

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

## SURFACTANT DEVELOPMENTS FORECAST TO 2010

The global surfactants market has evolved over the past ten years to the point that global producers compete for global positions in a range of markets. Local producers are no longer immune and are challenged in the area of major surfactants. The ongoing shift in producer alignments is creating a highly competitive new field. The acquisition of A&W by Huntsman and the sale of Cognis represent the kind of restructuring that is rapidly changing the field of surfactants into a highly structured global arena. The impact of these developments is affecting consumers as well as producers. Colin A. Houston & Associates, Inc. (CAHA) has produced a new report which assembles a comprehensive view of the materials, markets by region and producer profiles — nine global and four regional.

This new report was completed in August 2002 and is available in print or on-line over the internet.

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## DESCRIPTION OF THE STUDY

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In order to compete effectively, global and regional producers of primary surfactants need to understand the new global surfactant order and its implications for individual companies, markets and materials. CAHA's new study provides a thorough analysis of strategic developments, market trends, new technology, threats and opportunities that are reshaping the surfactant industry. It identifies and examines a range of important current topics and issues that will potentially impact the industry in the years to come. These include:

- S Industry restructuring through acquisitions, mergers and alliances. The study analyzes how this realignment of the players is affecting global and regional competition, and discusses the likely winners and losers. It identifies the new critical success factors.
- S It explains how individual companies are addressing the issue of finding the right mix of commodity and specialty products, and comments on the likely outcome of their strategies.
- The profiles of primary surfactant producers provide not only factual data, but insights and critical perspective on each company's evolving market position, goals, competitive advantages and shortcomings.
- S The study identifies which end use markets, products and regions have the best prospects in terms of growth and value. It defines the sizes of the merchant markets and gives market shares while it also contrasts the strategic approaches of companies chasing the same opportunities.
- S The potential impact of new competing materials, such as Modified Alkylbenzene Sulfonates (MABS) and Methyl Ester Sulfonates (MES), is examined.
- S The study analyzes the effect on the market of the new detergent alcohol capacity coming on stream, and details the outlook for oleochemicals vs synthetics. It explains the likely impact of this new capacity on the surfactant intermediates price structure.

In addition to addressing these and other important topics, the profiles of the nine global and four regional primary surfactant producers, detail their product mix, markets, integration, market positioning and direction. The profiles also include an analysis of their strengths, weaknesses, opportunities and threats (SWOT analysis).

### Global Producers

BASF Group  
Cognis Corporation  
Dow Chemical Company  
Huntsman Corporation  
Kao Corporation  
Rhodia  
Sasol Olefins and Surfactants  
Shell Chemical L.P.  
Stepan Company

### Regional Producers

Dr. W. Kolb AG  
Lion Corporation  
Oxiteno  
Tayca

In the section on surfactant market structure, the major surfactants themselves are profiled, including intermediates supply, surfactant capacity, pricing, utilization, as well as captive/merchant markets and producer market shares by region.

The report concludes with a chapter providing a forecast of the major surfactants by region and major application.

CAHA has a unique perspective on the surfactant business, developed from 30 years of experience in providing multiclient studies and proprietary consulting services to a client base spanning five continents. CAHA's projects, consulting, newsletters and market reports require regular communication with knowledgeable contacts at scores of companies, enlarging our understanding and refining and enhancing our extensive surfactant industry database.

This study is designed to provide insights and understanding that will enable clients to be more knowledgeable and successful market participants. There are two delivery options — hard copy or electronic version (see the Cost & Delivery section).

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MAJOR EUROPEAN SULFATOR/SULFONATOR PRODUCTS AND CAPACITIES, 2001 (thousand tons)						
Company	Capacity	Products			Integration	Comment
		LABS	AES/A S	Other		
TOTAL						



Table II-11

COGNIS - PRODUCTION LOCATIONS, PRODUCTS AND CAPACITIES, 2001  
(thousand tons)

Location	Process	Products	Capacity
<b>United States</b>			
<b>Argentina</b>			
<b>Brazil</b>			
<b>Mexico</b>			
<b>Venezuela</b>			
<b>France</b>			
<b>Germany</b>			
<b>Italy</b>			
<b>Spain</b>			
<b>China</b>			
<b>Indonesia</b>			
<b>Japan</b>			
<b>Malaysia</b>			
<b>Thailand</b>			
<b>Turkey</b>			

Table III-16					
WORLD - ALCOHOL ETHOXYSULFATES CONSUMPTION BY END USE, 2000-2010 (thousand tons)					
	2000	2002	2005	2010	AAGR % 2000-2010
Household					
Personal Care					
Industrial					
TOTAL					

Table III-22					
WORLD - ALCOHOL ETHOXYSULFATE CAPTIVE AND MERCHANT MARKET SHARES, 2000					
Region	Consumption (thousand tons)	Captive Market		Merchant Market	
		thousand tons	%	thousand tons	%
North America					
Latin America					
West Europe					
Asia					
TOTAL					

Table III-35		
NORTH AMERICA - ALCOHOL SULFATE MERCHANT MARKET SHARE BY MAJOR PRODUCER, 2000		
	Volume (thousand tons)	Market Share (percent)
TOTAL		

Table III-44					
LATIN AMERICA - ALCOHOL ETHOXYLATES CONSUMPTION BY END USE, 2000-2010 (thousand tons)					
	2000	2002	2005	2010	AAGR % 2000-2010
Household					
Personal Care					
Industrial					
TOTAL					

Table IV-22					
ASIA - PRIMARY SURFACTANT CONSUMPTION IN INDUSTRIAL USES, 2000-2010 (thousand tons)					
	2000	2002	2005	2010	AAGR% 2000-2010
Linear alkylbenzene sulfonates					
Alcohol ethoxysulfates					
Alcohol sulfates					
Alcohol ethoxylates					
Alkylphenol ethoxylates					
TOTAL					

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## QUALIFICATIONS AND PERSONNEL

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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 the bi-monthly *LAB Market Report*, providing up-to-date market information and analysis in 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, 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, *Surfactant Developments - Forecast to 2010*.

**Joel H. Houston, President,**

was the project leader for numerous multiclient studies including 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 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 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 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.

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## HOW TO SUBSCRIBE

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