

India Industrial and Institutional Cleaning Chemicals Market By Product Type (General Purpose Cleaners, Sanitary Care Cleaners, Others), By End User (Industrial, Institutional), By Region, Competition, Forecast and Opportunities, 2020-2030F

Market Report | 2024-12-13 | 85 pages | TechSci Research

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Report description:

India Industrial and Institutional Cleaning Chemicals Market was reached USD 2.04 billion by 2024 and is anticipated to project steady growth in the forecast period with a CAGR of 4.56% through 2030. The surge in the industrial and institutional cleaning chemicals market in India can be attributed to several key factors. Primarily, the exponential growth of the healthcare industry stands out as a significant driver. The heightened emphasis on stringent cleanliness standards, particularly amplified by the ongoing COVID-19 pandemic, has spurred an unprecedented demand for high-quality cleaning chemicals.

Another crucial factor propelling market growth is India's demographic advantage. With a considerable portion of the population below the age of 30, the country benefits from a vibrant and dynamic workforce. This demographic trend has led to increased disposable income and a notable uptick in healthcare spending. Consequently, the rapid expansion of the healthcare sector presents a highly promising and lucrative opportunity for the industrial and institutional cleaning chemicals market in India. The heightened awareness of health and sanitation, combined with the robust growth in the healthcare industry, are driving forces behind the expansion of India's industrial and institutional cleaning chemicals market. With sustained growth expected, industry stakeholders have a prime opportunity to capitalize on this upward trajectory by delivering innovative and effective cleaning solutions tailored to meet the evolving demands of the healthcare sector and the escalating need for stringent cleanliness standards.

Key Market Drivers

Growth in Healthcare Industry

The healthcare industry, which operates under the highest hygiene standards, relies extensively on specialized cleaning chemicals to ensure safe and sanitized environments. This reliance has become even more critical in light of the COVID-19 pandemic, where maintaining impeccable sanitation is essential not only for patient safety but also for preventing the spread of infection. In India, this demand for cleanliness and hygiene within healthcare settings has escalated as the nation continues to battle public health

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challenges. Industry experts project a notable rise in government healthcare spending in India over the coming years, driven in part by lessons learned from the pandemic. Public healthcare expenditure in India accounted for 2% of GDP in 2022, up from 1.2% in 2020. The Indian government has outlined plans to increase this to 2.5% by 2025, with a particular focus on underprivileged populations. As government spending on healthcare continues to grow, a parallel expansion in the medical equipment sector is expected, presenting significant opportunities for growth in this market. India's healthcare sector is experiencing a rapid and unprecedented expansion driven by several key factors, including rapid urbanization, increasing government investments in healthcare infrastructure, and the growing purchasing power of the middle class. The government's commitment to expanding access to healthcare, combined with the rising demand for quality healthcare services, has significantly heightened the need for industrial and institutional cleaning chemicals.

As healthcare facilities evolve to meet the demands of a growing population and more complex healthcare needs, the requirement for high-quality, effective cleaning solutions has surged. These products are now considered indispensable in hospitals, clinics, and healthcare facilities, not just for infection control, but also for maintaining operational efficiency and patient confidence. The expansion of India's healthcare infrastructure, alongside growing public awareness of health and hygiene standards, has amplified the demand for cleaning chemicals in both urban and rural healthcare environments.

The increasing adoption of stringent hygiene regulations and guidelines across the healthcare industry, in conjunction with expanding healthcare facilities, ensures a sustained and growing demand for industrial and institutional cleaning chemicals. This growing demand is also reflective of the evolving nature of healthcare services, with the private sector, medical tourism, and specialized care centers requiring specialized cleaning solutions to maintain their premium service offerings. As the Indian healthcare sector continues to prioritize public health and hygiene standards, the market for industrial and institutional cleaning chemicals is expected to see significant, sustained growth. The trajectory of this market is not only promising but also positioned to be a critical component in shaping the future of healthcare services in India.

Surge in Technological Advancements

India's Industrial and Institutional Cleaning Chemicals Market is experiencing significant growth, driven by a confluence of technological advancements, evolving consumer demands, and favorable economic conditions. The incorporation of cutting-edge technologies has played a pivotal role in transforming the industry landscape, fostering substantial progress and innovation across the sector. Technological advancements have led to the development of more effective and efficient cleaning solutions tailored to meet the increasingly sophisticated needs of both industrial and institutional users. These innovations have not only improved the cleaning performance of products but have also significantly enhanced user convenience, thus acting as a critical growth driver for the market. For instance, the creation of highly concentrated formulas and products that require less water or generate less waste has optimized operational efficiency, positioning these products as highly desirable in an eco-conscious market.

The growing emphasis on sustainability and environmental responsibility is reshaping the demand for cleaning solutions. As consumers become more aware of the environmental impact of traditional chemical-based cleaners, there has been a marked shift towards bio-based alternatives. Advancements in technology have enabled the development of bio-based cleaning products that not only match the cleaning efficiency of synthetic chemicals but also present fewer ecological risks. This shift toward eco-friendly, sustainable products is gaining significant traction and is expected to further accelerate the expansion of India's cleaning chemicals market. As demand for such solutions intensifies, the industry is positioned to benefit from ongoing technological developments that provide cleaner, greener alternatives without compromising on performance. The rapid pace of technological innovation continues to drive the evolution of the industrial and institutional cleaning chemicals market in India. As the sector moves forward, it is expected that further advancements will not only improve product functionality but also enhance the overall user experience. These improvements include more effective cleaning methods, reduced environmental footprints, and better cost efficiencies, all of which align with the evolving demands of consumers and the broader market. As a result, the continued integration of advanced technologies in the cleaning chemicals market is poised to drive sustained market growth and establish a more sustainable, user-centric product landscape.

The rapid adoption of technological advancements and the increasing consumer preference for environmentally conscious solutions underscore the dynamic growth trajectory of India's industrial and institutional cleaning chemicals market. With ongoing innovation fueling both efficiency and sustainability, the sector is well-positioned to expand in the coming years, meeting the evolving needs of both the industrial and institutional sectors in India.

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Key Market Challenges

Volatility in Cost of Raw Materials

The industrial and institutional cleaning chemicals market relies heavily on various raw materials, including surfactants, solvents, phosphates, and biocides, to formulate effective cleaning products. However, the prices of these raw materials are subject to fluctuations due to factors such as changes in commodity prices, geopolitical tensions, trade policies, and disruptions in the supply chain. This volatility presents a significant challenge for manufacturers in the industry.

When the prices of essential raw materials rise, manufacturers often struggle to absorb the increased costs. Consequently, they may need to pass on these cost hikes to consumers, resulting in higher prices for the final cleaning products. This can impact the competitiveness of manufacturers and potentially affect consumer demand. Fluctuating raw material costs make financial planning more challenging for companies in the industry. The uncertainty surrounding these costs hampers their ability to plan for growth and expansion effectively, as they must continually adapt to changing market conditions. The volatility in raw material costs also affects the specialty chemicals market, which overlaps significantly with the cleaning chemicals sector. This interconnectedness adds complexity to managing raw material costs.

The ongoing COVID-19 pandemic has further compounded these challenges by causing disruptions in the global supply chain, leading to shortages and increased prices for raw materials. This additional layer of complexity has heightened volatility and uncertainty in the market. While the industrial and institutional cleaning chemicals market in India continues to grow, the volatility in raw material costs presents a significant challenge for manufacturers. To maintain their market position and ensure sustainable growth, manufacturers must develop comprehensive strategies to mitigate the impact of these cost fluctuations. This includes exploring alternative sourcing options, adopting efficient supply chain management practices, and investing in research and development for innovative and cost-effective raw material substitutes. By proactively addressing these challenges, manufacturers can navigate the evolving industry landscape and secure a prosperous future.

Key Market Trends

Rise in Environmental Concerns

India's rapidly expanding economy has spurred a heightened demand for industrial and institutional cleaning chemicals. As the nation progresses, there's an increasing emphasis on effective and sustainable cleaning solutions.

The market trends are notably influenced by heightened public awareness and measures aimed at curbing environmentally harmful practices. Consumers are increasingly mindful of the environmental and health impacts associated with traditional cleaning chemicals. This shift in consumer preferences is driving a surge in demand for eco-friendly cleaning products. In response, companies are directing their efforts towards the development of green cleaning products that prioritize sustainability. These products utilize biodegradable components and eschew harsh chemical ingredients, offering both effective cleaning performance and reduced environmental impact. The market is witnessing a notable uptick in the adoption of bio-based alternatives, reflecting this trend towards eco-friendliness.

Regulatory directives from environmental agencies and governmental bodies are compelling companies to align their practices and product offerings with stringent standards. This regulatory pressure is further propelling the adoption of environmentally friendly cleaning chemicals. Companies are actively investing in research and development initiatives to formulate innovative solutions that not only comply with regulations but also deliver superior cleaning performance. The escalating environmental concerns represent a pivotal trend shaping India's industrial and institutional cleaning chemicals market. As sustainability awareness continues to gain momentum, this trend is expected to intensify. This trajectory will drive the development of increasingly innovative and comprehensive eco-friendly cleaning solutions, catering to the evolving needs of businesses and individuals across India.

Segmental Insights

Product Type Insights

Based on the category of product type, the general purpose cleaners segment emerged as the dominant player in the Indian market for Industrial and Institutional Cleaning Chemicals in 2024. One of the primary reasons behind the market dominance of general-purpose cleaners is their exceptional efficiency. These versatile cleaning solutions are renowned for their remarkable effectiveness in tackling a wide range of cleaning tasks, making them a go-to-choice for both institutional and industrial users. By offering a comprehensive one-stop cleaning solution, they eliminate the need for multiple specialized products, providing

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convenience and ease of use.

The cost-effectiveness of general-purpose cleaners is another driving factor for their widespread adoption. Their versatility allows them to provide superior value for money compared to specialized cleaning products. This is particularly crucial in the industrial and institutional sectors where large volumes of cleaning agents are required. The substantial cost savings achieved by using general-purpose cleaners can significantly impact the bottom line, making them an attractive option for businesses seeking to optimize their cleaning operations.

Regional Insights

West India emerged as the dominant region in the India Industrial and Institutional Cleaning Chemicals Market in 2024, holding the largest market share in terms of value. West India, particularly states like Maharashtra and Gujarat, are renowned for their robust industrial base. These states house a multitude of industries, including manufacturing, pharmaceuticals, and hospitality, all of which require substantial quantities of cleaning chemicals for their operations. The prevalence of such extensive industrial activity serves as a primary catalyst for West India's dominant position in the market.

Moreover, the impressive infrastructure development in the region further contributes to this upward trend. The well-established and advanced infrastructure enables seamless transportation and distribution of cleaning chemicals, positioning West India as a strategic hub for manufacturers and distributors alike. Additionally, the presence of major ports for international trade further bolsters the market growth in this region, amplifying its significance in the industry.

Key Market Players

□□Diversey India Pvt. Ltd.

□□Schevaran Laboratories Pvt. Ltd.

□□Buzil Rossari Pvt. Ltd.

□□Haylide Chemicals Pvt. Ltd.

□□BASF India Ltd.

□□Croda India Company Pvt. Ltd.

Report Scope:

In this report, the India Industrial and Institutional Cleaning Chemicals Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□□India Industrial and Institutional Cleaning Chemicals Market, By Product Type:

- o General Purpose Cleaners
- o Sanitary Care Cleaners
- o Others

□□India Industrial and Institutional Cleaning Chemicals Market, By End User:

- o Industrial
- o Institutional

□□India Industrial and Institutional Cleaning Chemicals Market, By Region:

- o North India
- o East India
- o West India
- o South India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Industrial and Institutional Cleaning Chemicals Market.

Available Customizations:

India Industrial and Institutional Cleaning Chemicals Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

□□Detailed analysis and profiling of additional market players (up to five).

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