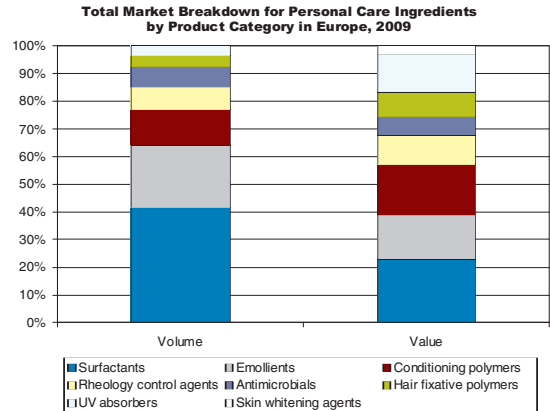


Global Personal Care Ingredients 2010: Europe Business Analysis and Opportunities

Fact Sheet

The Market

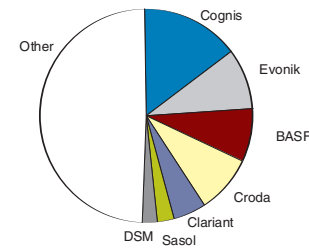
In 2009, the European personal care ingredients market reached nearly 280,000 tonnes on a 100% active basis. Due to their common use in many cosmetic and toiletry products, specialty surfactants are the leading product segment both in terms of volume and value. Emollients, Conditioning polymers and UV absorbers are other important segments.



Companies

The leading seven suppliers hold nearly 50% of the market share. Overall market leaders have significant sales in several market segments. For example, BASF is active in six product categories amongst the eight covered, and Clariant has a significant role in five categories. Surfactants and rheology control agents segments are the most fragmented segment whereas hair fixatives polymers and conditioning polymers are the most concentrated.

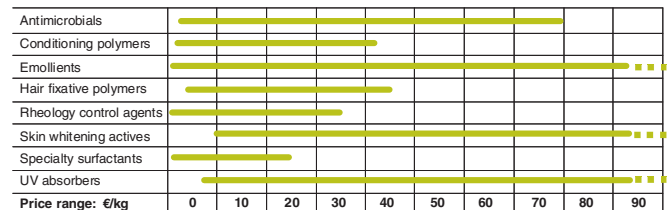
Market Share of the Leading Seven Suppliers in Europe, 2009



Pricing

Prices of personal care ingredients range from €1.00/kg to more than €2,000/kg for some very specific products. The most expensive products may be considered as functional products and are included in the emollient, skin whitening agent, and UV absorber categories. Specialty surfactants are the cheapest product category with a price roughly comprised between €1.00/kg and €25.00/kg.

Pricing Summary Europe, 2009



Future Outlook

The personal care ingredient market is expected to grow steadily at an average annual growth rate of about 2.5% on a volume basis. Due to the switch to more specialty products, the value growth is expected to be higher. After comparatively difficult years in 2008 and 2009, the market is expected to recovery quickly after the global economic downturn.

Volume Growth by Product Category in Europe, 2009 to 2014

