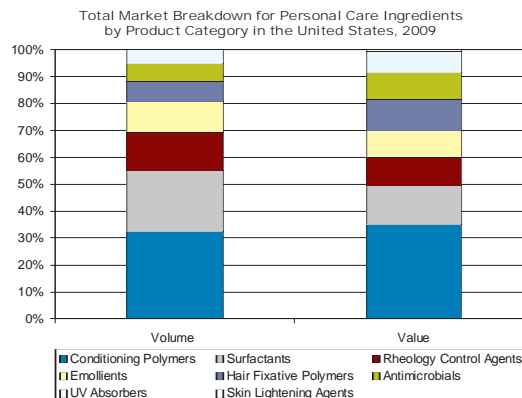


Global Personal Care Ingredients 2010: United States Business Analysis and Opportunities

Fact Sheet

The Market

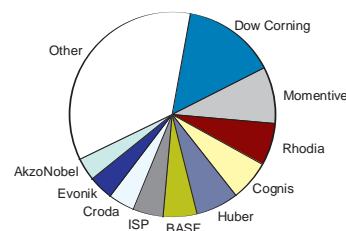
In 2009, the personal care ingredients market in the United States reached nearly \$1.4 billion. Conditioning polymers are the leading product category, notably thanks to a wide use in hair care, as well as in skin care products. Surfactants, rheology control agents, and emollients are other leading product categories in terms of volume sold.



Companies

Due to the importance of the conditioning polymers segment in the market and its high concentration, the market leaders are conditioning polymers suppliers; Dow Corning and Momentive. The leading ten suppliers hold nearly 75% of the market share. Overall market leaders have significant sales in several market segments, but concentration varies across market segments. Whereas the emollient, conditioning polymer, and hair fixative polymer suppliers basis are concentrated, the antimicrobials market is more fragmented.

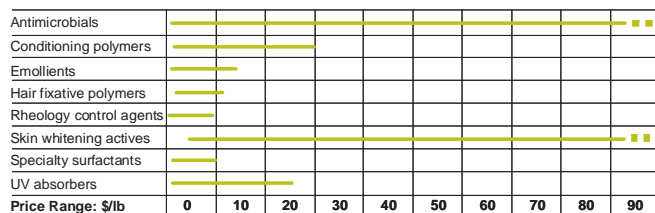
Market Share of the Leading Seven Suppliers in the United States, 2009



Pricing

In the USA, prices of personal care ingredients range from less than 1\$/lb to more than 700\$/lb. Antimicrobials and skin whitening actives are the two product categories considered in which some products' prices exceed 35\$/lb. Rheology control agents and surfactants are the cheapest product categories, with product prices not exceeding 10\$/lb.

Pricing Summary in the United States, 2009



Future Outlook

The US personal care ingredient market is expected to grow steadily at an average annual growth rate just over 2% on a volume basis. Conditioning polymers are expected to strengthen their leadership, whereas antimicrobials are expected to grow under average.

Volume Growth by Product Category in the United States, 2009 to 2014

