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# SPECIALTY RAW MATERIALS FOR COSMETICS AND TOILETRIES: A GLOBAL SERIES OF REGIONAL MARKET ANALYSES

Volume I: Asia-Pacific 2002

China  
Korea  
Taiwan  
Southeast Asia

A completely new and expanded version of the Kline Group's benchmark series of syndicated reports



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Kline & Company is pleased to announce the publication of the first volume of **SPECIALTY RAW MATERIALS FOR COSMETICS AND TOILETRIES: A Global Series of Market Analyses**. This series forms part of Kline's global assessment of this complex and fragmented market and includes volumes on the Asia-Pacific region, Western Europe, Japan, and the United States. Other volumes are also planned for Central Eastern Europe and Brazil and Mexico.

**Volume I: Asia-Pacific 2002** delivers current, real-world intelligence, including:

- Distinct and detailed analyses of five major specialty raw material product categories and upward of 30 to 40 individual products
- Industry dynamics and key trends, including an assessment of the business implications of these issues
- An overview of the cosmetic and toiletry industry for each country covered
- A detailed assessment of customer purchasing considerations and their impact on raw material suppliers
- A comprehensive assessment of specialty raw material distribution channels
- Complete business profiles of 14 specialty raw material suppliers

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2. INTRODUCTION
3. CHINA
4. KOREA
5. TAIWAN
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*For each of the countries/regions listed above, the following product types are examined:*

- Specialty conditioning polymers
- Antimicrobials
- UV absorbers
- Hair-fixative and styling polymers
- Rheology-control agents

### 7. SUPPLIER PROFILES

#### 7A. Multinational Suppliers

- BASF
- Imperial Chemicals Industries
- International Specialty Products

#### 7B. Regional Suppliers

- Beijing Xiguangde Hongyuan
- Guangzhou Tianci High Tech Materials
- Keon Chang Company Limited
- Kunshan Shuangyou Daily Chemical Co.
- San Fu Chemical Co.
- Shanghai Celluloid
- Shanghai Goodway
- Shanghai S & D Fine Chemical Co.
- Shanghai Sunpower
- Shanghai Light Industry Research Institute
- Zhejiang Taizhou Regen Chemical

APPENDIX: List of Organizations Interviewed

## **MARKET OVERVIEW**

Specialty raw materials are defined by Kline as differentiated products that confer a distinct performance benefit to a formulated product. Compared with commodity products, specialty raw materials are sold in comparatively low volumes and at higher prices on a per-kilo basis. Such products are marketed for their performance characteristics and not by their chemical content or origin alone.

Consumption of specialty raw materials for cosmetics and toiletries in the Asia-Pacific region is estimated at \$300 million to \$350 million and is forecast to reach around \$500 million in 2006. China is the leading country in terms of consumption with between 50% and 60% of the total, followed by Southeast Asia, which accounts for around 30% of the total. Korea and Taiwan account for the balance.

Conditioning polymers are the leading product class, accounting for almost 40% of the total. Antimicrobials and rheology-control agents rank second and third with 30% and 20% of the market, respectively.

UV absorbers and hair-fixative and styling polymers account for the balance, as shown in Figure 1.

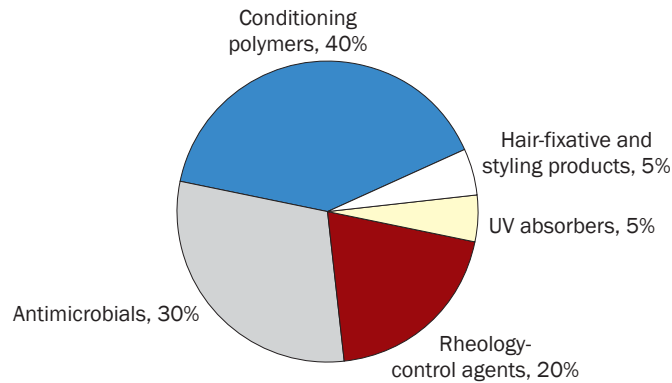
Forecast growth of specialty raw materials for cosmetic and toiletry applications will be very robust for many segments of this business but will vary by country. Local and multinational manufacturers and marketers of specialty raw materials for cosmetics and toiletries are now shifting their focus to the Asia-Pacific region in order to shore up long-term growth.

## **THE REPORT**

Timely and accurate information is a key requirement for formulating strategic business plans and identifying the real opportunities that exist in the Asia-Pacific region. This volume of **SPECIALTY RAW MATERIALS FOR COSMETICS AND TOILETRIES** provides an in-depth examination of this extremely complex and historically ill-defined market and serves as a critical reference tool to answer the industry's most challenging questions.

**Figure 1**

**ESTIMATED SPECIALTY RAW MATERIAL CONSUMPTION BY PRODUCT SEGMENT**



**Total: \$300 Million to \$250 Million**

This analysis provides the critical market and competitive intelligence needed to formulate effective and strategic business plans—for suppliers that are already participating in this market as well as those that are contemplating market entry.

## **RESEARCH METHODOLOGY**

Kline's research approach places the greatest emphasis on primary research to ensure that the foundation of business intelligence and insight is accurate and current.

This report is based on a series of interviews with more than 230 people at approximately 190 organizations throughout China, South Korea, Taiwan, Indonesia, Malaysia, Thailand, Australia, New Zealand, and the

Philippines, including consumers, distributors, contract manufacturers, suppliers, trade associations, and government agencies.

All interviews were made during the period from February 2002 through October 2002. The report also draws on (1) suppliers' product literature; (2) a search of recent trade and technical literature; (3) an analysis of statistical data from government, trade association, and industry sources; and (4) non-confidential data from Kline's library and files.

## **KLINER'S CREDENTIALS**

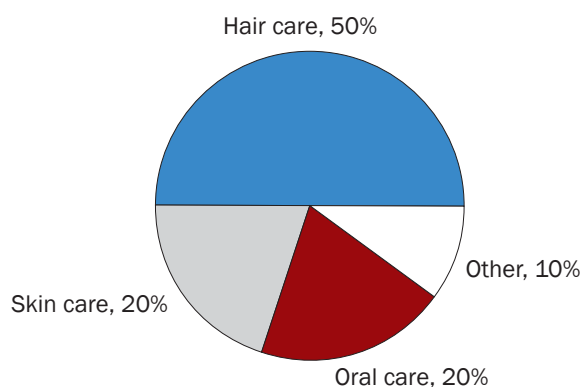
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The firm helps management solve practical problems in marketing strategies, acquisition and divestiture programs, and the appraisal of new technology. Kline provides clients with facts, forecasts, and recommended solutions to business problems, based solidly on the realities of the market as well as modern strategic principles.

Kline is unique in its ability to leverage the skills and synergies of our global Specialty Chemicals and Consumer practices to conduct this assignment. The company has developed in-depth expertise in specialty raw materials for cosmetic and toiletry applications as well as "downstream" formulated products by tracking and analyzing the business for more than 15 years.

**Figure 2**

**ESTIMATED SPECIALTY RAW MATERIAL CONSUMPTION BY APPLICATION**



**Total: \$300 Million to \$350 Million**

**SPECIALTY RAW MATERIALS FOR COSMETICS AND TOILETRIES, Volume I: Asia-Pacific 2002**

forms part of Kline's continuing global service and examines the markets for specialty raw materials for cosmetic and toiletry applications in China, South Korea, Taiwan, and Southeast Asia (Malaysia, Indonesia, Thailand, the Philippines, Australia, and New Zealand). Companion volumes include Western Europe 2002, Japan 2002, and United States 2003. Profiles on Central Eastern Europe as well as Mexico and Brazil are tentatively scheduled for first quarter 2004.

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