

Colin A. Houston and Associates, Inc.
announces the completion of a new study entitled

OPPORTUNITIES IN PERFORMANCE SURFACTANTS IN WEST EUROPE

The 2005 market for performance surfactants in Europe amounted to over 360,000 metric tons and was worth €738 million. Performance surfactants remain the formulators' best tools to fine tune and achieve special performance to differentiate new products. And as regulatory requirements increase pressure on surfactants, performance surfactants only become more attractive for their performance and suitable cost structures.

CAHA has carried out an in-depth analysis of ten of the most important performance surfactants covering product performance, differentiation, cost issues, consumption and trends, competing materials and systems. In addition, for each surfactant profiled, the study reviews major customers as well as producers, including production and market shares.

A series of profiles of 13 producers gives perspective on their products and positions held in the specialty surfactant market. Several producers hold a dominant position in the production of certain of the chemicals. For instance, Cognis, the largest supplier by value, holds the prevalent position in alkylnonyl glycosides (APG). BASF is the dominant producer of EO/PO block copolymers. Two of the producers profiled were sold to new owners in 2006. This sector continues to attract interest as it represents the heart of the surfactants field.

The report was completed in 2007 and is available for the price of \$18,000. The following pages contain the table of contents and other details of this study.

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	Tons (Thousand)	Euros (Million)	Ton Market Share (%)
ANIONIC SURFACTANTS			
Phosphate Esters			
Sarcosinates			
Sulfosuccinates			
ANIONIC TOTAL			
NONIONIC SURFACTANTS			
Alkylpolyglycosides			
Amine oxides			
EO/PO alcohols			
EO/PO block copolymers			
NONIONIC TOTAL			
CATIONIC SURFACTANTS			
Ethoxylated amines			
AMPHOTERIC SURFACTANTS			
Imidazolines and derivatives			
Betaines			
AMPHOTERIC TOTAL			
GRAND TOTAL			

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Producer	Estimated Production

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WEST EUROPE - BLOCK COPOLYMER END USE MARKETS, 2005		
	Tons	Value
Industrial and Institutional		
Beet Sugar		
Lubricant/Metalworking		
Radiation Curing Resins		
Textiles		
Personal Care/Pharmaceuticals		
Others Oilfield/Refinery Polymerization Paints/Coatings Crop Protection		
TOTAL		

Table II-47

WEST EUROPE - IMIDAZOLINE DERIVATIVE PRODUCERS AND PRODUCTION, 2005

	Company	Location	Production (tons)	Share (%)
Major				
Medium				
Minor				
Imports				
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 is 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, a bi-monthly report *LAB Market Report*, providing up-to-date market information and analysis for the world detergent alkylate market and a quarterly newsletter *Surfactant Developments Newsletter*, an on-going examination of issues and trends that affect surfactants.

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, 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, *OPPORTUNITIES IN PERFORMANCE SURFACTANTS IN WEST EUROPE*.

Joel H. Houston, President,

was the project leader for *OPPORTUNITIES IN PERFORMANCE SURFACTANTS IN WEST EUROPE* and numerous multiclient studies including *OPPORTUNITIES IN PERFORMANCE SURFACTANTS IN THE U.S.*, *HIGHER ALCOHOLS - FORECAST TO 2020*, *SURFACTANTS FOR EMERGING MARKETS IN ASIA/PACIFIC, 1996-2010*, *DETERGENT ALKYLATES - WORLD MARKETS, 1995-2010* and *SURFACTANTS FOR CONSUMER PRODUCTS - NORTH AMERICAN FORECAST TO 2008*. 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*, *THE LAB MARKET REPORT* and *SURFACTANT DEVELOPMENTS NEWSLETTER*. He is a member of CDMA, AOCS and ASTM.

Marilyn L. Bradshaw, Vice President,

authored sections of HIGHER ALCOHOLS - FORECAST TO 2020. She was the project leader for ALPHA-OLEFINS - WORLD MARKETS 2000-2010, INDUSTRIAL APPLICATIONS OF SURFACTANTS - NORTH AMERICAN FORECAST TO 2010 and POLYOLEFIN COMONOMERS - WORLD MARKETS, 1995-2005. Other multiclient studies she has directed include THE U.S. METALWORKING INDUSTRY AND SURFACTANT CONSUMPTION, 1995-2005, and U.S. I&I CLEANING PRODUCTS - SURFACTANT SUPPLIERS AND CUSTOMERS. 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.

Dr. Guido Bognolo, Senior Research Associate,

authored several sections of *OPPORTUNITIES IN PERFORMANCE SURFACTANTS IN WEST EUROPE* and has consulted in the field of surfactants, fine chemicals and product/business development. He is the European editor for the Annual Surfactants review. Prior to joining CAHA he worked for Uniqema, Brussels as a worldwide product manager of alkylene oxide surfactants and derivatives and as Director of Innovation prior to that. He previously worked for ICI for over 20 years in various positions including Business Development, Business Manager Industrial Surfactants. Prior to ICI, Dr. Bognolo worked for Procter & Gamble European Technical Center in Brussels formulating household detergents and also Atlas Chemical Industries in Brussels in the product and formulation development area for personal care, crop protection, polymer additives and general industrial applications. Dr. Bognolo holds a degree in Theoretical Chemistry from the University of Trieste, Italy.

H. James Bigalow, Senior Research Associate,

authored several sections of *OPPORTUNITIES IN PERFORMANCE SURFACTANTS IN WEST EUROPE*. In addition he has contributed to numerous multiclient studies including HIGHER ALCOHOLS - FORECAST TO 2020 and ALPHA-OLEFINS - WORLD MARKETS, INDUSTRIAL APPLICATIONS OF SURFACTANTS - NORTH AMERICAN FORECAST TO 2010, SURFACTANTS FOR EMERGING MARKETS IN ASIA/PACIFIC, 1995-2010, DETERGENT ALKYLATES - WORLD MARKETS, 1995-2010 and SURFACTANTS FOR CONSUMER PRODUCTS - NORTH AMERICAN FORECAST TO 2008. Mr. Bigalow has also 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 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.

Paul Sosis, Senior Research Associate,

authored several sections of *OPPORTUNITIES IN PERFORMANCE SURFACTANTS IN WEST EUROPE*. He has 37 years experience in the detergent and surfactants industry. He has contributed to CAHA's study *OPPORTUNITIES IN PERFORMANCE SURFACTANTS IN THE U.S.*, single-client projects, and to our detergent newsletter *Agglomerations*. Prior to working with CAHA, he was most recently associated with Patco Chemical Industries where he served as President. Previously he was employed by Witco Corporation for 25 years and held positions in marketing management, sales management, product management and research. Prior to Witco, Mr. Sosis held the position of Manager of the Customer Service Laboratory at Conoco Chemicals (currently Sasol No. America). He holds a B.S. degree from Brooklyn College in Chemistry and did his graduate work at New York University in Industrial Chemistry. He served two terms as Chairman of the Surfactants and Detergents Division of the American Oil Chemists Society. He is a member of the ACS, AOCS and ASTM.

HOW TO SUBSCRIBE

To subscribe to the study please contact CAHA at the address below.

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