



# Specialty Actives in Personal Care: Northeast Asia Market Analysis and Opportunities

To Be Published 4th Quarter 2018

Base Year: 2018

Forecasts to 2023

Regional Coverage: Japan ■ South Korea

Biofunctional active ingredients remain an attractive segment of the personal care ingredients industry. While Europe and the United States remain key markets, other geographies represent major potential growth areas. Particular consumer trends and expectations compared to Western markets, as well as different regulatory landscape make the Japan and South Korea two key target markets for specialty active ingredients manufacturers. These two reports complement the analysis of the markets of Europe, the United States, China, and Brazil and intend to give their subscribers the keys to succeed in these high-potential markets.

## This Program Helps Subscribers Answer Key Questions Such as:

- What is the size of the specialty actives market in each country, by product category, and functionality?
- What regulations are affecting innovation in each of these markets?
- What are local expectations, and how are active ingredients suppliers answering them?
- What are the growth prospects within each country and application for specialty actives?
- What are comparative pricing differences for each product?
- Who are the leading suppliers?
- What merger and acquisition activity has shaped the market?
- Which new products have entered the marketplace, and from whom have they taken market share?



## Tentative Report Contents\*

### Introduction

### Executive Summary

### Market Introduction and Overview

- Introduction to specialty actives
- Regulatory overview
- Competitive landscape

### Botanical Actives

### Biotechnology Products

### Marine Ingredients

### Proteins and Peptides

### Enzyme and Coenzymes

### Synthetic Active Ingredients

For each specialty active (Chapter 4-9), the following information will be provided:

- Market overview
- Pricing analysis
- Market sizing
- Competitive structure
- Market share analysis
- Key market drivers and constraints
- Market forecast and outlook

### Functionality Analysis

This chapter provides an overview of key functionality, for example, anti-aging, including the actives defined as “anti-aging” and potential for this market.

### Supplier Profiles

Ten suppliers are profiled in each regional report.

### Database

- The accompanying database provides quick access to the market data, including:
- Consumption of specialty active by functionality and country
- Supplier sales by specialty active by region
- Average market pricing by region
- Forecast consumption of specialty active within a five-year timeframe

\* Subject to charter subscriber input



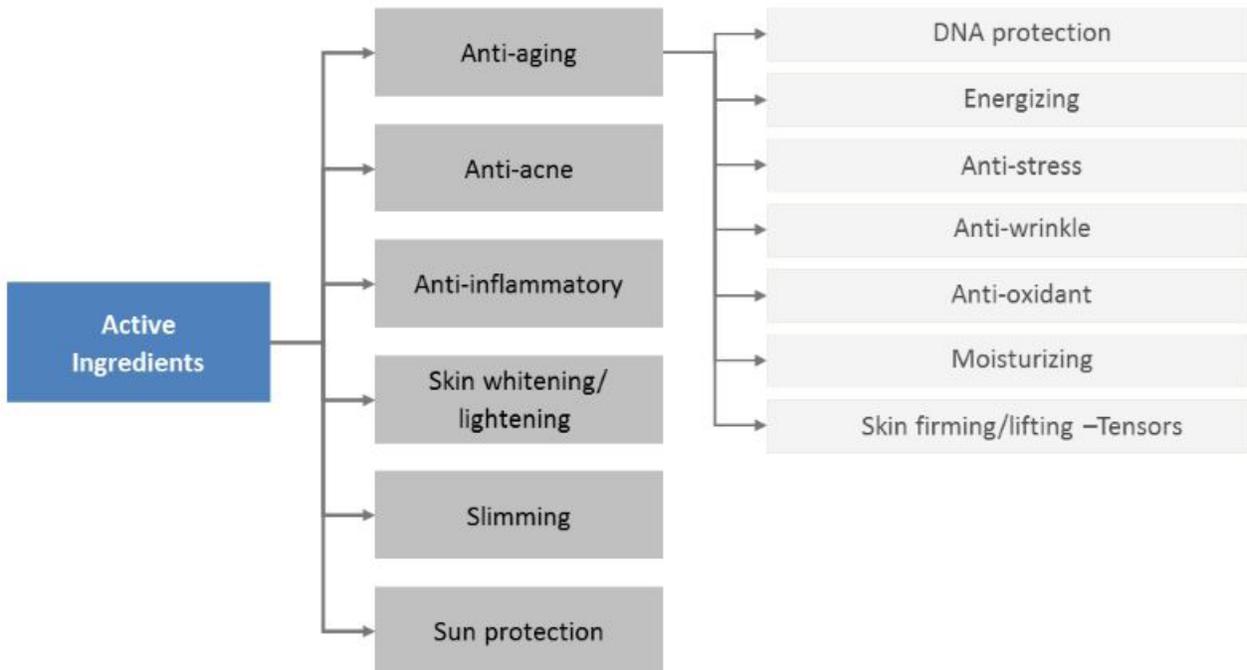


## Scope

Specialty Actives in Personal Care: Northeast Asia Market Analysis and Opportunities will provide a detailed independent appraisal of the two countries' markets. The reports will assess current and forecast demand by major product and functionality, product trends and prices, distribution channels, supplier sales, and technical and market trends. Specialty actives included within this program are grouped into the following categories:

- Botanical actives
- Biotechnology products
- Marine ingredients
- Proteins and peptides
- Enzymes and coenzymes
- Synthetic active ingredients

The following key functionality will be explored by specialty active family:





## Key Benefits

This research program will provide marketing and product managers and directors within the personal care ingredients industry with understanding of the evolution of the market in Japan and South Korea for each product group, and application. As a result, subscribers will be better positioned to exploit identified business opportunities at a day-to-day operational level and during the strategic planning process. This program will provide subscribers with:

- Identification of key growth by product to enable development of targeted sales and marketing strategies to exploit high growth areas
- Understanding of how local trends affect the supply and the demand of active ingredients
- Highlights of new product developments which will influence growth in the market and also impact market share of existing products, thus allowing subscribers to develop the appropriate business strategy to follow growth or protect share
- An appraisal of market trends, supply and demand drivers enabling subscribers to position their products to maximize trends within the market
- Competitive intelligence for use in benchmarking and to enable subscribers to identify best practice in the industry
- Forecasting scenarios from which to base solid strategic business plans



## Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 50-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

### Primary Research

#### We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Marketers/manufacturers
- Distributors
- Government agencies
- Retailers
- Suppliers
- Trade organizations

### Secondary Research

#### We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/ industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

### Comprehensive Market Intelligence

#### We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

## Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for over 50 years.

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