

CHAPTER ONE: INTRODUCTION.....	1
STUDY OBJECTIVES.....	1
REASONS FOR DOING THIS STUDY.....	1
INTENDED AUDIENCE.....	2
SCOPE OF THE STUDY.....	2
METHODOLOGY.....	2
INFORMATION SOURCES.....	2
ABOUT THE AUTHOR.....	2
RELATED BCC REPORTS.....	3
BCC ONLINE SERVICES.....	3
DISCLAIMER.....	4
 CHAPTER TWO: EXECUTIVE SUMMARY.....	 5
EXECUTIVE SUMMARY.....	5
<i>SUMMARY TABLE WORLDWIDE REVENUE OF ANTISEPTICS AND DISINFECTANTS, THROUGH 2016 (\$ MILLIONS)</i>	6
<i>SUMMARY FIGURE WORLDWIDE REVENUE OF ANTISEPTICS AND DISINFECTANTS, 2009-2016 (\$ MILLIONS)</i>	6
 CHAPTER THREE: OVERVIEW.....	 7
DEFINITIONS.....	7
MECHANISM OF ACTION OF ANTISEPTICS AND DISINFECTANTS.....	8
ACTION ON MEMBRANE.....	8
DENATURATION OF CELLULAR PROTEINS.....	8
INACTIVATION OF KEY ENZYMES.....	9
ALKYLATION OF AMINO-GROUP.....	9
DAMAGE TO NUCLEIC ACIDS.....	9
SELECTION CRITERIA FOR DISINFECTANT.....	9
SPEED OF ACTION.....	10
EFFICACY.....	10
HEALTH AND SAFETY.....	10
ECOLOGICAL PROFILE.....	10
MATERIAL COMPATIBILITY.....	11
FACTORS AFFECTING THE ACTIVITY OF DISINFECTANTS.....	11
LENGTH OF TIME.....	11
AGE.....	11
CONCENTRATION AND POTENCY.....	11
TEMPERATURE.....	11
PH LEVELS.....	12
HARDNESS OF WATER.....	12
MICROBIAL RESISTANCE.....	12
FACTORS THAT AFFECT THE ACTIVITY OF ANTISEPTICS.....	12
CONCENTRATION.....	12

PRESENCE OF ORGANIC MATTER.....	13
CONTACT TIME.....	13
CHAPTER FOUR: CLASSIFICATION	14
BIGUANIDES AND AMIDINES	14
POLYHEXANIDE	14
CHLORHEXIDINE	15
PHENOL AND DERIVATIVES	15
PHENOL.....	15
HEXACHLOROPHENE.....	16
TRICLOSAN.....	16
CHLOROXYLENOL.....	17
PENTACHLOROPHENOL.....	17
QUATERNARY AMMONIUM COMPOUNDS.....	17
BENZALKONIUM CHLORIDE	18
BENZETHONIUM CHLORIDE	18
CETRIMONIUM COMPOUNDS.....	19
CETYLPYRIDINIUM	19
IODINE PRODUCTS.....	19
POVIDONE IODINE	19
TINCTURE OF IODINE.....	20
SILVER COMPOUNDS.....	20
OXIDIZING AGENTS.....	21
SODIUM HYPOCHLORITE.....	21
CALCIUM HYPOCHLORITE	21
CHLORAMINES	22
<i>TABLE 1 MONOCHLORAMINES VS. CHLORINE DISINFECTANT</i>	22
CHLORINE DIOXIDE	23
HYDROGEN PEROXIDE.....	23
ALDEHYDES	23
FORMALDEHYDE	24
GLUTARALDEHYDE.....	24
ALCOHOLS.....	25
OTHER ANTISEPTICS AND DISINFECTANTS.....	25
8-HYDROXYQUINOLINE.....	26
DEQUALINIUM.....	26
CHLOROQUINALDOL.....	26
OXYQUINOLINE.....	26
GLYCOLIC ACID.....	26
OTHER CLASSIFICATION OF ANTISEPTICS AND DISINFECTANTS	27
LOW-LEVEL DISINFECTANTS	27
INTERMEDIATE-LEVEL DISINFECTANTS	27
HIGH-LEVEL DISINFECTANTS.....	28

CHAPTER FIVE: REGULATORY ASPECTS	29
REGULATORY ASPECTS	29
NEW ANTISEPTICS AND DISINFECTANT APPROVALS	30
<i>TABLE 2 APPROVED DISINFECTANTS AND ANTISEPTICS, 2007–</i>	
<i>2009</i>	30
<i>TABLE 2 (CONTINUED)</i>	31
<i>TABLE 2 (CONTINUED)</i>	32
<i>TABLE 2 (CONTINUED)</i>	33
<i>TABLE 3 NUMBER OF NEW PRODUCT APPROVALS IN EACH YEAR,</i>	
<i>2007-2009</i>	33
<i>FIGURE 1 NUMBER OF NEW PRODUCT APPROVALS, 2007-2009</i>	34
 CHAPTER SIX: INDUSTRY STRUCTURE.....	 35
MANUFACTURERS/ SUPPLIERS OF ANTISEPTICS AND	
DISINFECTANTS	35
BIGUANIDES AND AMIDINES.....	35
<i>TABLE 4 LEADING MANUFACTURERS/SUPPLIERS OF</i>	
<i>BIGUANIDES AND AMIDINES</i>	35
<i>TABLE 5 LEADING MANUFACTURERS/SUPPLIERS OF PHENOL</i>	
<i>AND DERIVATIVES</i>	36
<i>TABLE 5 (CONTINUED)</i>	37
<i>TABLE 6 LEADING MANUFACTURERS/SUPPLIERS OF IODINE</i>	
<i>AND IODOPHORS</i>	37
<i>TABLE 7 LEADING MANUFACTURERS/SUPPLIERS OF</i>	
<i>QUATERNARY AMMONIUM PRODUCTS</i>	38
<i>TABLE 7 (CONTINUED)</i>	39
<i>TABLE 8 LEADING MANUFACTURERS/SUPPLIERS OF SILVER</i>	
<i>PRODUCTS</i>	40
<i>TABLE 9 LEADING MANUFACTURERS/SUPPLIERS OF</i>	
<i>ALDEHYDE-BASED PRODUCTS</i>	40
<i>TABLE 10 LEADING MANUFACTURERS/SUPPLIERS OF ALCOHOL-</i>	
<i>BASED PRODUCTS</i>	41
<i>TABLE 10 (CONTINUED)</i>	42
<i>TABLE 11 LEADING MANUFACTURERS/SUPPLIERS OF OXIDIZING</i>	
<i>AGENTS</i>	42
<i>TABLE 11 (CONTINUED)</i>	43
<i>TABLE 12 LEADING MANUFACTURERS/SUPPLIERS OF OTHERS</i>	
<i>CATEGORY AS ANTISEPTICS AND DISINFECTANTS</i>	43
<i>TABLE 12 (CONTINUED)</i>	44
MARKET SHARES OF INDUSTRY LEADERS OF ANTISEPTICS	
AND DISINFECTANTS	44
BIGUANIDES AND AMIDINES.....	44
<i>TABLE 13 WORLDWIDE MARKET SHARES OF</i>	
<i>MANUFACTURERS/SUPPLIERS OF BIGUANIDES AND</i>	
<i>AMIDINES, 2010 (%)</i>	44

<i>FIGURE 2 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF BIGUANIDES AND AMIDINES, 2010 (%).....</i>	<i>45</i>
<i>PHENOL AND DERIVATIVES.....</i>	<i>45</i>
<i>TABLE 14 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF PHENOL AND DERIVATIVES, 2010 (%).....</i>	<i>46</i>
<i>FIGURE 3 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF PHENOL AND DERIVATIVES, 2010 (%).....</i>	<i>46</i>
<i>IODINE PRODUCTS.....</i>	<i>46</i>
<i>TABLE 15 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF IODINE PRODUCTS, 2010 (%).....</i>	<i>47</i>
<i>FIGURE 4 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF IODINE PRODUCTS, 2010 (%).....</i>	<i>47</i>
<i>QUARTERNARY AMMONIUM COMPOUNDS.....</i>	<i>48</i>
<i>TABLE 16 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF QUARTERNARY AMMONIUM COMPOUNDS, 2010 (%).....</i>	<i>48</i>
<i>FIGURE 5 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF QUARTERNARY AMMONIUM COMPOUNDS, 2010 (%).....</i>	<i>48</i>
<i>SILVER PRODUCTS.....</i>	<i>49</i>
<i>TABLE 17 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF SILVER PRODUCTS, 2010 (%).....</i>	<i>49</i>
<i>FIGURE 6 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF SILVER PRODUCTS, 2010 (%).....</i>	<i>49</i>
<i>ALDEHYDES.....</i>	<i>50</i>
<i>TABLE 18 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF ALDEHYDE-BASED PRODUCTS, 2010 (%).....</i>	<i>50</i>
<i>FIGURE 7 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF ALDEHYDE-BASED PRODUCTS, 2010 (%).....</i>	<i>50</i>
<i>ALCOHOLS.....</i>	<i>51</i>
<i>TABLE 19 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF ALCOHOL-BASED PRODUCTS, 2010 (%).....</i>	<i>51</i>
<i>FIGURE 8 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF ALCOHOL-BASED PRODUCTS, 2010 (%).....</i>	<i>51</i>
<i>OXIDIZING AGENTS.....</i>	<i>52</i>

TABLE 20 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF OXIDIZING AGENTS, 2010 (%).....	52
FIGURE 9 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF OXIDIZING AGENTS, 2010 (%).....	52
OTHERS	53
TABLE 21 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF OTHERS CATEGORY OF ANTISEPTICS AND DISINFECTANTS, 2010 (%).....	53
FIGURE 10 WORLDWIDE MARKET SHARES OF MANUFACTURERS/SUPPLIERS OF OTHERS CATEGORY OF ANTISEPTICS AND DISINFECTANTS, 2010 (%).....	53
CHAPTER SEVEN: NEW DEVELOPMENTS.....	54
TABLE 22 NEW DEVELOPMENTS, 2008 TO MARCH 2011.....	54
TABLE 22 (CONTINUED).....	55
SOME OTHER DEVELOPMENTS IN RESEARCH INSTITUTES.....	56
CHAPTER EIGHT: MARKET ANALYSIS.....	57
Market Revenue	57
TABLE 23 WORLDWIDE MARKET ANTISEPTICS AND DISINFECTANTS, 2009 TO 2016 (\$ MILLIONS).....	58
FIGURE 11 WORLDWIDE MARKET FOR ANTISEPTICS AND DISINFECTANTS, 2009-2016 (\$ MILLIONS).....	58
BIGUANIDES AND AMIDINES	59
Market Overview	59
Market Revenue	60
TABLE 24 WORLDWIDE MARKET FOR BIGUANIDES AND AMIDINES BY REGION, THROUGH 2016 (\$ MILLIONS).....	61
FIGURE 12 WORLDWIDE MARKET FOR BIGUANIDES AND AMIDINES BY REGION, THROUGH 2016 (\$ MILLIONS).....	61
PHENOL AND DERIVATIVES	61
Market Overview	62
Market Revenue	62
TABLE 25 WORLDWIDE MARKET FOR PHENOL AND DERIVATIVES BY REGION, THROUGH 2016 (\$ MILLIONS)	63
FIGURE 13 WORLDWIDE MARKET FOR PHENOL AND DERIVATIVES BY REGION, 2009-2016 (\$ MILLIONS).....	63
IODINE PRODUCTS.....	63
MARKET OVERVIEW.....	64
MARKET REVENUE.....	64
TABLE 26 WORLDWIDE MARKET FOR IODINE PRODUCTS BY REGION, THROUGH 2016 (\$ MILLIONS)	65

<i>FIGURE 14 WORLDWIDE MARKET FOR IODINE PRODUCTS BY REGION, 2009-2016 (\$ MILLIONS)</i>	65
<i>QUATERNARY AMMONIUM COMPOUNDS</i>	66
<i>MARKET OVERVIEW</i>	66
<i>MARKET REVENUE</i>	67
<i>TABLE 27 WORLDWIDE MARKET FOR QUATERNARY AMMONIUM PRODUCTS BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	67
<i>FIGURE 15 WORLDWIDE MARKET FOR QUATERNARY AMMONIUM PRODUCTS BY REGION, 2009-2016 (\$ MILLIONS)</i>	68
<i>SILVER PRODUCTS</i>	68
<i>MARKET OVERVIEW</i>	68
<i>MARKET REVENUE</i>	70
<i>TABLE 28 WORLDWIDE MARKET FOR SILVER PRODUCTS BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	70
<i>FIGURE 16 WORLDWIDE MARKET FOR SILVER PRODUCTS BY REGION, 2009-2016 (\$ MILLIONS)</i>	70
<i>ALDEHYDE PRODUCTS</i>	71
<i>MARKET OVERVIEW</i>	71
<i>MARKET REVENUE</i>	72
<i>TABLE 29 WORLDWIDE MARKET FOR ALDEHYDE-BASED PRODUCTS BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	72
<i>FIGURE 17 WORLDWIDE MARKET FOR ALDEHYDE-BASED PRODUCTS BY REGION, 2009-2016 (\$ MILLIONS)</i>	72
<i>ALCOHOLS</i>	73
<i>MARKET OVERVIEW</i>	73
<i>MARKET REVENUE</i>	74
<i>TABLE 30 WORLDWIDE MARKET FOR ALCOHOL-BASED PRODUCTS BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	74
<i>FIGURE 18 WORLDWIDE MARKET FOR ALCOHOL-BASED PRODUCTS BY REGION, 2009-2016 (\$ MILLIONS)</i>	75
<i>OXIDIZING AGENTS</i>	75
<i>MARKET OVERVIEW</i>	76
<i>MARKET REVENUE</i>	77
<i>TABLE 31 WORLDWIDE MARKET FOR OXIDIZING AGENTS BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	77
<i>FIGURE 19 WORLDWIDE MARKET FOR OXIDIZING AGENTS BY REGION, 2009-2016 (\$ MILLIONS)</i>	77
<i>OTHERS</i>	78
<i>MARKET OVERVIEW</i>	78
<i>MARKET REVENUE</i>	78
<i>TABLE 32 WORLDWIDE MARKET FOR OTHERS CATEGORY OF ANTISEPTICS AND DISINFECTANTS BY REGION, THROUGH 2016 (\$ MILLIONS)</i>	79

<i>FIGURE 20 WORLDWIDE MARKET FOR OTHERS CATEGORY OF ANTISEPTICS AND DISINFECTANTS BY REGION, 2009-2016 (\$ MILLIONS)</i>	79
MARKET SHARES OF ANTISEPTICS AND DISINFECTANTS, BY REGION	79
<i>TABLE 33 WORLDWIDE ANTISEPTICS AND DISINFECTANT MARKET SHARES BY REGION, 2010 (%)</i>	80
<i>FIGURE 21 WORLDWIDE ANTISEPTICS AND DISINFECTANT MARKET SHARES BY REGION, 2010 (%)</i>	80
CHAPTER NINE: MARKET BY END USERS	81
<i>TABLE 34 GLOBAL MARKET FOR ANTISEPTICS AND DISINFECTANTS BY END USERS, THROUGH 2016 (\$ MILLIONS)</i>	81
<i>FIGURE 22 GLOBAL MARKET FOR ANTISEPTICS AND DISINFECTANTS BY END USERS, 2009-2016 (\$ MILLIONS)</i>	82
DOMESTIC ANTISEPTICS AND DISINFECTANTS	82
MARKET REVENUE.....	83
<i>TABLE 35 GLOBAL SALES OF DOMESTIC ANTISEPTICS AND DISINFECTANTS, THROUGH 2016 (\$ MILLIONS)</i>	84
<i>FIGURE 23 GLOBAL SALES OF DOMESTIC ANTISEPTICS AND DISINFECTANTS, 2009-2016 (\$ MILLIONS)</i>	84
Global Share	84
<i>TABLE 36 GLOBAL SHARE OF REGIONS IN DOMESTIC ANTISEPTICS AND DISINFECTANTS IN 2010 (%)</i>	85
<i>FIGURE 24 GLOBAL SHARE OF REGIONS IN DOMESTIC ANTISEPTICS AND DISINFECTANTS IN 2010 (%)</i>	85
INSTITUTIONAL ANTISEPTICS AND DISINFECTANTS.....	85
MARKET REVENUE.....	86
<i>TABLE 37 GLOBAL SALES OF INSTITUTIONAL ANTISEPTICS AND DISINFECTANTS, THROUGH 2016 (\$ MILLIONS)</i>	86
<i>FIGURE 25 GLOBAL SALES OF INSTITUTIONAL ANTISEPTICS AND DISINFECTANTS, THROUGH 2016 (\$ MILLIONS)</i>	86
HEALTH CARE USAGE	87
MARKET REVENUE.....	87
<i>TABLE 38 GLOBAL SALES OF HEALTH CARE ANTISEPTICS AND DISINFECTANTS, THROUGH 2016 (\$ MILLIONS)</i>	87
<i>FIGURE 26 GLOBAL SALES OF HEALTH CARE ANTISEPTICS AND DISINFECTANTS, 2009-2016 (\$ MILLIONS)</i>	88
GLOBAL SHARE	88
<i>TABLE 39 GLOBAL SHARE FOR HEALTH CARE ANTISEPTICS AND DISINFECTANTS IN 2010 (%)</i>	88
<i>FIGURE 27 GLOBAL SHARE OF HEALTH CARE ANTISEPTICS AND DISINFECTANTS IN 2010 (%)</i>	89
INDUSTRIAL AND COMMERCIAL USE.....	89
MARKET REVENUE.....	90

<i>TABLE 40 GLOBAL MARKET FOR ANTISEPTICS AND DISINFECTANTS USED IN INDUSTRIES AND COMMERCIAL PLACES, THROUGH 2016 (\$ MILLIONS)</i>	90
<i>FIGURE 28 GLOBAL MARKET FOR ANTISEPTICS AND DISINFECTANTS USED IN INDUSTRIES AND COMMERCIAL PLACES, 2009-2016 (\$ MILLIONS)</i>	91
GLOBAL SHARE	91
<i>TABLE 41 GLOBAL SHARE FOR INDUSTRIAL AND COMMERCIAL ANTISEPTICS AND DISINFECTANTS, IN 2010 (%)</i>	91
<i>FIGURE 29 GLOBAL SHARE FOR INDUSTRIAL AND COMMERCIAL ANTISEPTICS AND DISINFECTANTS, IN 2010 (%)</i>	92
MARKET SHARE OF APPLICATIONS	92
<i>TABLE 42 SHARE OF ANTISEPTICS AND DISINFECTANTS BY END USERS, IN 2010 (%)</i>	92
<i>FIGURE 30 SHARE OF ANTISEPTICS AND DISINFECTANTS BY END USERS, IN 2010 (%)</i>	93
CHAPTER TEN: PATENT ANALYSIS	94
PATENTS BY YEAR.....	94
<i>TABLE 43 NUMBER OF SIGNIFICANT PATENTS BY YEAR, 2009–2011 (NUMBER/%)</i>	95
<i>FIGURE 31 NUMBER OF SIGNIFICANT PATENTS BY YEAR, 2009–2011</i>	95
<i>FIGURE 32 NUMBER OF PATENTS BY YEAR, 2009–2011 (%)</i>	96
PATENTS BY TYPE	96
<i>TABLE 44 NUMBER OF PATENTS BY TYPE, 2009–2011</i>	97
<i>FIGURE 33 PATENTS BY TYPE, 2009–2011 (%)</i>	97
<i>FIGURE 33 (CONTINUED)</i>	98
PATENTS BY COMPANY	98
<i>TABLE 45 NUMBER OF U.S. PATENTS BY COMPANY FOR ANTISEPTICS AND DISINFECTANTS, 2009–2011</i>	99
<i>FIGURE 34 NUMBER OF U.S. PATENTS BY COMPANY FOR ANTISEPTICS AND DISINFECTANTS, 2009–2011</i>	100
PATENTS BY COUNTRY	101
<i>TABLE 46 NUMBER OF U.S. PATENTS BY COUNTRY, 2009-2011</i>	101
<i>FIGURE 35 NUMBER OF U.S. PATENTS BY COUNTRY, 2009–2011</i>	102
PATENTS BY ASSIGNEE TYPE.....	102
<i>TABLE 47 PATENTS BY ASSIGNEE TYPE FOR ANTISEPTICS AND DISINFECTANTS, 2009–2011</i>	103
<i>FIGURE 36 PATENTS BY ASSIGNEE TYPE FOR ANTISEPTICS AND DISINFECTANTS, 2009–2011</i>	103
CHAPTER ELEVEN: STRATEGIES AND PROSPECTS	104
FACTORS AFFECTING THE MARKET OF ANTISEPTICS AND DISINFECTANTS	104

GROWING AWARENESS	104
INVOLVEMENT OF MEDIA	105
SHARP RISE IN INFECTIONS	105
SWINE FLU OUTBREAK	106
GLOBAL INITIATIVES.....	106
DEMAND OF APPLICATION-SPECIFIC PRODUCTS	106
COMPETITION AND DEMAND	107
MANUFACTURER’S STRATEGIES.....	107
MERGERS AND ACQUISITIONS.....	107
MERGERS AND ACQUISITIONS (CONTINUED)	108
CHAPTER TWELVE: COMPANY PROFILES	109
ABC COMPOUNDING COMPANY	109
ACTAVIS	109
AGION TECHNOLOGIES	110
ALDA PHARMACEUTICAL CORPORATION	110
AMERICAN BIOTECH LABS.....	111
AMREP INC.	112
APLICARE INC.	112
BIO-CIDE INTERNATIONAL INC.	113
BIOTECH MEDICS INC.	113
CANTEL MEDICAL CORPORATION	114
CARDINAL HEALTH.....	115
CAREFUSION CORPORATION.....	115
CCP INDUSTRIES	116
CLOROX COMPANY (THE)	117
COLGATE PALMOLIVE.....	118
DALEY INTERNATIONAL LTD.	118
DIAL PROFESSIONAL SERIES	119
DIVERSEY INC.	120
DOW MICROBIAL CONTROL.....	120
DUPONT	121
DURABAN	121
ECOLAB INC.	122
GOJO INDUSTRIES.....	123
JOHNSON & JOHNSON	123
3M COMPANY	124
MEDICAL CHEMICAL CORP.....	124
MELROSE CHEMICAL LTD.....	125
METREX RESEARCH CORPORATION	125
PALMERO HEALTHCARE.....	126
PROCTER AND GAMBLE COMPANY	126
PROFESSIONAL DISPOSABLES INTERNATIONAL	127
PURE BIOSCIENCES	128
RECKITT BENCKISER	128

SAFETEC OF AMERICA	129
SINOFRESH HEALTHCARE INC	129
SPORICIDIN INTERNATIONAL.....	130
STEPAN COMPANY	130
STERILEX CORPORATION	131
STERIS CORPORATION	131
VERIDIEN CORPORATION.....	132
VIROX TECHNOLOGIES	133
XTTRIUM LABORATORIES	133
CHAPTER THIRTEEN: APPENDIX I—ABBREVIATIONS/ DEFINITIONS	134