

# Specialty Actives in Personal Care: Global Market Analysis and Opportunities

**Base Year: 2022**

**Published:  
June 2023**

Biofunctional active ingredients continue to be among the fastest-growing segments in the personal care industry. This detailed appraisal of key regional markets for active ingredients assesses current and forecast demand by major ingredients, functionalities, prices, distribution channels, supplier sales, and technical and market trends.

**Regional Coverage:**

- Europe
- United States
- Brazil
- China
- India
- South Korea
- Japan

## SCOPE

- › More than 50 ingredients covered within 7 active ingredient groups as given in Table 1
- › Consumption of key active ingredients by region
- › Consumption of active ingredient categories by application in each region
- › Supplier sales by active ingredient category in each region
- › Forecast consumption of ingredients within a five-year timeframe
- › New product introductions from 2020 to 2022
- › Functionality and claim analysis

**NEW: Analysis on Consumer Perception of Active Ingredients**

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## Introduction

## Executive Summary

An overview of the report findings

## Market Overview

- Introduction to specialty actives
- Regulatory overview
- Competitive landscape

## Active Ingredient Categories

For each active ingredients category, the following information is provided:

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

## Functionality Analysis

An analysis of the market from the angle of key functionalities (i.e., anti-aging, skin lightening, anti-inflammatory) is provided. Anti-aging is split out by sub-functionality into anti-wrinkle, moisturizing, etc.

## Claim Analysis

While functionality is an important product attribute, claims (i.e., antipollution, blue light protection, etc.) are equally important, as they are often used in the finished product's marketing messages.

## Consumer Perception Analysis

Analysis on the consumer perception of active ingredients and their claims over time and on different age and social groups. This analysis is based on data from social listening tools.

## Supplier Profiles

10 supplier profiles in each regional report are provided.

## INCLUDES INTERACTIVE DATABASE



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**TABLE 1: ACTIVE INGREDIENTS COVERED**

CATEGORY	SELECTED INGREDIENTS
Botanical actives	Aloe vera, Bisabolol, Green tea, Grape seed, etc.
Biotechnology Products	Hyaluronic acid and salts (split by molecular weight), Ceramides (AP, EOP, NG, NP, NS), Stem cell extracts, Betaglucans, prebiotics, probiotics, etc.
Enzymes and coenzymes	Coenzyme Q10, others
Marine ingredients	Substantiated algae extracts, Chitosan, etc.
Peptides	Argireline, Biopeptide, Eyeseril, Matrixyl range, etc.
Proteins	Amino-acids, Collagen, Hydrolyzates, Native proteins, Quat proteins, etc.
Synthetic actives	Allantoin, Arbutin, Vitamin A and derivatives, Vitamin B and derivatives, Vitamin C and derivatives, Vitamin E and derivatives, etc.

**TABLE 2: DATA SEGMENTATION**

Botanical actives	By certification type (COSMOS, Natrue, etc.)
All active categories	<ul style="list-style-type: none"> <li>- By substantiation type (in-vivo, in-vitro/ex-vivo, others)</li> <li>- By ISO 16128 status (natural/Derived-natural/non-natural)</li> </ul>

## REPORT BENEFITS

This report provides marketing and product managers in the personal care ingredients industry with an understanding of the evolution of the active ingredients market in each significant region, product group, and application. It also offers:

Identification of key growth by product and geography to enable the development of targeted sales and marketing strategies to exploit high-growth areas

Highlights of new product developments, which will impact market shares of the existing products, thus allowing subscribers to develop the appropriate business strategy to follow growth or protect share

Forecasts of 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 60-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. Our industry expertise is elevated by technology and systematic data collection processes to deliver more predictive and actionable data and insights.

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