

Kitchen And Warewashing Chemicals Market Size, Share & Trends Analysis Report By Product (Hand Dishwashing, Commercial Automatic Dishwashing), By End Use (Healthcare, Food Service), By Supply, By Type, By Enterprise Size, By Region (North America, Europe, Asia Pacific, MEA), And Segment Forecasts, 2026 - 2033

<https://marketpublishers.com/r/KFA055767F8EEN.html>

Date: May 2026

Pages: 80

Price: US\$ 3,950.00 (Single User License)

ID: KFA055767F8EEN

Abstracts

Kitchen And Warewashing Chemicals Market Summary

The global kitchen and warewashing chemicals market size was estimated at USD 16.66 billion in 2025 and is projected to reach USD 24.17 billion by 2033, growing at a CAGR of 4.8% from 2026 to 2033. The market is principally propelled by the rapid global expansion of commercial foodservice establishments, including quick-service restaurants, institutional catering, and cloud kitchens, which generate consistently high warewashing volumes requiring specialized chemical inputs.

Tightening food safety and sanitation regulations across major economies are further mandating the use of validated chemical programs for surface sanitization and dishwashing. At the same time, procurement preferences among hospitality and institutional buyers are shifting toward eco-certified, phosphate-free, and biodegradable formulations. The rise of delivery-only foodservice models has also created a structurally distinct demand source, as ghost kitchens operate continuously with elevated wash cycles per square foot, driving higher consumption of detergents, rinse aids, and sanitizers. For instance, in June 2025, Bengaluru-based Curefoods filed its Draft Red Herring Prospectus with SEBI to raise INR 800 crore through an IPO aimed at expanding cloud kitchen and retail operations, signaling accelerating infrastructure

investments that are expected to amplify downstream chemical demand across Asian markets.

Foodservice operators are also navigating an increasingly prescriptive regulatory environment governing the sanitization of food contact surfaces and dishware. According to the U.S. Food & Drug Administration, in October 2024, the FDA launched its Human Foods Program, consolidating the Center for Food Safety and Applied Nutrition, the Office of Food Policy and Response, and field operations into a single framework focused on microbiological food safety, chemical safety, and post-market assessment of food-contact substances. The restructuring is expected to strengthen enforcement consistency across commercial kitchens, compelling operators to adopt validated warewashing chemical programs.

Institutional procurement teams, particularly across hospitality chains and contract catering providers, are increasingly mandating compliance with sustainability certifications such as the EU Ecolabel and Cradle to Cradle standards. This has accelerated demand for reformulated warewashing chemistries that replace phosphates, chlorine-based actives, and quaternary ammonium compounds with plant-derived surfactants and enzymatic actives. For instance, in 2024, Diversey, a Solenis company, launched two new mechanical warewashing products under the SURE brand that meet stringent EU Ecolabel requirements.

In addition, the transition toward reusable packaging and alternatives to single-use plastics has further created a specialized niche within warewashing chemicals. For instance, in 2024, Diversey introduced the Suma PolyWash L56R and Suma PolyDry A9 system, specifically designed for reusable plastic ware, coinciding with implementation targets under the EU Single-Use Plastics Directive (2019/904), which established a 75% recyclability target for plastic cups and food containers by 2024, increasing to 90% by 2027.

The growing emphasis on hygiene, sanitation compliance, and operational efficiency across commercial kitchens, hospitality establishments, healthcare facilities, and institutional foodservice operations is significantly driving demand within the warewashing chemicals market. Increasing awareness regarding food safety standards and the prevention of cross-contamination has accelerated the adoption of advanced cleaning and sanitization solutions, particularly in automated dishwashing and kitchen maintenance applications. As a result, the warewashing chemicals market continues to witness strong momentum as foodservice operators increasingly invest in high-performance and sustainable cleaning products. In parallel, the broader industrial

cleaning chemicals market is also benefiting from rising industrial hygiene requirements and stricter regulatory frameworks across end use industries.

The expansion of quick-service restaurants, cloud kitchens, catering services, and institutional dining facilities is further contributing to the growth of the industrial and institutional cleaning chemicals market. Commercial operators are increasingly prioritizing concentrated, low-foaming, and environmentally sustainable formulations that improve cleaning efficiency while reducing water and energy consumption. This shift is creating substantial opportunities for manufacturers operating in the Industrial Cleaning Chemicals Market to develop innovative warewashing and kitchen cleaning solutions aligned with evolving customer and regulatory expectations. In addition, the integration of automated dispensing systems and smart warewashing technologies is enhancing chemical utilization efficiency across the warewashing chemicals market.

Another major factor supporting the growth of the industrial and institutional cleaning chemicals market is the increasing preference for worker-safe and eco-friendly cleaning formulations. Manufacturers are actively introducing phosphate-free, biodegradable, aluminum-safe, and caustic-free products to address growing sustainability concerns while ensuring high cleaning performance. The industrial cleaning chemicals market is also witnessing increased investments in research and development aimed at improving product efficacy, reducing environmental impact, and supporting regulatory compliance across commercial and institutional environments. Consequently, the warewashing chemicals market is expected to maintain steady long-term growth, supported by evolving hygiene standards, expanding foodservice infrastructure, and continuous product innovation within the industrial and institutional cleaning chemicals market.

Global Kitchen And Warewashing Chemicals Market Report Segmentation

This report forecasts revenue growth at global, regional & country levels and provides an analysis on the latest trends and opportunities in each of the sub-segment from 2021 to 2033. For this study, Grand View Research has segmented the kitchen and warewashing chemicals market report based on product, end use, supply, type, enterprise size, and region.

Product Outlook (Revenue, USD Million, 2021 - 2033)

Hand Dishwashing (HDW)

Commercial Automatic Dishwashing (c-ADW)

Sink & Drain Cleaners

Food Wash Solutions

Grill, Fryer, and Oven Cleaners

Others (Stainless Steel Cleaner, Bleach-based Cleaners, etc.)

End Use Outlook (Revenue, USD Million, 2021 - 2033)

Healthcare

Hospitals

Senior Living and Retirement Communities

Medical Centers (Life Science, Biotech, Research Centers)

Ambulatory Surgical Centers

Doctor's Offices and Clinics

Others (Small Rehab Centers, etc.)

Food Service

Restaurants & Beverage Outlets

Cafés, Bars, and Pubs

Catering Establishments

Informal and Mobile Food Service Establishments

Hotels & Hospitality

Hotels & Resorts

Non-Hotel & Alternative Hospitality Accommodation

Leisure and Entertainment Parks

Event Venues and Recreational Facilities

Industrial and Manufacturing Facilities

Food Processing and Beverage Facilities

Pharmaceutical Manufacturing

Defense & Aerospace Facilities

Building Service Contractors and Facility Management Companies

Retail & Public-Facing Commercial Spaces

Educational Institutions

Transportation and Travel

Airports

Railway Stations

Bus Terminals and Depots

Metro and Subway Systems

Ports and Harbors

Offices and Business Parks

Government Offices and Buildings

Others (Religious Institutions, etc.)

Supply Outlook (Revenue, USD Million, 2021 - 2033)

Contract

Service-Led Contract Holders

Building Service Contractors (BSCs)

Facilities Management (FM) Companies

End-user-led contract holders

Group Purchasing Organizations (GPOs)

Non-contract

Type Outlook (Revenue, USD Million, 2021 - 2033)

Contract

Product-Only Supply Contracts

Service Inclusive Contracts

Equipment Inclusive Supply Contracts

Training & Compliance Inclusive Contracts

Fully Integrated Hygiene-as-a-Service (HaaS)/Performance-Based

Non-contract

Enterprise Size Outlook (Revenue, USD Million, 2021 - 2033)

Small

Medium

Large

Regional Outlook (Revenue, USD Million, 2021 - 2033)

North America

U.S.

Canada

Europe

UK

Germany

France

Italy

Spain

Poland

Asia Pacific

China

India

Japan

South Korea

Australia & New Zealand

Malaysia

Vietnam

Thailand

Central & South America

Brazil

Argentina

Mexico

Middle East & Africa

South Africa

Saudi Arabia

UAE

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