

Colin A. Houston & Associates, Inc.
announces the availability of a new study of

SURFACTANTS FOR CONSUMER PRODUCTS NORTH AMERICAN FORECAST TO 2010

More than ever, suppliers of intermediates and surfactants for household detergents and personal care products need to understand the forces at work in consumer product markets, and their impact on surfactant sales and profitability.

Colin A. Houston & Associates, Inc. (CAHA) has published a multiclient study designed to give surfactant and intermediate suppliers information and analysis that will enable them to increase their sales and focus their development and marketing efforts in profitable directions.

This new study analyzes the changes taking place in consumer product markets and explains their implications for surfactant use. It provides specific information on each product category and perspective on the market position and prospects for surfactant customers and suppliers. As in previous CAHA studies, it also includes a comprehensive database of surfactant consumption by end use product and by surfactant.

The study was completed in June 2003. The following pages contain the complete table of contents and other details. For further information please contact CAHA at the address on the back cover.

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DESCRIPTION OF THE STUDY

CONSUMER PRODUCT MARKETS - NEW REALITIES

In North America today, many factors are shaping the evolution of consumer products. The events of September 11th have affected the attitudes and priorities of consumers. They are spending more time at home, and are more focused on caring for their homes. In an uncertain world, the familiarity of simple tasks and traditional brands is reassuring. They are also taking more time for themselves, and are drawn to personal care products that offer heightened sensory satisfaction, such as aromatherapy body lotions.

Companies are positioning their products to cater to these new attitudes, as well as taking into account the major trends of recent years, including more casual lifestyles, the desire for convenience, the aging of the baby boomer generation, the increasing popularity of club and warehouse stores, infomercials and Internet shopping.

Household Products

Large retailers such as Wal-Mart have become so important to the success of household detergents that they are a major influence on product pricing and positioning. Consequently, manufacturers of these products and their suppliers are under increasing competitive pressure. Detergent producers are responding by such actions as divesting traditional, but underperforming brands, and acquiring product lines or companies to secure their position in more profitable segments. For example, Procter & Gamble has sold its Oxydol^R detergent and Comet^R cleanser brands, and Church & Dwight acquired USA Detergents.

Another key issue is the new government standards for washing machine energy use, and the resulting introduction of high efficiency, front-loading machines that use less water and operate at lower temperatures. This development is spawning a whole new category of reformulated detergents designed to be effective in these new washing conditions.

Heavy duty liquids continue to grow at the expense of powders and also tablets, which were new to the North American market at the beginning of 2001 and peaked at around 4 percent market share by the end of 2001.

Personal Care Products

During the second half of the 1990s, U.S. sales of personal care products grew nearly 6 percent/year, led by the skin care segment which increased more than 10

percent/year. Over 1400 new skin care products were introduced in the U.S. and Canada in 2000, far more than in previous years, and this trend continued into the new millennium. Many of the new products are geared toward baby boomers in their 40s and 50s who want multifunctional products that will counteract the aging process. Creams, lotions, cleansers and moisturizers with anti-aging properties, as well as sunscreens and products that incorporate UV protection are benefitting from this trend.

Home spa products, such as bath oils and aromatherapy soaps and lotions are perceived as a relatively inexpensive luxury, offering the relaxation and stress-reducing benefits of a spa visit in the privacy of the home, and they are becoming ever more popular. On the other side of the coin, today's busy consumer wants every-day products to be multifunctional and convenient, and this is reflected in strong growth for pre-treated facial cloths as an alternative form of cleanser.

Men's products are one of the fastest-growing segments of the personal care market, and are evolving from a holiday gift market to a year-round segment as men purchase for themselves products specially designed for their skin care as well as grooming needs. Other segments are undergoing more radical changes. The oral care market is evolving rapidly, and market shares may shift as brands are extended to new types of products, such as tooth whitening strips and electric toothbrushes.

Surfactant Suppliers

The surfactant supply structure has been realigned in recent years by mergers and acquisitions. Major developments include the sale of portions of Albright & Wilson to Huntsman and Rhodia; the acquisition of Union Carbide, including Amerchol, by Dow; and Henkel's sale of Cognis. The acquisition of smaller, independent surfactant suppliers continues, for example, Lubrizol's recent purchase of Chemron. The new corporate entities are redefining their role as suppliers to consumer product markets, and all participants are feeling the effects of the changed competitive environment.

In addition, new intermediate and surfactant plants which came on stream in 2002 and 2003 suggest the possibility of major reformulations occurring in household detergents. Shell's detergent alcohol plant is supplying a new alcohol product for use as alcohol sulfate by Procter & Gamble. Huish has invested in a large methyl ester and methyl ester sulfonate facility, posing a new threat to linear alkylbenzene sulfonate.

As consumer product companies continue to explore new products and product forms, successful suppliers will be those who offer ingredients that differentiate their products through enhanced performance and new benefits.

FEATURES OF CAHA'S NEW STUDY

Market Environment

An overview of current and projected economic conditions in the U.S., Canada

and Mexico provides context for the discussion of growth prospects for consumer products. The chapter also analyzes the impact to date of the North American Free Trade Agreement on consumer products and surfactants, and how it is expected to affect product manufacturing and surfactant consumption through the forecast period.

Surfactant Intermediates

Three surfactant intermediates – Linear Alkylbenzene, Alkyldimethylamine and Detergent Alcohols – are critically important to the consumer product market, since their derivatives represent roughly 60 percent of the consumption of surfactants in consumer products. The study profiles each of these intermediates and discusses key issues such as the impact of new capacity and how market developments will affect pricing.

Major Organic Surfactants

This chapter details the supply structure for surfactants used in consumer products, with a discussion of the surfactant value chain and supplier integration. It also includes tables of ethoxylators and sulfators/sulfonators with plant locations and capacities for the U.S., Canada and Mexico. The chapter also includes profiles of six major surfactants that dominate the consumer products market, covering technology, producers, production, utilization and a demand forecast by application to 2010.

Performance Surfactants Overview

Five leading performance surfactants that are important to the strategic position of a number of surfactant suppliers are profiled in this chapter as outlined above.

Household Products

A comprehensive analysis of the household detergent market details market structure, market shares, product evolution, formulation trends, product and surfactant technology. The chapter discusses all the factors at work in the market, and reports surfactant consumption by type for nine major product categories.

Personal Care Products

This chapter analyzes the personal care market structure and details trends and surfactant use in ten individual categories of personal care products.

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	1998	2000	2002	2005	2010	AAGR % 2000-2010
Heavy duty liquids						
Heavy duty powders and tablets						
Light duty liquids						
Fine fabric detergents						
Fabric softeners						
Prewash products						
Bleaches						
Hard surface cleaners						
Automatic dish products						
TOTAL						

Table V-28								
U.S. - MAJOR SURFACTANT CONSUMPTION IN HEAVY DUTY LIQUIDS BY DETERGENT PRODUCER, 2002 (million lbs)								
Company	LABS	AES	AE	APE	SOAP	AO	APES	TOTAL
Procter & Gamble								
Unilever USA								
Church & Dwight								
Dial								
Colgate-Palmolive								
Private Label								
Other								
TOTAL								

Table V-34						
MEXICO - SURFACTANT CONSUMPTION IN HEAVY DUTY LIQUIDS, 1998-2010 (million lbs)						
	1998	2000	2002	2005	2010	AAGR % 2000-2010
Linear alkylbenzene sulfonates						
Akylphenol ethoxylates						
TOTAL						

Table V-41						
U.S. - SURFACTANT CONSUMPTION IN HEAVY DUTY POWDERS AND TABLETS, 1998-2010 (million lbs)						
	1998	2000	2002	2005	2010	AAGR % 2000-2010
Linear alkylbenzene sulfonates						
Alcohol sulfates						
Alcohol ethoxysulfates						
Alcohol ethoxylates						
Alkylphenol ethoxylates						
Soap						
Methyl ester sulfonates						
TOTAL						

Table V-102						
U.S. - SURFACTANT CONSUMPTION IN AUTODISH DETERGENTS, 1998-2010 (million lbs)						
	1998	2000	2002	2005	2010	AAGR % 2000-2010
Alcohol ethoxylates						
EO/PO block copolymers						
Linear alcohol alkoxyates						
Diphenyl oxide disulfonates						
Soap						
TOTAL						

Table 7

U.S. - CONSUMPTION OF PERSONAL CARE PRODUCTS, 1998-2010
(million lbs)

	1998	2000	2002	2005	2010	AAGR % 2000-2010
Shampoos						
Hair conditioners						
Hair gel/mousse						
Skin creams and lotions						
Bath and shower products						
Toilet soap bars						
Liquid hand soap						
Toothpaste						
Shaving preparations						
Miscellaneous personal care						
TOTAL						

Table VI-35

U.S. - SURFACTANT CONSUMPTION IN SHAMPOO, 1998-2010
(million lbs)

	1998	2000	2001	2002	2005	2010	AAGR % 2000-2010
ANIONICS							
Alcohol sulfates							
Alcohol ethoxysulfates							
Sulfosuccinates							
Sarcosinates							
SUBTOTAL							
NONIONICS							
Alcohol ethoxylates							
Alkanolamides							
Glycerol and glycol esters							
Sorbitol esters							
Silicone Copolyols							
SUBTOTAL							
CATIONICS							
Quaternary ammonium salts							
Polymeric Quaternaries							
SUBTOTAL							
AMPHOTERICIS							
Betaines							
Sultaines							
Amphoacetates							
SUBTOTAL							
OTHERS							
SUBTOTAL							
GRAND TOTAL							

QUALIFICATIONS AND PERSONNEL

Colin A. Houston & Associates Inc. was founded in 1971 to provide consulting services to the chemical industry worldwide. The primary area of expertise was and continues to be surfactants: raw materials, intermediates, major surfactants, and the surfactant-consuming industries. Other areas of activity include: a variety of industry studies on such topics as oilfield chemicals, detergent builders, ingredients for personal care products, and bleaching agents; engineering studies such as a worldwide study of glycerine evaporation plants with recommendations for improved efficiency; a world study of the state of the art in spray-drying detergents; contracts with the U.S. Government to develop industry effluent guidelines; and business strategy and acquisition studies.

In addition to surfactants, CAHA has studied other aspects of the detergent market including detergent builders, bleach systems, enzymes and fabric softeners. We have also developed a considerable database on personal care products. Similar studies have been conducted covering West Europe, Asia and South America markets. CAHA also publishes a bi-monthly newsletter, *Agglomerations*, covering international developments in compact detergents and a bi-monthly report *LAB Market Report*, providing up-to-date market information and analysis for the world detergent alkylate market.

The reputation thus earned by CAHA for comprehensive, high quality techno-economic and market analyses has led to a variety of engineering, marketing, and strategic planning studies for individual clients in North America, Latin America, the Middle East, Africa, West Europe, and the Asia/Pacific region.

The project team approach utilized by CAHA includes a core of senior and technical professionals augmented by expert consultant associates. The following brief synopses present the staff and consultants who carried out the study, *SURFACTANTS FOR CONSUMER PRODUCTS - NORTH AMERICAN FORECAST TO 2010*.

Joel H. Houston, President,

was the project leader for numerous multiclient studies including SURFACTANTS FOR CONSUMER PRODUCTS - NORTH AMERICAN FORECAST TO 2010, HIGHER ALCOHOLS: MARKET FORECAST TO 2010, SURFACTANTS FOR EMERGING MARKETS IN ASIA/PACIFIC, 1996-2010, OPPORTUNITIES IN PERFORMANCE SURFACTANTS IN THE U.S., SURFACTANTS FOR CONSUMER PRODUCTS - NORTH AMERICAN FORECAST TO 2008, and DETERGENT ALKYLATES - WORLD MARKETS, 1992-2005. He has guided CAHA's research in oleochemicals since 1980, and in detergents since 1987. Mr. Houston has extensive experience in projects for consumer products, has presented papers at CMRA, ECMRA and CSMA meetings, and is the editor of CAHA's global

detergent newsletter, AGGLOMERATIONS. He is a member of CDMA, AOCS and ASTM.

Marilyn L. Bradshaw, Vice President,

was the project leader for INDUSTRIAL APPLICATIONS OF SURFACTANTS - NORTH AMERICAN FORECAST TO 2010, POLYOLEFIN COMONOMERS - WORLD MARKETS, 1995-2005 and ALPHA-OLEFINS - WORLD MARKETS, 2000-2010. Other recent multiclient studies she has directed include THE U.S. METALWORKING INDUSTRY AND SURFACTANT CONSUMPTION, 1995-2005, U.S. I&I CLEANING PRODUCTS - SURFACTANT SUPPLIERS AND CUSTOMERS, and MAJOR INDUSTRIAL APPLICATIONS OF SURFACTANTS - NORTH AMERICAN FORECAST TO 2005. She is the editor of CAHA's monthly alpha-olefin newsletter and provides consultation to clients on alpha-olefins. Since joining CAHA in 1980, she has also been the project leader for numerous proprietary projects such as an analysis of the growth prospects for 22 U.S. surfactant ethoxylators. Ms. Bradshaw has a B.A. from Finch College and an economics and management certificate from Manhattanville College. She is an active member of CDMA.

Dr. Darrel L. Muck, Senior Research Associate,

authored our multiclient studies GLUCOSAMIDES: THE CHALLENGE OF A NEW SUGAR-BASED SURFACTANT, 1993-1998 and DEVELOPMENTS IN DETERGENT BUILDER SYSTEMS - NORTH AMERICAN REPORT TO 2005. He has also contributed sections of CAHA's studies SURFACTANTS FOR CONSUMER PRODUCTS - NORTH AMERICAN FORECAST TO 2010, INDUSTRIAL APPLICATIONS OF SURFACTANTS - NORTH AMERICAN FORECAST TO 2010, SURFACTANTS FOR EMERGING MARKETS IN ASIA/PACIFIC, 1995-2010, SURFACTANTS FOR CONSUMER PRODUCTS - NORTH AMERICAN FORECAST TO 2008 and OPPORTUNITIES IN PERFORMANCE SURFACTANTS IN THE U.S. Dr. Muck has over 30 years experience in the chemical industry and was most recently Director of Commercial Development, FMC Chemicals Division. He holds B.S./ M.S. degrees in chemistry from Wichita State University and a Ph.D. in Organic Chemistry from the University of Florida. He is a member of ACS and AOCS.

H. James Bigalow, Senior Research Associate,

authored the Paper and Textiles end use sections of our multiclient studies INDUSTRIAL APPLICATIONS OF SURFACTANTS - NORTH AMERICAN FORECAST TO 2010 and SURFACTANTS FOR EMERGING MARKETS IN ASIA/PACIFIC, 1995-2010, contributed to SURFACTANTS FOR CONSUMER PRODUCTS - NORTH AMERICAN FORECAST TO 2010, DETERGENT ALKYLATES - WORLD MARKETS, 1995-2010 and SURFACTANTS FOR CONSUMER PRODUCTS - NORTH AMERICAN FORECAST TO 2008 and has worked on proprietary detergent and surfactant studies. Mr. Bigalow has over 20 years experience as a senior marketing research executive in the chemical industry. He has conducted successful business analysis projects which have included financial evaluations of businesses and acquisition candidates, identifying current and future markets for new and existing products, and product development and

usage. Additional experience has included economic and sales forecasting, strategic planning, proprietary market research projects, benchmarking, and product safety. He is a member of the CDMA, the Society of Competitive Intelligence Professionals (SCIP), ACS and the Chemical Marketing and Economics Division of the ACS. Mr. Bigalow holds an M.S. Industrial Administration, Krannert School of Management, Purdue University and a B.S. degree in Chemistry, Denison University.

Holly Burnside, Research Associate

authored the Personal Care Chapter of SURFACTANTS FOR CONSUMER PRODUCTS - NORTH AMERICAN FORECAST TO 2010. She also authored the linear alkylbenzene end use section of our multiclient study, NORMAL PARAFFINS - WORLD MARKETS, 2000-2010, and authors portions of our bimonthly LAB Market Newsletter. She has also contributed to a proprietary study of global surfactant intercompetition. Ms. Burnside graduated with honors from Union College with a B.S. degree in Physics and a minor in Mathematics.

Maria Pavlakos, Research Associate

authored the Household Detergent section of SURFACTANTS FOR CONSUMER PRODUCTS - NORTH AMERICAN FORECAST TO 2010. She has also contributed to a proprietary study of bleaching agents. Her previous experience includes surfactant applications work with Huntsman Surface Sciences in Australia. Ms. Pavlakos graduated with honors from University of Melbourne, Australia with a B.S. degree in Chemistry and a certificate of Marketing from New York University, New York.

COST AND DELIVERY SCHEDULE

The price of the study, *Surfactants For Consumer Products - North American Forecast to 2010* is \$20,500. Full payment is due upon receipt of our invoice and three (3) copies of the report. Additional copies are available at \$275.00 each plus shipping.

HOW TO SUBSCRIBE

To subscribe to the study please complete contact CAHA below.

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