

Entrepreneur India

106-E, Kamla Nagar, New Delhi-110007, India.

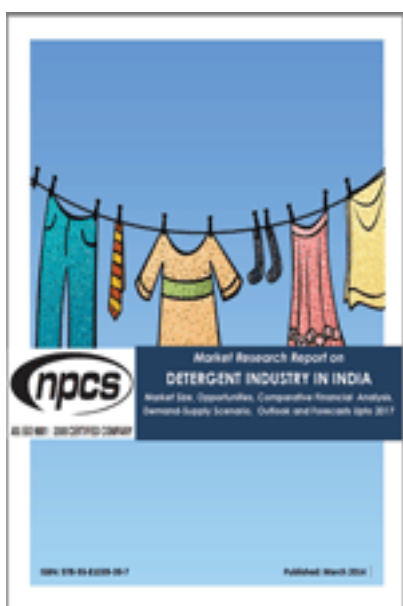
Tel: 91-11-23843955, 23845654, 23845886, +918800733955,

Mobile: +91-9811043595.

Email: npcs.ei@gmail.com, info@entrepreneurindia.co

Website: www.entrepreneurIndia.co

Detergent Industry in India (Market Size, Opportunities, Comparative Financial Analysis, Demand Supply Scenario, Outlook and Forecasts Upto 2017)-Market Research Report



Code:	ENI267
Format:	Paperback
Indian Price:	20000
US Price:	500
Pages:	
ISBN:	9789381039397
Publisher:	NIIR PROJECT CONSULTANCY SERVICES

The Market Research Report on DETERGENT INDUSTRY IN INDIA- Market Size, Opportunities, Comparative Financial Analysis, Demand-Supply Scenario, Outlook and Forecasts Upto 2017 released by Niir Project Consultancy Services, provides a comprehensive analysis of the detergent sector in India. The report covers industry aspects like overview & outlook of the industry, demand-supply scenario, opportunities & challenges in the sector and competitive landscape of the industry with market shares of the key players. The report also provides company profiles of players like Hindustan Unilever Ltd (HUL), Nirma Ltd and Rohit Surfactants Pvt Ltd (RSPL). Procter & Gamble (P&G) is also a key player in the laundry detergent sector in India.

The report embarks the analysis with elucidating the overview of the laundry detergent industry with classification and history of detergents in India. The report then moves ahead with the demand supply analysis of the sector. It states the past data of detergent sales volume of key players in the segment. Similarly supply side analysis enumerates production of detergent in India with forecasts upto 2017, past data of detergent production by key players as well as future projects announced by them. The next segment of the report examines the growth opportunities and challenges existing for the industry. Opportunities like growing disposable incomes & Indian middle class, growing washing machine penetration in the nation and low per capita consumption of detergents, exist for the sector whereas the industry faces challenges in the form of raw material price fluctuations and environmental hazards of using detergents. This section is followed by key player information segment which give insights like key player profiles, market shares and Herfindahl-Hirschman Index. It also shares vital information like shareholding pattern and financial summary of the key companies. The segment further includes in-depth comparative analysis of HUL and Nirma Ltd. It compares the two companies' performance in the detergent segment and provides details like detergent brands owned by the companies, detergent segment sales & sales contribution, segment profit, assets & liabilities and segment capital expenditure over 2009-13. Also, the data mentioned above is graphically presented to enhance the understanding of comparative analysis of the two companies. The report further gives a peer group analysis of all the players operating in the fabric wash segment. It covers contact information like address of registered office and director's name, key financials like plant location, raw material consumption and financial comparison covering balance sheet, profit & loss account and financial ratios.

Gradual shift experienced by the sector from mass segment to premium and super premium segment will bring another round of growth for the household detergents sector. The detergent sector in the laundry care industry has grown from INR 57 billion in 2003 to INR 130 billion in 2011, registering a growth of ~11% during the period. We estimate the industry to reach levels of INR 241 billion by 2017.

Reasons for Buying this Report:

- This research report helps you get a detail picture of the industry by providing overview of the industry along with the market structure, classification and opportunities for the sector
- This report helps to understand the present status of the industry by providing a scrutiny of the demand-supply situation with forecasts
- Report provides analysis and in-depth financial comparison of major players/competitors
- The report provides in-depth analysis of the two major players of the segment- HUL and Nirma Ltd, which will help highlight the performance of the companies in the detergent segment
- The report provides forecasts of key parameters which helps to anticipate the industry performance

Our Approach:

- Our research reports broadly cover Indian markets, present analysis, outlook and forecast for a period of five years.
- The market forecasts are developed on the basis of secondary research and are cross-validated through

interactions with the industry players

- We use reliable sources of information and databases. And information from such sources is processed by us and included in the report

Content:

1.OVERVIEW

1.1History of Detergents in India

1.2Segmentation (Price) of the Industry

2.DEMAND SUPPLY SCENARIO

2.1Demand

2.2Supply

3.OPPORTUNITIES & CHALLENGES

3.1Opportunities

3.1.1Rising washing machine penetration

3.1.2Rising Disposable Incomes & Middle Class

3.1.3Low Per Capita Detergent Consumption

3.1.4Growing Indian Population

3.2Challenges

3.2.1Environmental Hazards

3.2.2Fluctuating Raw Material Prices

4.KEY PLAYER INFORMATION

4.1Key Player Profiles

4.1.1Hindustan Unilever Ltd

4.1.2Nirma Ltd

4.1.3RSPL

4.2Herfindahl–Hirschman Index (HHI)- Market Share Index

4.3HUL vs. Nirma Ltd- A Comparison

5.PEER GROUP FINANCIALS

5.1Contact Information

5.1.1Registered Office Address

5.1.2Director's Name

5.2Key Financials

5.2.1Plant Locations

5.2.2Product Capacity & Sales

5.2.3Raw Material Consumption

5.3Financial Comparison

5.3.1Assets

5.3.2Liabilities

5.3.3Growth in Assets & Liabilities

5.3.4Structure of Assets & Liabilities

5.3.5Income & Expenditure

5.3.6Growth in Income & Expenditure

5.3.7Cash Flow

5.3.8Liquidity Ratios

5.3.9Profitability Ratios

5.3.10Return Ratios

5.3.11Working Capital & Turnover Ratios

6.INDUSTRY SIZE & OUTLOOK

LIST OF FIGURES & TABLES

Figure 1 Detergent Sector in India- Classification

Figure 2 Detergent Sector in India- Consumption by Region

Figure 3 Nirma & HUL- Detergent Sales Volume (2009-11, In Million Tonnes)

Figure 4 Hipolin Ltd- Detergent Sales Volume (2009-13, In Tonnes)

Figure 5 RSPL Ltd- Detergent Sales Volume (2008-11, In Million Bags)

Figure 6 Nirma & HUL- Detergent Production Volume (2009-11, In '000 Tonnes)

Figure 7 Hipolin Ltd- Detergent Production Volume (2009-13, In '000 Tonnes)

Figure 8 Washing Machine Sales in India (2008-17, In Million Units)

Figure 9 Washing Machine Penetration in India

Figure 10 Indian Middle Class Population (Current-2026)

Figure 11 India's Annual Per Capita Income (2008-13, In INR)

Figure 12 Per Capita Consumption of Detergent in Selected Countries (In INR)

Figure 13 Population of India (2008-17, In Millions)

Figure 14 HUL- Shareholding Pattern (Dec 2013)

Figure 15 Nirma Ltd- Shareholding Pattern

Figure 16 Market Share of Key Players

Figure 17 HUL & Nirma Ltd- Detergent Brands

Figure 18 Nirma Ltd- Soaps, Surfactants & Detergents Segment Sales (2009-13, In INR Millions)

Figure 19 HUL- Soaps, Surfactants & Detergents Segment Sales (2009-13, In INR Millions)

Figure 20 Nirma Ltd- Soaps, Surfactants & Detergents Segment Sales Contribution Trend (2009-13)

Figure 21 HUL- Soaps, Surfactants & Detergents Segment Sales Contribution Trend (2009-13)

Figure 22 Nirma Ltd- Soaps, Surfactants & Detergent Segment Performance (2009-13, In INR Million)

Figure 23 HUL- Soaps, Surfactants & Detergent Segment Performance (2009-13, In INR Million)

Figure 24 Nirma Ltd- Soaps, Surfactants & Detergents Segment Assets & Liabilities (2009-13, In INR Millions)

Figure 25 Nirma Ltd- Soaps, Surfactants & Detergent Segment Capital Expenditure Trend (2009-13, In INR Millions)

Figure 26 HUL- Soaps, Surfactants & Detergent Segment Capital Expenditure Trend (2009-13, In INR Millions)

Figure 27 Indian Detergent Sector- Market Size (2003-17, In INR Billions)

Table 1 Upcoming Capex Projects in the Sector

Table 2 HUL- Plant Locations (March 2013)

Table 3 HUL- Consolidated Executive Summary (2011-13)

Table 4 Nirma Ltd- Plant Locations (March 2013)

Table 5 Nirma Ltd- Consolidated Financial Summary (2011-13)

Table 6 HUL & Nirma Ltd- General Information

Table 7 HUL & Nirma Ltd- Soaps, Surfactants & Detergents Segment Sales Comparison (2009-13, In INR Million)

Table 8 HUL & Nirma Ltd- Soaps, Surfactants & Detergents Segment Performance (2009-13, In INR Millions)

Table 9 HUL & Nirma Ltd- Soaps, Surfactants & Detergents Segment Capital Expenditure (2009-13, In INR Millions)

Table 10 HUL & Nirma Ltd- Capital Expenditure Projects

EXECUTIVE SUMMARY

The detergent market is a mature growth segment in the Indian FMCG sector and has been growing in early double digits since the last decade. The industry is characterized by high MNC presence and several unorganized small players operating in the segment. MNC's like Unilever and Procter & Gamble seem to dominate the Indian detergent terrain followed by some noteworthy Indian companies like Rohit Surfactants Pvt Ltd and Nirma Ltd which have been able to make their mark in the segment.

Opportunities in the Sector

- Low Per Capita Consumption of Detergents
- Rising Washing Machine Penetration
- Rising Disposable Incomes & Middle Class Population
- Escalation Indian Population

The detergent sector in India is all set for another round of stable growth period. Growing Indian population, rising disposable incomes, low per capita consumption of detergent as well as rising washing machine penetration in the nation will provide ample opportunity for the detergent growth in the sector. Growing awareness about cleanliness among people will be another feather in the hat.

The detergent sector in the nation has grown from INR 57 billion in 2003 to INR 130 billion in 2011, registering a growth of ~11% during the period. We estimate the industry to reach levels of INR 241 billion by 2017.

1. OVERVIEW

The detergent market is a mature growth segment in the Indian FMCG sector and has been growing in early double digits since the last decade. The industry is characterized by high MNC presence and several unorganized small players operating in the segment. MNC's like Unilever and Procter & Gamble seem to dominate the Indian detergent terrain followed by some noteworthy Indian companies like Rohit Surfactants Pvt Ltd and Nirma Ltd which have been able to make their mark in the segment.

Indian detergent sector can be divided into two broad categories- Synthetic detergents and oil based laundry soaps. The chart below illustrates the classification of the same.

Figure 1 Detergent Sector in India- Classification

Source: NPCS Research

Earlier the industry was dominated by oil based laundry soaps but gradually synthetic detergent made inroads into the industry. Over the time, synthetic detergent category has seen tremendous growth and today it is the most popular category of detergents.

Synthetic detergents gained popularity on the back of better cleaning performance than oil based soaps.

The Indian market for detergents is fairly mature with high penetration levels. The chart below demonstrates the region-wise consumption break up of detergents in India.

Figure 2 Detergent Sector in India- Consumption by Region

Source: CIER

1.1 History of Detergents in India

1.2 Segmentation (Price) of the Industry

NIIR Project Consultancy Services (NPCS) is a reliable name in the industrial world for offering integrated technical consultancy services. Its various services are: Pre-feasibility study, New Project Identification, Project Feasibility and Market Study, Identification of Profitable Industrial Project Opportunities, Preparation of Project Profiles and Pre-Investment and Pre-Feasibility Studies, Market Surveys and Studies, Preparation of Techno-Economic Feasibility Reports, Identification and Selection of Plant and Machinery, Manufacturing Process and or Equipment required, General Guidance, Technical and Commercial Counseling for setting up new industrial projects and industry. NPCS also publishes various technology books, directory, databases, detailed project reports, market survey reports on various industries and profit making business. Besides being used by manufacturers, industrialists and entrepreneurs, our publications are also used by Indian and overseas professionals including project engineers, information services bureau, consultants and consultancy firms as one of the input in their research.

NIIR PROJECT CONSULTANCY SERVICES

106-E, Kamla Nagar, New Delhi-110007, India.

Tel: 91-11-23843955, 23845654, 23845886, +918800733955

Mobile: +91-9811043595

Email: npcs.ei@gmail.com , info@entrepreneurindia.co

Website: www.entrepreneurIndia.co