

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.

CONTENTS

Introduction	1
Description of Study	2
Table of Contents	5
Sample Tables	24
Qualifications & Personnel	29
Cost and Delivery	32
Contract	33

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.

TABLE OF CONTENTS

	<u>Page</u>
PREFACE	iii
EXECUTIVE SUMMARY	iv
TABLE OF CONTENTS	xxiv
List of Tables	xxxiv
List of Figures	xlii
I. MARKET ENVIRONMENT	I-1 - I-22
Free Trade Agreements	I-1
NAFTA	I-1
Chile	I-3
Other U.S. Trade Agreements and Initiatives	I-3
Free Trade Area of the Americas (FTAA)	I-4
Economic Outlook and Forecast	I-6
United States	I-6
Canada	I-10
Mexico	I-15
Petrochemical Industry	I-19
II. SURFACTANT INTERMEDIATES	II-1 - II-49
Introduction	II-1
Impact of Global Developments on North American Markets	II-3
Detergent Alcohols	II-3
Linear Alkylbenzene	II-4
Ethylene Oxide	II-4
Pricing	II-5
Increased Competition and Its Impact	II-5
Detergent Alcohol	II-8
Technology	II-8
Oleochemical Alcohol Manufacturing Processes	II-9
Petroleum-Based Alcohol Manufacturing Processes	II-15
Products	II-18
Producers and Capacities	II-18
BP	II-19
Sasol	II-20
Shell Chemical	II-20
Cognis	II-22
Procter & Gamble	II-22
Production	II-22
End Use Markets	II-23
Market Trends and Issues	II-23
Prices	II-26
Canada	II-27
Linear Alkylbenzene	II-28
Technology	II-28
Starting Materials and Processes	II-29

Table of Contents (continued)

	<u>Page</u>
LAB Compositions	II-31
Producers and Capacities	II-33
Huntsman	II-33
Petresa Canada	II-33
Sasol North America	II-34
Production	II-35
End Use Markets	II-36
Market Trends and Issues	II-36
Prices	II-39
Canada	II-39
Mexico	II-40
Alkyldimethylamine	II-41
Technology	II-41
Producers and Capacities	II-43
Akzo Nobel	II-44
Albemarle	II-44
Lonza	II-46
Procter & Gamble	II-46
Production	II-46
End Use Markets	II-47
Market Trends and Issues	II-48
Prices	II-48
Canada	II-49
Mexico	II-49
III. MAJOR ORGANIC SURFACTANTS	III-1 - III-66
Introduction	III-1
Surfactant Supply Structure	III-3
Product Value Chain	III-3
The Development of Retail as a Driving Force	III-5
Performance Issues	III-7
Sulfation/Sulfonation	III-9
Ethoxylation	III-15
Surfactant Supplier Integration	III-22
Alcohol Ethoxylate	III-25
Technology	III-25
Production	III-25
End Use Markets	III-27
Utilization	III-28
Demand Forecast to 2010	III-30
Canada	III-32
Mexico	III-33
Alcohol Ethoxysulfate	III-34
Technology	III-34
Production	III-34
End Use Markets	III-35
Utilization	III-36
Demand Forecast to 2010	III-37
Canada	III-39
Mexico	III-40
Alcohol Sulfate	III-42

Table of Contents (continued)

	<u>Page</u>
Technology	III-42
Production	III-42
End Use Markets	III-43
Utilization	III-44
Demand Forecast to 2010	III-45
Canada	III-47
Mexico	III-47
Alkanolamides	III-49
Technology	III-49
Producers	III-50
End Use Markets	III-52
Demand Forecast to 2010	III-52
Canada	III-54
Alkylphenol Ethoxylates	III-55
Technology	III-55
Production	III-55
Utilization	III-56
Consumption by End Use	III-57
Demand Forecast to 2010	III-57
Canada	III-59
Mexico	III-59
Linear Alkylbenzene Sulfonates	III-61
Technology	III-61
Production	III-61
End Use Markets	III-62
Utilization	III-64
Demand Forecast to 2010	III-64
Canada	III-65
Mexico	III-66
IV. PERFORMANCE SURFACTANT OVERVIEW	IV-1 - IV-33
Alkylpolyglycosides	IV-2
Technology	IV-2
Producers	IV-4
End Use Markets	IV-5
Household	IV-5
Personal Care	IV-6
Demand Forecast to 2010	IV-6
Amine Oxides	IV-8
Technology	IV-8
Producers	IV-8
End Use Markets	IV-9
Demand Forecast to 2010	IV-10
Canada	IV-12
Betaines	IV-13
Technology	IV-13
Producers	IV-14
End Use Markets	IV-16
Demand Forecast to 2010	IV-17
Canada	IV-19
EO/PO Block Copolymers	IV-20

Table of Contents (continued)

	<u>Page</u>
Technology	IV-20
Producers	IV-21
End Use Markets	IV-24
Demand Forecast to 2010	IV-25
Canada	IV-25
Quaternary Ammonium Compounds	IV-26
Technology	IV-26
Producers	IV-29
End Use Markets	IV-30
Demand Forecast to 2010	IV-32
Canada	IV-33
V. HOUSEHOLD PRODUCTS	V-1 - V-270
Market Structure and Trends	V-8
Household Product Producers	V-8
Household Surfactant and Intermediate Suppliers	V-16
Design Changes in Washing Machines	V-23
Energy Conservation Standards	V-23
Dishwashers	V-24
Clothes Washers	V-24
Clothes Washer Trends	V-26
Retailer Practices	V-31
Heavy Duty Detergents	V-35
Introduction	V-35
Heavy Duty Detergent Market Overview	V-37
Major Trends	V-39
Growth of Heavy Duty Liquids	V-39
The Failure of Laundry Tablets	V-40
Consolidation	V-41
Proliferation of Value/Price Brands	V-43
Changes in Distribution Channels to Market	V-45
Product Package Size and Detergent Dose Levels	V-46
Collaborative Work	V-47
Formulation Trends and Technology	V-48
Convenience	V-48
Fabric Care	V-49
Detergents Designed for New Washing Machines	V-50
Laundry Detergent Tablets	V-51
Product Benefits and Brand Extensions	V-53
New Technology	V-56
Major Producers	V-57
Household Detergent Economics	V-60
Estimated Cost of Formulations	V-63
Heavy Duty Powders	V-63
Heavy Duty Liquids	V-67
Light Duty Liquids	V-71
Supply Chain Elements	V-73
Heavy Duty Liquids	V-77
Consumption and Trends	V-77
Historical Growth of Liquids	V-78

Table of Contents (continued)

	<u>Page</u>
Current Trends	V-81
Fabric Care	V-81
Bleach Systems for Heavy Duty Liquid Detergents	V-82
Liquid Detergents for High-Efficiency Washing Machines	V-83
Future Trends	V-84
HDL Outlook	V-85
Market Structure	V-85
End Use Technology	V-88
Product Forms	V-88
Formulation Types	V-89
Supplemental Ingredients	V-92
Formulary	V-94
Surfactant Technology	V-95
Nonionics	V-95
Anionics	V-97
Cationics	V-98
Surfactant Consumption	V-99
Linear Alkylbenzene Sulfonates	V-100
Alcohol Ethoxysulfates	V-101
Alcohol Ethoxylates	V-102
Alkylphenol Ethoxylates	V-103
Glucosamides	V-104
Amine Oxides	V-104
Soap	V-104
Alkylphenol Ethoxysulfates	V-105
Methyl Ester Sulfonates	V-105
Canada	V-105
Consumption and Trends	V-105
Market Structure	V-106
End Use Technology	V-107
Surfactant Consumption	V-107
Mexico	V-108
Consumption and Trends	V-108
Market Structure	V-109
End Use and Surfactant Technology	V-110
Heavy Duty Powders	V-111
Consumption and Trends	V-111
Major Trends	V-112
Market Structure	V-116
End Use Technology	V-119
Builder Systems for HDPs and Tablets	V-119
HDP and Tablet Systems for High Efficiency Machines	V-120
Fabric Care	V-120
Enzyme Developments	V-121
Heavy Duty Powders with Increased Solubility	V-122
Formulary	V-122
Surfactant Technology	V-124
Anionics	V-125
Nonionics	V-127
Surfactant Consumption	V-128

Table of Contents (continued)

	<u>Page</u>
Linear Alkylbenzene Sulfonates	V-130
Alcohol Sulfates	V-130
Alcohol Ethoxysulfates	V-131
Alcohol Ethoxylates	V-131
Alkylphenol Ethoxylates	V-132
Soap	V-132
Methyl Ester Sulfonates	V-133
Canada	V-133
Consumption and Trends	V-133
Market Structure	V-135
Laundry Detergent Tablets	V-136
End Use and Surfactant Technology	V-137
Surfactant Consumption	V-138
Mexico	V-139
Consumption and Trends	V-139
Market Structure	V-141
Compacts	V-143
End Use and Surfactant Technology	V-144
Surfactant Consumption	V-146
Light Duty Liquids	V-148
Introduction	V-148
Consumption and Trends	V-148
Formulating Trends	V-150
Brand Evolution	V-153
Market Structure	V-153
End Use and Surfactant Technology	V-155
Formulating Practices	V-157
Surfactant Consumption	V-160
Linear Alkylbenzene Sulfonates	V-160
Alcohol Ethoxysulfates	V-161
Alcohol Sulfates	V-161
Alcohol Ethoxylates	V-161
Alkanolamides/Amine Oxides/Betaines	V-162
Alkylpolyglycosides	V-164
Glucosamides	V-164
Methyl Ester Sulfonates	V-165
Paraffin Sulfonates	V-165
Alpha-Olefin Sulfonates	V-166
Canada	V-166
Consumption and Trends	V-166
Market Structure	V-167
End Use and Surfactant Technology	V-168
Surfactant Consumption	V-169
Mexico	V-170
Consumption and Trends	V-170
Market Structure	V-171
Surfactant Consumption	V-172
Fine Fabric Detergents	V-174
Consumption and Trends	V-175
Market Structure	V-176
End Use and Surfactant Technology	V-178

Table of Contents (continued)

	<u>Page</u>
Surfactant Consumption	V-179
Canada	V-180
Mexico	V-180
Fabric Softeners	V-181
Consumption and Trends	V-182
Market Structure	V-185
End Use Technology	V-192
Surfactant Technology	V-194
Dihydrogenated Tallow Dimethyl Ammonium Chloride	V-194
DETA-Based Surfactants	V-195
Methyl Diethanolamine Esterquat	V-196
Triethanolamine Esterquat	V-197
Dimethyl Aminopropane-diol Esterquat	V-199
Amido-Esterquat	V-199
Formulation Requirements	V-200
Surfactant Consumption	V-202
Canada	V-204
Mexico	V-206
Prewash Products	V-208
Consumption and Trends	V-208
Market Structure	V-210
End Use and Surfactant Technology	V-212
Surfactant Consumption	V-212
Canada	V-213
Mexico	V-213
Bleaches	V-215
Consumption and Trends	V-216
Market Structure	V-218
End Use and Surfactant Technology	V-224
Surfactant Consumption	V-227
Canada	V-228
Hard Surface Cleaners	V-230
Consumption and Trends	V-231
Market Structure	V-238
End Use and Surfactant Technology	V-244
Surfactant Consumption	V-247
Automatic Dishwashing Detergents	V-250
Consumption and Trends	V-252
Market Structure	V-255
End Use and Surfactant Technology	V-259
Powders	V-260
Liquids	V-265
Tablets	V-266
Liquid Tablets	V-267
Surfactant Consumption	V-267
Canada	V-269
Mexico	V-270
VI. PERSONAL CARE PRODUCTS	VI-1 - VI-143
Overview	VI-1
Market Structure and Trends	VI-3

Table of Contents (continued)

	<u>Page</u>
Demographics	VI-5
Technological Advances	VI-8
Regulatory Issues	VI-9
Personal Care Companies	VI-10
Surfactant Consumption	VI-19
Surfactant Suppliers	VI-23
Canada	VI-26
Regulatory Issues	VI-27
Personal Care Companies	VI-28
Surfactant Consumption	VI-29
Mexico	VI-30
Hair Care	VI-34
Shampoo	VI-35
Consumption and Trends	VI-35
Market Structure	VI-39
Recent Market Activity	VI-41
End Use Technology	VI-43
Shampoo Additives	VI-46
Surfactant Technology	VI-48
Anionics	VI-49
Amphoterics	VI-50
Cationics	VI-51
Nonionics	VI-51
Surfactant Consumption	VI-56
Canada	VI-57
Mexico	VI-58
Hair Conditioners	VI-62
Consumption and Trends	VI-62
Market Structure	VI-62
End Use and Surfactant Technology	VI-63
Surfactant Consumption	VI-66
Canada	VI-67
Mexico	VI-68
Hair Styling Aids	VI-71
Consumption and Trends	VI-71
Market Structure	VI-72
End Use and Surfactant Technology	VI-73
Gel	VI-73
Mousse	VI-74
Surfactant Consumption	VI-75
Canada	VI-76
Mexico	VI-76
Skin Creams and Lotions	VI-77
Consumption and Trends	VI-77
Facial Cleansers and Moisturizers	VI-78
Hand and Body Lotions	VI-80
Sun Care	VI-81
Market Structure	VI-82
End Use and Surfactant Technology	VI-85
Facial Cleansers	VI-85
Facial Moisturizers and Hand and Body Lotions	VI-86

Table of Contents (continued)

	<u>Page</u>
Sun Care	VI-87
Surfactant Consumption	VI-88
Canada	VI-89
Mexico	VI-91
Bath and Shower Products	VI-94
Consumption and Trends	VI-94
Market Structure	VI-95
End Use and Surfactant Technology	VI-98
Body Wash	VI-98
Bubble Bath	VI-99
Bath Oil	VI-100
Surfactant Consumption	VI-101
Canada	VI-102
Toilet Soap Bars	VI-104
Consumption and Trends	VI-104
Market Structure	VI-105
End Use and Surfactant Technology	VI-106
Natural Soap Bars	VI-106
Synthetic Detergent Bars and Combination Bars	VI-107
Translucent/Transparent Soap Bars	VI-108
Surfactant Consumption	VI-109
Soap	VI-110
Isethionates	VI-110
Other Surfactants	VI-111
Canada	VI-111
Mexico	VI-112
Liquid Soap	VI-115
Consumption and Trends	VI-115
Market Structure	VI-117
End Use and Surfactant Technology	VI-118
Surfactant Consumption	VI-118
Canada	VI-119
Toothpaste	VI-121
Consumption and Trends	VI-121
Market Structure	VI-122
End Use and Surfactant Technology	VI-123
Surfactant Consumption	VI-127
Canada	VI-127
Mexico	VI-128
Shaving Preparations	VI-130
Consumption and Trends	VI-130
Market Structure	VI-131
End Use Technology	VI-132
Gels and Foams	VI-132
Shaving Soap	VI-133
Surfactant Consumption	VI-133
Canada	VI-134
Mexico	VI-135
Miscellaneous Personal Care Products	VI-136
Antiperspirants/Deodorants	VI-136
Mouthwashes	VI-138

Table of Contents (continued)

	<u>Page</u>
	VI-140
	VI-141
VII. TABULATIONS	VII-1 - VII-28
VIII. APPENDICES	VIII-1 - VIII-6
List of Abbreviations	VIII-1
List of Contacts	VIII-5

LIST OF TABLES

<u>Table</u>	<u>Page</u>
1 North American Consumer Products Summary, 2002	iv
2 U.S. - Consumer Products and Surfactants, and Average Annual Growth Rates, 2002-2010	v
3 U.S. - Consumer Product Surfactant Consumption, 1998-2010	v
4 North America - Household Products Summary, 2002	xii
5 U.S. - Consumption of Household Products by End Use, 1998-2010	xiii
6 North America - Personal Care Summary, 2002	xx
7 U.S. - Consumption of Personal Care Products, 1998-2010	xx
I-1 Chemical Trade within NAFTA, 1996-2001	I-2
I-2 U.S. Population, 1992-2002	I-7
I-3 U.S. Population Trends, 2001-2010	I-7
I-4 U.S. GDP Growth, 1996-2002	I-8
I-5 U.S. - GDP and CPI, 1992-2001	I-9
I-6 Personal Disposable Income and Personal Consumption Expenditures, 1992-2002	I-10
I-7 Exchange Rate - U.S.-Canada, 1992-2002	I-11
I-8 Canada Population Trends, 1992-2011	I-12
I-9 Canada - GDP, Personal Disposable Income and Personal Expenditures For Consumer Goods, 1992-2001	I-13
I-10 Canadian Trade Statistics, 1992-2002	I-15
I-11 Exchange Rate - Mexican Peso vs. U.S. Dollar, 1992-2002	I-16
I-12 Mexico - CPI and Industrial Production Index, 1992-2001	I-17
I-13 Mexico - Population Trends, 1992-2010	I-18
I-14 Mexico - GDP and Personal Expenditures, 1992-2001	I-19
I-15 Mexico - Imports and Exports, 1992-1999	I-22
II-1 Worldwide Alcohol Capacity Changes, 2000-2002	II- 4
II-2 Typical Alcohol Composition From Whole Coconut Methyl Esters	II-14
II-3 U.S. - Detergent-Range Alcohol (C ₁₂₊) Producers and Capacities, 2002	II-19
II-4 U.S. - Shell Chemical Co. Detergent Alcohol Capacity, 1980-2002	II-20
II-5 U.S. - Primary Alcohols Detergent-Range (C ₁₂₊) Balance, 1998-2002	II-23
II-6 U.S. - Detergent-Range Alcohols Average List Price History, 1982-2002	II-26
II-7 Typical Linear Alkylbenzene Compositions	II-32
II-8 North American LAB Capacity, 2002	II-35
II-9 North America - Linear Alkylbenzene Production, 1996-2002	II-36
II-10 North America - Linear Alkylbenzene Consumption, 2002	II-36
II-11 U.S. and Canada - Exports of Linear Alkylbenzene to Mexico, 1999-2002	II-40
II-12 North America - Alkyldimethylamine Producers and Capacities, 2002	II-44
II-13 North America - Alkyldimethylamine Production, 2000-2002	II-47
III-1 U.S. - Household and Personal Care Demand For Major Organic Surfactants, 1998-2010	III-2
III-2 Comparison of Detergency by Surfactant	III-9
III-3 North America - Sulfators/Sulfonators and Capacities, 2002	III-11
III-4 United States - Sulfators/Sulfonators and Capacity, 2002	III-12
III-5 Canada - Sulfators/Sulfonators and Capacity, 2002	III-14
III-6 Mexico - Sulfators/Sulfonators and Capacity, 2002	III-15

List of Tables (continued)

<u>Table</u>	<u>Page</u>
III-7 North America - Ethoxylators and Capacities, 2002	III-17
III-8 United States - Ethoxylators and Capacities, 2002	III-18
III-9 Canada - Ethoxylators and Capacities, 2002	III-20
III-10 Mexico - Ethoxylators and Capacities, 2002	III-22
III-11 U.S. - Selected Household and Personal Care Surfactant Supplier Integration Matrix, 2002	III-24
III-12 U.S. - Alcohol Ethoxylate Producers, 2002	III-26
III-13 U.S. - Alcohol Ethoxylate Consumption in Household and Personal Care End Use Markets, 2002	III-27
III-14 U.S. - Consumption of Alcohol Ethoxylates in Household and Personal Care Products, 1998-2010	III-30
III-15 Canada - Alcohol Ethoxylate Producers, 2002	III-32
III-16 Mexico - Alcohol Ethoxylate Producers, 2002	III-33
III-17 U.S. - Alcohol Ethoxysulfate Producers, 2002	III-35
III-18 U.S. - Alcohol Ethoxysulfate Consumption in Household and Personal Care End Use Markets, 2002	III-36
III-19 U.S. - Consumption of Alcohol Ethoxysulfates in Household and Personal Care Products, 1998-2010	III-38
III-20 Canada - Alcohol Ethoxysulfate Producers, 2002	III-40
III-21 Mexico - Alcohol Ethoxysulfate Producers, 2002	III-41
III-22 U.S. - Alcohol Sulfate Producers, 2002	III-42
III-23 U.S. Alcohol Sulfate Consumption in Household and Personal Care End Use Markets, 2002	III-44
III-24 U.S. - Consumption of Alcohol Sulfate in Household and Personal Care Products, 1998-2010	III-46
III-25 Canada - Alcohol Sulfate Producers, 2002	III-47
III-26 Mexico - Alcohol Sulfate Producers, 2002	III-48
III-27 U.S. - Alkanolamide Suppliers, 2002	III-51
III-28 U.S. - Consumption of Alkanolamides in Household and Personal Care Products, 1998-2010	III-53
III-29 U.S. - Selected Alkylphenol Ethoxylate Producers, 2002	III-56
III-30 U.S. - Consumption of Alkylphenol Ethoxylates in Household Products, 1998-2010	III-58
III-31 Canada - Alkylphenol Ethoxylate Producers, 2002	III-59
III-32 Mexico - Alkylphenol Ethoxylate Producers, 2002	III-59
III-33 U.S. - Linear Alkylbenzene Sulfonate Producers, 2002	III-61
III-34 U.S. - Linear Alkylbenzene Sulfonate Consumption in Household and Personal Care End Markets, 2002	III-63
III-35 U.S. - Consumption of Linear Alkylbenzene Sulfonate in Household and Personal Care Products, 1998-2010	III-64
III-36 Canada - Linear Alkylbenzene Sulfonate Producers, 2002	III-66
III-37 Mexico - Linear Alkylbenzene Sulfonate Producers, 2002	III-66
IV-1 U.S. - Alkylpolyglycoside Producers and Capacities, 2002	IV-5
IV-2 U.S. - Consumption of Alkylpolyglycosides in Household and Personal Care Products, 1998-2010	IV-7
IV-3 U.S. - Amine Oxide Producers, 2002	IV-8
IV-4 U.S. - Consumption of Amine Oxides in Household Products, 1998-2010	IV-11
IV-5 U.S. - Selected Betaine Producers, 2002	IV-15
IV-6 U.S. - Consumption of Betaines in Household and Personal Care Products, 1998-2010	IV-18
IV-7 U.S. - Major EO/PO Block Copolymer Producers and Products, 2002	IV-22

List of Tables (continued)

<u>Table</u>	<u>Page</u>
IV-8 U.S. - Consumption of EO/PO Block Copolymers in Household and Personal Care Products, 1998-2010	IV-25
IV-9 U.S. - Major Producers of Quaternary Surfactants, 2002	IV-29
IV-10 U.S. - Consumption of Quaternary Ammonium Compounds in Household and Personal Care Products, 1998-2010	IV-32
V-1 U.S. - Consumption of Household Products by End Use, 1998-2010	V-3
V-2 U.S. - Household Cleaning Product Retail Sales by Segment, 2002	V-4
V-3 U.S. - Surfactant Consumption in Household Products, 1998-2010	V-5
V-4 U.S. - Surfactant Consumption in Household Products by Major Surfactant and By End Use, 1998-2010	V-6
V-5 Major Household Producers World Sales and Growth, 2001	V-9
V-6 Mergers and Acquisitions in the Household Products Industry, 1997-2002	V-10
V-7 Procter & Gamble's Detergent Raw Material Options	V-18
V-8 U.S. - Selected Household Surfactant and Surfactant Intermediate Producers, Sales and Product Line, 2002	V-20
V-9 U.S. - Energy Standards for Dishwashers and Clothes Washers, May 1994	V-23
V-10 U.S. - Energy Levels Analyzed For Top-Loading Clothes Washers	V-25
V-11 Consortium for Energy Efficiency (CEE) System of Ranking Washers	V-27
V-12 Consumer Report Ratings with CEE Tier Rankings	V-28
V-13 U.S. - Conversion to Energy Efficient Laundry Machines, 1998-2010	V-30
V-14 U.S. - Private Label Products Dollar Share by Product for Food, Drug and Mass Merchandisers, 2000	V-34
V-15 Heavy Duty Detergent Categories	V-37
V-16 U.S. - Consumption of Heavy Duty Detergents, 1998-2010	V-37
V-17 U.S. - Heavy Duty Detergent Market Shares by Volume and Washloads, 1998-2010	V-38
V-18 U.S. - Heavy Duty Detergent Volume Market Shares by Producer, 1996 and 2001	V-58
V-19 U.S. - Examples of Detergent Prices, 2001	V-61
V-20 U.S. - Formulation Costs for Selected Brands of Heavy Duty Powders, 2002	V-65
V-21 U.S. - Formulation Costs for Selected Brands of Heavy Duty Liquids, 2002	V-69
V-22 U.S. - Formulation Costs for Selected Brands of Light Duty Liquids, 2002	V-72
V-23 U.S. - Consumption of Heavy Duty Liquid Detergents, 1998-2010	V-78
V-24 U.S. - Heavy Duty Liquid Product Evolution, 1957-2002	V-79
V-25 U.S. - Consumption of Heavy Duty Liquid and Surfactants for High-Efficiency Washing Machines, 2002-2010	V-85
V-26 U.S. - Heavy Duty Liquid Market Shares, 2001	V-87
V-27 U.S. - Ultra Heavy Duty Liquid Formulations, 2002	V-94
V-28 U.S. - Major Surfactant Consumption in Heavy Duty Liquids by Detergent Producer, 2002	V-99
V-29 U.S. - Surfactant Consumption in Heavy Duty Liquids, 1998-2010	V-100
V-30 Canada - Consumption of Heavy Duty Liquids, 1998-2010	V-106
V-31 Canada - Surfactant Consumption in Heavy Duty Liquids, 1998-2010	V-108
V-32 Mexico - Consumption of Heavy Duty Liquids, 1998-2010	V-109
V-33 Mexico - Heavy Duty Liquid Detergent Volume Market Shares, 2001	V-110
V-34 Mexico - Surfactant Consumption in Heavy Duty Liquids, 1998-2010	V-110
V-35 U.S. - Consumption of Heavy Duty Powders and Tablets, 1998-2010	V-111
V-36 U.S. - Consumption of Heavy Duty Powders and Tablets and Surfactants For High-Efficiency Washing Machines, 2002-2010	V-116
V-37 U.S. - Heavy Duty Powder and Tablet Market Shares, 2001	V-118
V-38 U.S. - Heavy Duty Powder Formulations, 2002	V-122

List of Tables (continued)

<u>Table</u>	<u>Page</u>
V-39 U.S. - Laundry Tablet Formulations, 2002	V-124
V-40 U.S. - Major Surfactant Consumption in Heavy Duty Powders and Tablets by Detergent Producer, 2002	V-129
V-41 U.S. - Surfactant Consumption in Heavy Duty Powders and Tablets, 1998-2010	V-130
V-42 Canada - Consumption of Heavy Duty Powders, 1998-2010	V-134
V-43 Canada - Major Heavy Duty Powder Brands Volume Market Share, 2001	V-136
V-44 Canada - Consumption of Laundry Tablets, 1998-2010	V-137
V-45 Canada - Typical Heavy Duty Powder Formulation Ranges	V-137
V-46 Canada - Surfactant Consumption in Heavy Duty Powders and Tablets, 1998-2010	V-139
V-47 Mexico - Consumption of Heavy Duty Powders, 1998-2010	V-140
V-48 Mexico - Heavy Duty Powder Producer and Brand Market Shares, 2001	V-143
V-49 Mexico - Typical Heavy Duty Powder Formulation Ranges	V-145
V-50 Mexico - Surfactant Consumption in Heavy Duty Powder Detergents, 1998-2010	V-146
V-51 U.S. - Consumption of Light Duty Liquids, 1998-2010	V-149
V-52 U.S. - Ultra Light Duty Liquid Volume Sales and Market Shares, 2001	V-150
V-53 U.S. - Liquid Duty Liquid Value and Volume Market Shares, 2001	V-154
V-54 U.S. - Typical Light Duty Liquid Surfactant Levels, 2001	V-159
V-55 U.S.- Surfactant Consumption in Light Duty Liquids, 1998-2010	V-160
V-56 Canada - Consumption of Light Duty Liquids, 1998-2010	V-167
V-57 Canada - Major Light Duty Liquid Brands and Volume Market Share, 2001	V-168
V-58 Canada - Surfactant Consumption in Light Duty Liquids, 1998-2010	V-169
V-59 Mexico - Dishwashing Detergent Consumption, 1998-2010	V-171
V-60 Mexico - Surfactant Consumption in Dish Detergents, 1998-2010	V-173
V-61 U.S. - Consumption of Fine Fabric Detergents, 1998-2010	V-176
V-62 U.S. - Fine Fabric Detergent Market Shares, 2001	V-178
V-63 U.S. - Surfactant Consumption in Fine Fabric Detergents, 1998-2010	V-179
V-64 Mexico - Consumption of Fine Fabric Detergents, 1998-2010	V-180
V-65 U.S. - Consumption of Fabric Softeners by Value, 1996 and 2002	V-183
V-66 U.S. - Consumption of Fabric Softeners by Volume, 1998-2010	V-185
V-67 U.S. - Fabric Softener Liquids and Sheets Market Shares, 2001	V-187
V-68 U.S. - Household Fabric Softeners - Cost Per Use Comparison, 2001	V-190
V-69 Properties of Amidoamine Quaternary Softeners	V-196
V-70 Properties of Imidazoline Quaternary Softeners	V-196
V-71 Properties of Ester Quaternary Softeners	V-198
V-72 U.S. - Surfactant Consumption in Liquid and Sheet Fabric Softeners, 1998-2010	V-203
V-73 U.S. - Surfactant Consumption in All Fabric Softeners, 1998-2010	V-204
V-74 Canada - Consumption of Fabric Softeners, 1998-2010	V-205
V-75 Canada - Surfactant Consumption in Fabric Softeners, 1998-2010	V-205
V-76 Mexico - Consumption of Fabric Softeners, 1998-2010	V-207
V-77 Mexico - Surfactant Consumption in Fabric Softeners, 1998-2010	V-207
V-78 U.S. - Consumption of Prewash Products, 1998-2010	V-210
V-79 U.S. - Prewash Products Value and Volume Market Shares, 2001	V-211
V-80 U.S. - Surfactant Consumption in Prewash Products, 1998-2010	V-213
V-81 Mexico - Consumption of Prewash Products, 1998-2010	V-214
V-82 U.S. - Consumption of Bleach, 1998-2010	V-218
V-83 U.S. - Chlorine Liquid Bleach Market Shares, 2001	V-220
V-84 U.S. - Non-Chlorine Bleach Market Shares, 2001	V-221
V-85 Typical Components of a Dry Bleach	V-225
V-86 U.S. - Surfactant Consumption in Chlorine and Non-Chlorine (All-Fabric) Dry and Liquid Bleaches, 1998-2010	V-228
V-87 Canada - Consumption of All-Fabric Dry and Liquid Bleach, 1998-2010	V-228

List of Tables (continued)

<u>Table</u>	<u>Page</u>	
V-88	Canada - Surfactant Consumption in Dry and Liquid All-Fabric Bleaches, 1998-2010	V-229
V-89	U.S. - Consumption of Hard Surface Cleaners, 1998-2010	V-238
V-90	U.S. - Hard Surface Cleaner Producer Market Shares, 2001	V-239
V-91	U.S. - Hard Surface Cleaners Value Market Shares, 2001	V-243
V-92	U.S. - Surfactant Consumption in Hard Surface Cleaners, 1998-2010	V-248
V-93	U.S. - Households with Dishwashers, 1960-2001	V-251
V-94	U.S. - Energy Standards for Dishwashers, May 1994	V-252
V-95	U.S. - Consumption of Autodish Detergents, 1998-2010	V-254
V-96	U.S. - Autodish Detergent Market Shares, 2001	V-257
V-97	U.S. - Typical Autodish Powder Systems	V-261
V-98	U.S. - Typical Household Powdered Autodish Detergent Formulation Ranges	V-262
V-99	Typical Autodish Alternative Systems	V-263
V-100	BP-LAA Formulations in Autodish Powders and Rinse Aids	V-264
V-101	U.S. - Typical Household Gel Autodish Detergent Formulation Ranges	V-266
V-102	U.S. - Surfactant Consumption in Autodish Detergents, 1998-2010	V-269
V-103	Canada - Surfactant Consumption in Autodish Detergents, 1998-2010	V-270
V-104	Mexico - Surfactant Consumption in Autodish Detergents, 1998-2010	V-270
VI-1	U.S. - Consumption of Personal Care Products, 1998-2010	VI-1
VI-2	U.S. - Personal Care Market Value by Segment, 2002	VI-2
VI-3	U.S. - Population by Age Group, 2000, 2005 and 2010	VI-5
VI-4	U.S. - Population by Segment	VI-7
VI-5	U.S. - Personal Care Product Sales by Producer, 2001	VI-11
VI-6	Mergers and Acquisitions Affecting the Personal Care Industry, 1998-2003	VI-12
VI-7	U.S. - Personal Care Company Product Offerings, 2002	VI-15
VI-8	U.S. - Select Direct Sales Companies and Some of Their Products	VI-16
VI-9	U.S. - Personal Care Product Sales by Selected Retail Producers, 2001	VI-18
VI-10	U.S. - Estimated Private Label Dollar and Volume Market Shares in Personal Care Market Segments, 2001	VI-19
VI-11	U.S. - Surfactant Consumption in Personal Care Products by End Use, 1998-2010	VI-20
VI-12	U.S. - Surfactant Consumption in Personal Care Products by Surfactant, 1998-2010	VI-21
VI-13	U.S. - List Prices for Surfactants Used in Personal Care Products, 2002	VI-23
VI-14	U.S. - Estimated Merchant Sales to the Personal Care Industry by Surfactant Supplier, 2002	VI-25
VI-15	U.S. - Personal Care Major Surfactant Producers, 2002	VI-26
VI-16	Canada - Consumption of Personal Care Products, 1998-2010	VI-27
VI-17	Canada - Major Personal Care Manufacturers, 2001	VI-29
VI-18	Canada - Surfactant Consumption in Personal Care Products by End Use, 1998-2010	VI-30
VI-19	U.S., Canada and Mexico - Comparative Demographic Statistics, 2001	VI-31
VI-20	Mexico - Consumption of Personal Care Products, 1998-2010	VI-32
VI-21	Mexico - Surfactant Consumption in Personal Care Products by End Use, 1998-2010	VI-33
VI-22	U.S. - Consumption of Hair Care Products, 1998-2010	VI-34
VI-23	U.S. - Consumption of Shampoo, 1998-2010	VI-35
VI-24	U.S. - Population by Race as Percentage of Total, 2002	VI-38
VI-25	U.S. - Shampoo Dollar Shares by Distribution Channel, 2002	VI-39
VI-26	Selected Salon/Prestige Shampoo Brands	VI-40
VI-27	U.S. - Shampoo Producer and Brand Market Shares, 2001	VI-40
VI-28	U.S. - Shampoo Market Activity, 1998-2002	VI-42
VI-29	Estimated Clear Shampoo Formulation Ranges	VI-44
VI-30	Estimated Lotion Shampoo Formulation Ranges	VI-44
VI-31	Estimated Paste Shampoo Formulation Ranges	VI-45

List of Tables (continued)

<u>Table</u>		<u>Page</u>
VI-32	Estimated Gel Shampoo Formulation Ranges	VI-45
VI-33	Biological Additives Found in Shampoos	VI-48
VI-34	U.S. - Shampoo Ingredient Trends, 2001	VI-53
VI-35	U.S. - Surfactant Consumption in Shampoo, 1998-2010	VI-56
VI-36	Canada - Consumption of Shampoo, 1998-2010	VI-57
VI-37	Canada - Surfactant Consumption in Shampoo, 1998-2010	VI-58
VI-38	Mexico - Consumption of Shampoo, 1998-2010	VI-58
VI-39	Mexico - New Shampoo Launches, 2001-2002	VI-59
VI-40	Mexico - Surfactant Consumption in Shampoo, 1998-2010	VI-61
VI-41	U.S. - Consumption of Hair Conditioners, 1998-2010	VI-62
VI-42	U.S. - Hair Conditioner Producer and Brand Market Shares, 2001	VI-63
VI-43	Behenic-Based Ingredients and Their Hair Conditioner End Users, 2001	VI-65
VI-44	U.S. - Surfactant Consumption in Conditioners, 1998-2010	VI-67
VI-45	Canada - Consumption of Hair Conditioners, 1998-2010	VI-68
VI-46	Mexico - Consumption of Hair Conditioners, 1998-2010	VI-68
VI-47	Mexico - New Conditioner Launches	VI-69
VI-48	Mexico - Surfactant Consumption in Hair Conditioners, 1998-2010	VI-70
VI-49	U.S. - Consumption of Hair Styling Aids, 1998-2010	VI-71
VI-50	U.S. - Hair Styling Products Producer and Brand Market Shares, 2001	VI-73
VI-51	Estimated Hair Gel Formulation Ranges	VI-74
VI-52	Estimated Hair Mousse Formulation Ranges	VI-75
VI-53	U.S. - Surfactant Consumption in Hair Styling Aids, 1998-2010	VI-76
VI-54	U.S. - Consumption of Skin Care Products, 1998-2010	VI-77
VI-55	U.S. - Facial Cleanser Producer and Market Shares, 2001	VI-82
VI-56	U.S. - Facial Moisturizer Producer and Market Shares, 2001	VI-83
VI-57	U.S. - Hand and Body Lotion Producers and Market Shares, 2001	VI-84
VI-58	U.S. - Sun Care Producers and Market Shares, 2001	VI-85
VI-59	U.S. - Surfactant Consumption in Skin Care Products, 1998-2010	VI-89
VI-60	Canada - Consumption of Skin Care Products, 1998-2010	VI-90
VI-61	Canada - Surfactant Consumption in Skin Care Products, 1998-2010	VI-91
VI-62	Mexico - Consumption of Skin Care Products, 1998-2010	VI-91
VI-63	Mexico - New Skin Care Launches, 2001-2002	VI-92
VI-64	Mexico - Surfactant Consumption in Skin Care Products, 1998-2010	VI-93
VI-65	U.S. - Consumption of Bath and Shower Products, 1998-2010	VI-94
VI-66	U.S. - Bath and Shower Products Producer and Brand Market Shares, 2001	VI-96
VI-67	U.S. - Top Ten Mass Market Bath Additives Brands and Market Shares, 2001	VI-98
VI-68	Typical Body Wash Formulation Ranges	VI-99
VI-69	Typical Bubble Bath Formulation Ranges	VI-100
VI-70	Typical Bath Oil Formulation Ranges	VI-101
VI-71	U.S. - Surfactant Consumption in Bath and Shower Products, 1998-2010	VI-102
VI-72	Canada - Consumption of Bath and Shower Products, 1998-2010	VI-103
VI-73	Canada - Surfactant Consumption in Bath and Shower Products, 1998-2010	VI-103
VI-74	U.S. - Consumption of Toilet Soap Bars, 1998-2010	VI-104
VI-75	U.S. - Bar Soap Producer and Brand Market Shares, 2001	VI-106
VI-76	Typical Natural Soap Bar Composition	VI-107
VI-77	Typical Syndet and Combar Formulation Ranges	VI-108
VI-78	Neutrogena - Estimated Formulation Levels	VI-108
VI-79	U.S. - Surfactant Consumption in Toilet Soap Bars, 1998-2010	VI-110
VI-80	Canada - Consumption of Toilet Soap Bars, 1998-2010	VI-112
VI-81	Canada - Surfactant Consumption in Toilet Soap Bars, 1998-2010	VI-112
VI-82	Mexico - Consumption of Toilet Soap Bars, 1998-2010	VI-113

List of Tables (continued)

<u>Table</u>	<u>Page</u>
VI-83 Mexico - New Toilet Soap Bar Launches, 2001-2002	VI-113
VI-84 Mexico - Surfactant Consumption in Toilet Soap Bars, 1998-2010	VI-114
VI-85 U.S. - Consumption of Liquid Hand Soaps, 1998-2010	VI-115
VI-86 U.S. - Liquid Hand Soap Producer and Brand Market Shares, 2001	VI-117
VI-87 U.S. - Surfactant Consumption in Liquid Hand Soaps, 1998-2010	VI-119
VI-88 Canada - Consumption of Liquid Hand Soaps, 1998-2010	VI-120
VI-89 U.S. - Consumption of Toothpaste, 1998-2010	VI-121
VI-90 U.S. - Toothpaste Producer and Brand Market Shares, 2001	VI-123
VI-91 Typical Toothpaste Formulation Ranges	VI-125
VI-92 U.S. - Surfactant Consumption in Toothpaste, 1998-2010	VI-127
VI-93 Canada - Consumption of Toothpaste, 1998-2010	VI-128
VI-94 Canada - Surfactant Consumption in Toothpaste, 1998-2010	VI-128
VI-95 Mexico - Consumption of Toothpaste, 1998-2010	VI-129
VI-96 Mexico - Surfactant Consumption in Toothpaste, 1998-2010	VI-129
VI-97 U.S. - Consumption of Shaving Preparations, 1998-2010	VI-130
VI-98 U.S. - Shaving Cream Producer and Brand Market Shares, 2001	VI-132
VI-99 Typical Formulations for Shaving Foam and Gel	VI-133
VI-100 U.S. - Surfactant Consumption in Shaving Preparations, 1998-2010	VI-134
VI-101 Canada - Consumption of Shaving Preparations, 1998-2010	VI-135
VI-102 U.S. - Antiperspirant/Deodorant Producer Market Shares, 2001	VI-137
VI-103 U.S. - Mouthwash Producer Market Shares, 2001	VI-139
VI-104 U.S. - Hair Spray/Spritz Producer Market Shares, 2001	VI-141
VI-105 U.S. - Surfactant Consumption in Miscellaneous Personal Care Products, 1998-2010	VI-143
VII-1 U.S. - Consumption of Surfactants by End Use Category, 1998-2010	VII-3
VII-2 U.S. - Consumption of Surfactants in Household Products, 1998-2010	VII-3
VII-3 U.S. - Consumption of Surfactants in Personal Care Products, 1998-2010	VII-4
VII-4 U.S. - Consumption of Anionic Surfactants in Household and Personal Care Products, 1998-2010	VII-5
VII-5 U.S. - Consumption of Nonionic Surfactants in Household and Personal Care Products, 1998-2010	VII-6
VII-6 U.S. - Consumption of Cationic Surfactants in Household and Personal Care Products, 1998-2010	VII-7
VII-7 U.S. - Consumption of Amphoteric Surfactants in Household and Personal Care Products, 1998-2010	VII-7
VII-8 U.S. - Consumption of Other Surfactants in Household and Personal Care Products, 1998-2010	VII-8
VII-9 U.S. - Consumption of Alcohol Ethoxysulfates (AES) in Household and Personal Care Products, 1998-2010	VII-9
VII-10 U.S. - Consumption of Linear Alkylbenzene Sulfonates (LABS) in Household and Personal Care Products, 1998-2010	VII-10
VII-11 U.S. - Consumption of Soap in Household and Personal Care Products, 1998-2010	VII-11
VII-12 U.S. - Consumption of Alcohol Sulfates (AS) in Household and Personal Care Products, 1998-2010	VII-12
VII-13 U.S. - Consumption of Isethionates (IST) in Personal Care Products, 1998-2010	VII-13
VII-14 U.S. - Consumption of Methyl Ester Sulfonates (MES) in Household Products, 1998-2010	VII-13
VII-15 U.S. - Consumption of Sarcosinates (SA) in Personal Care Products, 1998-2010	VII-14

List of Tables (continued)

<u>Table</u>	<u>Page</u>
VII-16 U.S. - Consumption of Alkylglyceryl Ether Sulfonates (AGES) in Personal Care Products, 1998-2010	VII-14
VII-17 U.S. - Consumption of Sulfosuccinates (SS) in Personal Care Products, 1998-2010	VII-14
VII-18 U.S. - Consumption of Alpha-Olefin Sulfonates (AOS) in Household and Personal Care Products, 1998-2010	VII-15
VII-19 U.S. - Consumption of Diphenyl Oxide Disulfonates (DPOS) in Household Products, 1998-2010	VII-16
VII-20 U.S. - Consumption of Other Anionics in Household Products, 1998-2010	VII-16
VII-21 U.S. - Consumption of Alcohol Ethoxylates (AE) in Household and Personal Care Products, 1998-2010	VII-17
VII-22 U.S. - Consumption of Alkylphenol Ethoxylates (APE) in Household Products, 1998-2010	VII-18
VII-23 U.S. - Consumption of Sorbitol Esters and Ethoxylates (SOE) in Personal Care Products, 1998-2010	VII-18
VII-24 U.S. - Consumption of Glycerol and Glycol Esters (GGE) in Personal Care Products, 1998-2010	VII-19
VII-25 U.S. - Consumption of Amine Oxides (AO) in Household Products, 1998-2010	VII-19
VII-26 U.S. - Consumption of Alkanolamides (AD) in Household and Personal Care Products, 1998-2010	VII-20
VII-27 U.S. - Consumption of EO/PO Block Copolymers (PEPO) in Household and Personal Care Products, 1998-2010	VII-21
VII-28 U.S. - Consumption of Silicone Copolyols in Personal Care Products, 1998-2010	VII-21
VII-29 U.S. - Consumption of Linear Alcohol Alkoxylates (LAALK) in Household Products, 1998-2010	VII-22
VII-30 U.S. - Consumption of Glucosamides (GA) in Household Products, 1998-2010	VII-22
VII-31 U.S. - Consumption of Alkylpolyglycosides (APG) in Household and Personal Care Products, 1998-2010	VII-23
VII-32 U.S. - Consumption of Quaternary Ammonium Compounds (Quats) in Household and Personal Care Products, 1998-2010	VII-24
VII-33 U.S. - Consumption of Polyquaternaries (Polyquat) in Personal Care Products, 1998-2010	VII-24
VII-34 U.S. - Consumption of Other Cationics in Household Products, 1998-2010	VII-25
VII-35 U.S. - Consumption of Betaines in Household and Personal Care Products, 1998-2010	VII-26
VII-36 U.S. - Consumption of Other/Unspecified Amphoterics in Personal Care Products, 1998-2010	VII-27
VII-37 U.S. - Consumption of Other Surfactants in Household and Personal Care Products, 1998-2010	VII-28

LIST OF FIGURES

<u>Figure</u>		<u>Page</u>
II-1	Left to Right Pathways for Synthesis of Major Surfactants From Raw Materials and Intermediates	II-2
II-2	Fatty Acid Route to Oleo Alcohols	II-10
II-3	Methyl Ester Route to Oleo Alcohols	II-13
III-1	Value Chain Structure	III-4
IV-1	Direct Acetalization Route for APG	IV-2
IV-2	Akylpolyglycoside	IV-3
IV-3	Transacetalization Route for APG	IV-4
V-1	U.S. Household Market Segments by Volume and Value, 2002	V-1
V-2	Supply Chain Structure	V-73
V-3	North America - Hard Surface Cleaners Segmentation by Functionality and by Type, 2002	V-234
VI-1	U.S. - Personal Care Value Market Size by Segment, 2002	VI-2

SAMPLE TABLES

Table 5						
U.S. - CONSUMPTION OF HOUSEHOLD PRODUCTS BY END USE, 1998-2010 (million lbs)						
	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 multicient 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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