



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

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Base Year: 2013

Forecasts to 2018

**Regional Coverage:** United States ■ Europe ■ China ■ Brazil

Functional activity has become a key marketing focus in skin care and globally in recent years. While the large North American and European market used to be the largest consumers and the trend-setters, the actives ingredients is evolving into a truly global market. This report program focuses on specialty actives, namely those used in cosmetic applications for anti-aging, anti-acne, anti-inflammatory, and other skin benefits.

## This Report Will Help Subscribers Address Questions Such as:

- What is the size of the specialty actives market by region, product category, and functionality?
- What are the growth prospects within each region and application for specialty actives?
- What regulations are affecting the market?
- What are comparative pricing differences for each product by region?
- Who are the leading suppliers?
- Which new products have entered the marketplace, and from whom have they taken market share?

*Alongside our comprehensive market reports, data is also accessible via an interactive online database.*



## 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

For each specialty active (Chapter 4-8), 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 2013 market data; with historic data for Europe and the United States from 2007 and 2010. The interactive functions of the database allows users to customize views according to supplier, ingredient type, and application. Data includes:

- Consumption of specialty active by functionality and region
- Supplier sales by specialty active by region
- Average market pricing by region
- Forecast consumption of specialty active within a five-year timeframe



## Scope

Specialty Actives in Personal Care: Global Market Analysis and Opportunities provides a detailed independent appraisal of key regional markets including large Europe, and the United States, but also China and Brazil, which are growing. The reports 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

The following key functionality is explored by specialty active family:

- Anti-aging
- Anti-acne
- Anti-inflammatory
- Skin whitening/lightening
- Sun protection

## Key Benefits

This research program provides marketing and product managers and directors within the personal care ingredients industry with understanding of the evolution of the market in each significant region, 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 provides subscribers with:

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

*The database program features the FutureView forecasting tool, which allows users to easily change variables to run various "what if" demand scenarios that helps shape business strategy development.*

*In this edition, the functionality perspective is explored in detail to reflect cross-category product competition based on claimed functionality.*



## 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 procurement and assessment, 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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