

According to the USDOC, nearly seven billion pounds of laundry detergents were used in the United States in 1988, primarily by households. While the detergent market is dominated by three producers, the USDOC notes that smaller companies have increased their market shares. Sales of detergent products are dominated largely by heavy-duty liquid laundry detergents which currently account for 40% of sales. The annual consumption of automatic dishwasher detergents is increasing at 3% per year. Despite these opportunities, detergent manufacturers in these sectors are confronted with a formidable list of environmental regulations. It is estimated that 20 percent of state bills concerning environmental protection each year affect manufacturers of soaps and detergents. The industry is cooperating with environmental groups and regulatory agencies to reduce the amount of legislation from 2,000-3,000 bills.

Estimated annual retail sales of the bar soap business exceed \$9 billion (U.S.) and are dominated by five companies. The USDOC notes that strong sales growth is expected in toilet soaps with high glycerine content. The market for liquid toilet soap remains at 8-10% of the toilet soap market. According to the USDOC, one approach to increasing sales is to include antibacterial ingredients in the product in order to have the product serve multiple purposes.

The USDOC forecasts that real growth in the soap and detergent industry should average 3% annually between 1989 and 1995. The USDOC expects that sales of heavy-duty laundry detergents are expected to exceed the sales of powdered detergents by 1993. Heavy-duty laundry detergents are composed of several ingredients: surface active agents (to remove dirt); builders (to soften the wash water); foam regulators; solubilizers (to maintain solubility of ingredients in liquid detergents); antiredispersion agents (to keep dirt from re-entering fabric), whiteners and brighteners, corrosion inhibitors (to protect automatic washers); and enzymes (for stain removal). The USDOC expects optical brighteners and fluorescent whitening agents to continue to increase in sales, possibly in conjunction with multifunctional powders and liquids.

Polishes and Sanitation Goods

Polishes and sanitation goods include household bleaches, specialty cleaners, disinfectants, and polishing preparations. Institutional and industrial products in this industry include sanitizers, defoamers, biocides, disinfectants, deodorants, degreasers, polishers and all-purpose cleaners. The USDOC notes that the wholesale value of this market is estimated at \$4.7 billion (U.S.) of which janitorial products constitute 40% and food processing and service 50%. According to the