

Cleaners (Appearance Chemicals)

- \$655 million retail sales market

1. Protectants	\$255 million
2. Wax/Polish	\$190 million
3. Others	\$195M (e.g. Tire Cleaners)
- Major competitors in Protectants:

1. Armor-All (80% SOM of Protectants)		\$4-5 million in advertising in '92
2. First Brands (STP Son of a Gun)		
3. Turtle Wax		
- Major competitors in Wax/Polish

1. Turtle Wax (40% SOM)		80-85% of the market
2. Reed Union (Nu Finish)		
3. Armor-All (Rain Dance)		
4. First Brands (Simonize)		
- Very competitive category, a lot of players, brand name/advertising is important, P.O.S./packaging is critical.