exceeding USD 300 billion for the third consecutive year in 2022, China remains the world's largest exporter of textiles and apparel.
- According to the Ministry of Textiles, India's textile and apparel exports (including handicrafts) stood at USD 44.4 billion in FY22, a 41% increase YoY. India has a 4% share of the global trade in textiles and apparel.
- The factors mentioned above, coupled with government support, contribute to the increasing demand for the nonylphenol ethoxylate market in the Asia-Pacific during the forecast period.

Nonylphenol Ethoxylate Industry Overview

The global nonylphenol ethoxylate market is partially consolidated, with players accounting for a major share of the market. A few companies include Dow, Solvay, India Glycols Limited, Stepan Company, and Oxiteno.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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