

Latest Henkel survey

World soap, detergent growth rate slows

Between 1978 and 1980, the world production of soaps, detergents and cleaning compounds rose by approximately 4.1% per year, reaching almost 28 million tons, according to a report from the department of political economics at Henkel KGaA in Düsseldorf. The growth rate was significantly lower than in every other two-year period since 1970, but still higher than had been predicted by previous Henkel studies.

The growth rate in Western Europe reflected the world average. Production was about 6.7 million metric tons (MMT) in 1978, 7.1 MMT in 1979 and 7.4 MMT in 1980 (Table 1). Eastern Europe did not sustain its growth rate of earlier years. Production was about 3.0 MMT in 1978 and 1979, rising to 3.2 MMT in 1980. Latin American production increased at an annual rate of 5.2%, from 2.5 MMT in 1978 to 2.7 MMT in 1980. Asian production rose from 4.9 MMT in 1978 to 5.2 MMT in 1980. The United States, one of the world's largest users of cleaning materials, rose from 7.2 MMT in 1979 to 7.4 MMT in 1980, a relatively low growth rate but a large total volume.

In 1981, total world production of soaps, detergents and cleaning compounds reached 29.1 MMT and, in 1982, that figure rose by 3.3% to 30.1 MMT. The two-year period 1980 to 1982 thus shows an average annual growth rate of 3.7% which, the Henkel report says, is "a clear indication of a lower growth rate." In 1982, the USA produced 7.7 MMT, up from 7.4 MMT in 1980, and Canadian production increased to 304,000 metric tons in 1982, from 263,000 metric tons in 1980. The Western European total for 1982 was 7.9 MMT from 7.4 MMT in 1980, and Eastern Europe reached a total of 3.4 MMT in 1982, from 3.2 MMT in 1980. Mexico produced a total of 809,900 MT in 1980 and 944,700 MT in 1982. India increased its production only slightly from 1.08 MMT in 1980 to 1.10 MMT in 1982, and Japan's total for 1982 was 1.1 MMT, up from 972,400 MT in 1980.

Within the product groups, soaps achieved a worldwide average production increase of 4% annually from 1978 to

1980. Henkel figures show a decline for soaps only between 1972 and 1974. Between 1980 and 1982, world soap production increased from 7.9 MMT to 8.4 MMT. Production of soap powders dropped to 299,500 metric tons from 338,100 metric tons. Synthetic detergent production was 16.5 MMT in 1980 and 17.9 MMT in 1982. Of this, liquid detergents accounted for 4.6 MMT in 1980 and 5.3 MMT in 1982, and powders for 9.4 MMT in 1980 and 10.5 MMT in 1982.

In North America, the high level of consumption continued (Table 2). At 30 kg (1980 figures), North American per capita consumption is more than 10 kg above that of Western Europe, which at 18.9 kg per capita consumption in 1980 was almost three times the world per capita consumption (6.3 kg). In Eastern Europe, consumption rose again to 8.6 kg per capita, after stagnating in previous years. Latin American consumption is now above the world average at 7.8 kg, although consumption in Africa (3.2 kg per capita) and Asia (2.1 kg per capita) is significantly below this level.

TABLE 2

World Per-Capita Consumption by Continents (kg)

Continent	1960	1970	1980
West Europe	9.7	13.8	18.9
East Europe	6.5	6.5	8.6
North America	12.8	20.2	30.1
Central America	4.1	6.9	7.8
South America	4.6	4.7	
Oceania	13.1	15.4	16.1
Africa	2.3	2.3	3.2
Asia	1.0	1.2	2.1 ^a
World	3.8	4.6	6.3 ^b

^aExcluding China: 2.5 kg.

^bExcluding China: 7.7 kg.

TABLE 1

World Production and Consumption of Soaps, Detergents and Cleaning Compounds in 1970, 1974, 1978 and 1980

Continent	1970		1974		1978		1980	
	Production 1,000 t	Consumption 1,000 t	Production 1,000 t	Consumption 1,000 t	Production 1,000 t	Consumption 1,000 t	Production 1,000 t	Consumption 1,000 t
West Europe ^a	4,905	4,767	6,144.6	5,993.1	6,731.7	6,561.5	7,401.8	7,050.3
East Europe	2,190	2,253	2,277.4	2,283.4	2,999.4	3,018.6	3,186.7	3,268.1
North America	4,598	4,574	6,253.0	6,118.4	7,354.2	7,268.4	7,706.3	7,563.9
Central America	607	617	740.4	751.5				
South America	868	887	1,268.4	1,239.5	2,466.0	2,519.4	2,757.2	
Oceania	228	237	308.5	275.5	276.8	285.8	296.0	300.2
Africa	724	780	856.8	876.9	1,181.7	1,308.0	1,463.3	1,493.9
Asia	2,257	2,324	2,636.5	2,670.1	4,936.4	4,877.0	5,211.6	5,240.6
World	16,377	16,439	20,455.6	20,208.4	25,846.1	25,838.7	27,994.0	27,674.2

^aIncluding Yugoslavia

Henkel forecasts that Western European consumption will increase 2% annually over the next few years, with growth likely to be stronger in countries with lower per capita consumption. Per capita consumption in the United States, the report predicts, also will rise about 2%. Increases in consumption in Eastern Europe will depend largely on the economic and political situation. In Latin America, a slow growth rate is possible, Henkel said. The birth rate in Asia—especially China—is expected to decline considerably by 1990, so that an increase in per capita consumption may be expected. This is not expected to happen in Africa.

Henkel stressed that the world growth rate curve has flattened and predicted an average annual increase in per capita consumption of approximately 1.6% through 1990 in comparison to the 2.6% increase from 1960 to 1980 and 3.2% from 1970 to 1980. Henkel expects an annual average production increase of approximately 3% until 1990.

The Henkel report emphasizes that “at least for the continents it can be said that production and consumption are largely identical.” A comparison between production and consumption of soaps and detergents in 1974, 1978 and 1980 shows that, for these commodities, foreign trade is of secondary importance.

European fatty acids up 9%

The increased demand for fatty acids in Europe, forecast by the European Association of Fatty Acid Producing companies (APAG) last year, has been modest, according to the association's new president, E. Snoeck (Akzo Chemie BV).

APAG statistics show growth in total production of fatty acids, from 1982 to 1983, of just over 9% to 670,000 tons, although this was only 3% more than the average annual production in the years before 1982.

Snoeck told an audience at the APAG General Assembly in May that this slow growth was due to the current high costs of raw materials and problems caused by excess capacities in Europe and elsewhere. However, he predicted that the European fatty acids industry would continue to improve because of the naturally renewable raw materials available from multiple sources and the biodegradable, nontoxic products used for a wide range of applications.

New Henkel unit

Henkel Corporation, U.S. subsidiary of Henkel KGaA, Dusseldorf, has announced the formation of a Chemical Raw Materials Department to handle sales of its line of oleochemicals in the U.S.A.

The new department will handle fractionated fatty acids (C₆ to C₂₂ chain lengths), methyl esters of palm kernel oil and castor oil derivatives. The methyl esters are produced in Henkel's new plant in Malaysia, which, the company says, is the most advanced downstream oleochemical processing plant in Malaysia. Dr. Heiner Guertler, Henkel's executive vice president, Chemical Products Division, recently announced, “We believe palm kernel oil to be an important raw material source versus coconut oil on a cost and assured-supply basis.”

IFSCC program announced

The technical program is now available for the 13th Congress of the International Federation of Societies of Cosmetic Chemists, to be held in Buenos Aires, October 16-19, 1984. Contact: Interburo S.A., Paraguay 674 - 4° Piso, 1057 Buenos Aires, Argentina. The technical program includes papers given by AOCS members Dr. E. D. Goddard, of Union Carbide, USA, on “Electrical Properties of Skin and Hair,” and Dr. F. Domingo, Tensia Surfac, Spain, whose talk is entitled “Influencia de los Tensioactivos no Ionicos Altamente Etoxilados en las Propiedades de los Lauril Eter Sulfatos.”

Stepan promotions

Stepan Company has announced the promotions of Kenneth B. Johnson to business manager for general detergents, Thomas G. Baker to business manager for emulsion polymerization, and Ralph N. Davies to business manager for distributors. Donald C. Rehms Jr. is now plant manager for Stepan's Anaheim, California, facility, and T. M. Walsh has succeeded Rehms as production superintendent at the plant.

Available from AOCS – Handbook \$12 of Soy Oil Processing and Utilization

Order from AOCS,
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