

Global Cruelty-Free Cosmetics Market Size Study & Forecast, by Product (Skincare, Body Skincare, Haircare, Makeup, Fragrance), End Use (Women, Men, Unisex, Children), Distribution Channel (Hypermarkets & Supermarkets, Specialty Stores, Pharmacies & Drugstores, Online, Others) and Regional Forecasts 2025-2035

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Abstracts

The Global Cruelty-Free Cosmetics Market is valued at approximately USD 15.85 billion in 2024 and is projected to grow at a CAGR of more than 6.80% throughout 2025-2035. Positioned at the intersection of ethics, beauty, and conscious consumerism, cruelty-free cosmetics have swiftly moved from niche shelves to mainstream aisles as brands accelerate efforts to phase out animal testing and embrace transparent, sustainable formulations. These products—ranging from skincare and makeup to fragrances—are manufactured without subjecting ingredients or finished items to animal experimentation. As global consumers lean toward values-driven purchasing, cruelty-free alternatives have gained relevance, offering companies lucrative opportunities to cement brand loyalty and expand into emerging ethical beauty categories. This surge is further amplified by tightening regulatory mandates, heightened awareness around animal welfare, and an industry-wide shift toward clean, plant-derived ingredients.

Over the past several years, demand for ethically developed beauty products has climbed at an unprecedented pace, driven primarily by younger demographics who openly advocate for humane testing practices and supply-chain accountability. As major brands overhaul legacy testing protocols and indie labels champion transparency, the market has witnessed a rapid influx of cruelty-free launches across digital and offline channels. According to global consumer behavior indicators, beauty shoppers are now

twice as likely to purchase products labeled vegan, eco-friendly, and cruelty-free compared to five years ago. Moreover, the proliferation of certification agencies and standardized cruelty-free labeling has clarified the purchase path, empowering consumers to move away from conventional formulations. Although the influx of synthetic-free and botanical alternatives expands market potential, stringent manufacturing guidelines and the persistence of counterfeit labeling practices pose challenges for brands navigating compliance across multiple regions.

The detailed segments and sub-segments included in the report are:

By Product:

Skincare

Body Skincare

Haircare

Makeup

Fragrance

By End Use:

Women

Men

Unisex

Children

By Distribution Channel:

Hypermarkets & Supermarkets

Specialty Stores

Pharmacies & Drugstores

Online

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Skincare is Expected to Dominate the Market

Skincare continues to command the largest share of the cruelty-free cosmetics landscape, accounting for a significant portion of global revenue. As consumers increasingly seek preventive care, dermatological clarity, and natural ingredient profiles, cruelty-free skincare formulas have captured market leadership. This dominance stems from heightened adoption of daily-use essentials—including moisturizers, serums, sunscreens, and facial treatments—where ethical production plays a persuasive role in decision-making. Moreover, the rise of multifunctional botanical extracts and science-backed irritation-free formulations has encouraged both brands and consumers to pivot toward sustainable skincare that meets efficacy expectations without compromising moral values. While adjacent categories such as makeup and haircare are witnessing robust momentum, skincare maintains a wider consumer base and remains the

strongest anchor for market expansion.

Makeup Leads in Revenue Contribution

Makeup currently stands out as the leading revenue-generating product segment, driven by high product frequency, strong brand marketing campaigns, and a massive global influencer ecosystem that consistently spotlights cruelty-free alternatives. Color cosmetics—such as lipsticks, foundations, eyeshadows, and mascaras—have benefited from rapid product innovation, long-wear technologies, and the rising trend of vegan pigment formulations that do not rely on animal-derived ingredients. While skincare dominates in volume and everyday usage, makeup secures the highest revenue share due to premium pricing, repeat purchase cycles, and its strong presence in both offline beauty retailers and digital marketplaces. As consumer preference tilts toward clean glam trends and non-toxic formulations, this segment is anticipated to maintain steady momentum over the forecast period.

North America held the largest market share in 2025, benefiting from an established beauty industry, strong regulatory backing against animal testing, and rapid expansion of vegan and cruelty-free product lines across major retail chains. Europe follows closely, supported by long-standing legislation that bans animal-tested cosmetics and a consumer base that prioritizes sustainability and premium ethical brands. Meanwhile, Asia Pacific is projected to exhibit the fastest growth, propelled by surging beauty spending across India, China, South Korea, and Japan. The region's growing middle-class population, rising awareness of cruelty-free certifications, digital-first purchasing behavior, and the gradual relaxation of mandatory animal-testing laws in key markets have significantly accelerated category adoption. Latin America and the Middle East & Africa also show meaningful growth opportunities as global brands penetrate new urban centers and e-commerce platforms broaden access to ethical beauty products.

Major market players included in this report are:

L'Oreal S.A.

Estee Lauder Companies Inc.

Unilever plc

Coty Inc.

Procter & Gamble

Shiseido Company, Limited

e.l.f. Beauty, Inc.

Lush Retail Ltd.

Natura &Co

The Body Shop

Kendo Holdings

Amorepacific Corporation

Puig

Kao Corporation

Henkel AG & Co. KGaA

Global Cruelty-Free Cosmetics Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025-2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth Factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country,

regional & segment scope*

The objective of the study is to define market sizes of different segments and countries in recent years and to forecast industry values for the upcoming decade. The report integrates qualitative and quantitative insights, outlining the essential drivers and restraints that shape future growth dynamics. Moreover, it identifies opportunities in niche market clusters, enabling stakeholders to make strategic investment decisions. The competitive landscape assessment further highlights key product offerings and strategic initiatives undertaken by leading players across the cruelty-free cosmetics value chain. The detailed segments and sub-segments of the market are explained below:

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level insights.

Competitive landscape featuring comprehensive profiles of major market players.

Assessment of key business strategies with recommendations for future market approach.

Evaluation of the competitive structure of the market.

Demand-side and supply-side market analysis.

Contents

CHAPTER 1. GLOBAL CRUELTY-FREE COSMETICS MARKET REPORT SCOPE & METHODOLOGY

- 1.1. Research Objective
- 1.2. Research Methodology
 - 1.2.1. Forecast Model
 - 1.2.2. Desk Research
 - 1.2.3. Top Down and Bottom-Up Approach
- 1.3. Research Attributes
- 1.4. Scope of the Study
 - 1.4.1. Market Definition
 - 1.4.2. Market Segmentation
- 1.5. Research Assumption
 - 1.5.1. Inclusion & Exclusion
 - 1.5.2. Limitations
 - 1.5.3. Years Considered for the Study

CHAPTER 2. EXECUTIVE SUMMARY

- 2.1. CEO/CXO Standpoint
- 2.2. Strategic Insights
- 2.3. ESG Analysis
- 2.4. key Findings

CHAPTER 3. GLOBAL CRUELTY-FREE COSMETICS MARKET FORCES ANALYSIS

- 3.1. Market Forces Shaping The Global Cruelty-Free Cosmetics Market (2024-2035)
- 3.2. Drivers
 - 3.2.1. Surging Incidence Of Growth Hormone Deficiencies
 - 3.2.2. Increasing Geriatric Population
- 3.3. Restraints
 - 3.3.1. Shortage Of Skilled Professionals
- 3.4. Opportunities
 - 3.4.1. Growing Awareness About Hormonal Deficiencies

CHAPTER 4. GLOBAL CRUELTY-FREE COSMETICS INDUSTRY ANALYSIS

Global Cruelty-Free Cosmetics Market Size Study & Forecast, by Product (Skincare, Body Skincare, Haircare, Mak...

- 4.1. Porter's 5 Forces Model
 - 4.1.1. Bargaining Power of Buyer
 - 4.1.2. Bargaining Power of Supplier
 - 4.1.3. Threat of New Entrants
 - 4.1.4. Threat of Substitutes
 - 4.1.5. Competitive Rivalry
- 4.2. Porter's 5 Force Forecast Model (2024-2035)
- 4.3. PESTEL Analysis
 - 4.3.1. Political
 - 4.3.2. Economical
 - 4.3.3. Social
 - 4.3.4. Technological
 - 4.3.5. Environmental
 - 4.3.6. Legal
- 4.4. Top Investment Opportunities
- 4.5. Top Winning Strategies (2025)
- 4.6. Market Share Analysis (2024-2025)
- 4.7. Global Pricing Analysis And Trends 2025
- 4.8. Analyst Recommendation & Conclusion

CHAPTER 5. GLOBAL CRUELTY-FREE COSMETICS MARKET SIZE & FORECASTS BY PRODUCT 2025-2035

- 5.1. Market Overview
- 5.2. Global Cruelty-Free Cosmetics Market Performance - Potential Analysis (2025)
- 5.3. Skincare
 - 5.3.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 5.3.2. Market size analysis, by region, 2025-2035
- 5.4. Body Skincare
 - 5.4.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 5.4.2. Market size analysis, by region, 2025-2035
- 5.5. Haircare
 - 5.5.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 5.5.2. Market size analysis, by region, 2025-2035
- 5.6. Makeup
 - 5.6.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 5.6.2. Market size analysis, by region, 2025-2035
- 5.7. Fragrance

5.7.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

5.7.2. Market size analysis, by region, 2025-2035

CHAPTER 6. GLOBAL CRUELTY-FREE COSMETICS MARKET SIZE & FORECASTS BY END USE 2025-2035

6.1. Market Overview

6.2. Global Cruelty-Free Cosmetics Market Performance - Potential Analysis (2025)

6.3. Women

6.3.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

6.3.2. Market size analysis, by region, 2025-2035

6.4. Men

6.4.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

6.4.2. Market size analysis, by region, 2025-2035

6.5. Unisex

6.5.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

6.5.2. Market size analysis, by region, 2025-2035

6.6. Children

6.6.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

6.6.2. Market size analysis, by region, 2025-2035

CHAPTER 7. GLOBAL CRUELTY-FREE COSMETICS MARKET SIZE & FORECASTS BY DISTRIBUTION CHANNEL 2025–2035

7.1. Market Overview

7.2. Global Cruelty-Free Cosmetics Market Performance - Potential Analysis (2025)

7.3. Hypermarkets & Supermarkets

7.3.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

7.3.2. Market size analysis, by region, 2025-2035

7.4. Specialty Stores

7.4.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

7.4.2. Market size analysis, by region, 2025-2035

7.5. Pharmacies & Drugstores

7.5.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

7.5.2. Market size analysis, by region, 2025-2035

7.6. Online

7.6.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

7.6.2. Market size analysis, by region, 2025-2035

7.7. Others

- 7.7.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
- 7.7.2. Market size analysis, by region, 2025-2035

CHAPTER 8. GLOBAL CRUELTY-FREE COSMETICS MARKET SIZE & FORECASTS BY REGION 2025–2035

- 8.1. Growth Cruelty-Free Cosmetics Market, Regional Market Snapshot
- 8.2. Top Leading & Emerging Countries
- 8.3. North America Cruelty-Free Cosmetics Market
 - 8.3.1. U.S. Cruelty-Free Cosmetics Market
 - 8.3.1.1. Product breakdown size & forecasts, 2025-2035
 - 8.3.1.2. End Use breakdown size & forecasts, 2025-2035
 - 8.3.1.3. Distribution Channel breakdown size & forecasts, 2025-2035
 - 8.3.2. Canada Cruelty-Free Cosmetics Market
 - 8.3.2.1. Product breakdown size & forecasts, 2025-2035
 - 8.3.2.2. End Use breakdown size & forecasts, 2025-2035
 - 8.3.2.3. Distribution Channel breakdown size & forecasts, 2025-2035
- 8.4. Europe Cruelty-Free Cosmetics Market
 - 8.4.1. UK Cruelty-Free Cosmetics Market
 - 8.4.1.1. Product breakdown size & forecasts, 2025-2035
 - 8.4.1.2. End Use breakdown size & forecasts, 2025-2035
 - 8.4.1.3. Distribution Channel breakdown size & forecasts, 2025-2035
 - 8.4.2. Germany Cruelty-Free Cosmetics Market
 - 8.4.2.1. Product breakdown size & forecasts, 2025-2035
 - 8.4.2.2. End Use breakdown size & forecasts, 2025-2035
 - 8.4.2.3. Distribution Channel breakdown size & forecasts, 2025-2035
 - 8.4.3. France Cruelty-Free Cosmetics Market
 - 8.4.3.1. Product breakdown size & forecasts, 2025-2035
 - 8.4.3.2. End Use breakdown size & forecasts, 2025-2035
 - 8.4.3.3. Distribution Channel breakdown size & forecasts, 2025-2035
 - 8.4.4. Spain Cruelty-Free Cosmetics Market
 - 8.4.4.1. Product breakdown size & forecasts, 2025-2035
 - 8.4.4.2. End Use breakdown size & forecasts, 2025-2035
 - 8.4.4.3. Distribution Channel breakdown size & forecasts, 2025-2035
 - 8.4.5. Italy Cruelty-Free Cosmetics Market
 - 8.4.5.1. Product breakdown size & forecasts, 2025-2035
 - 8.4.5.2. End Use breakdown size & forecasts, 2025-2035
 - 8.4.5.3. Distribution Channel breakdown size & forecasts, 2025-2035
 - 8.4.6. Rest of Europe Cruelty-Free Cosmetics Market

- 8.4.6.1. Product breakdown size & forecasts, 2025-2035
- 8.4.6.2. End Use breakdown size & forecasts, 2025-2035
- 8.4.6.3. Distribution Channel breakdown size & forecasts, 2025-2035
- 8.5. Asia Pacific Cruelty-Free Cosmetics Market
 - 8.5.1. China Cruelty-Free Cosmetics Market
 - 8.5.1.1. Product breakdown size & forecasts, 2025-2035
 - 8.5.1.2. End Use breakdown size & forecasts, 2025-2035
 - 8.5.1.3. Distribution Channel breakdown size & forecasts, 2025-2035
 - 8.5.2. India Cruelty-Free Cosmetics Market
 - 8.5.2.1. Product breakdown size & forecasts, 2025-2035
 - 8.5.2.2. End Use breakdown size & forecasts, 2025-2035
 - 8.5.2.3. Distribution Channel breakdown size & forecasts, 2025-2035
 - 8.5.3. Japan Cruelty-Free Cosmetics Market
 - 8.5.3.1. Product breakdown size & forecasts, 2025-2035
 - 8.5.3.2. End Use breakdown size & forecasts, 2025-2035
 - 8.5.3.3. Distribution Channel breakdown size & forecasts, 2025-2035
 - 8.5.4. Australia Cruelty-Free Cosmetics Market
 - 8.5.4.1. Product breakdown size & forecasts, 2025-2035
 - 8.5.4.2. End Use breakdown size & forecasts, 2025-2035
 - 8.5.4.3. Distribution Channel breakdown size & forecasts, 2025-2035
 - 8.5.5. South Korea Cruelty-Free Cosmetics Market
 - 8.5.5.1. Product breakdown size & forecasts, 2025-2035
 - 8.5.5.2. End Use breakdown size & forecasts, 2025-2035
 - 8.5.5.3. Distribution Channel breakdown size & forecasts, 2025-2035
 - 8.5.6. Rest of APAC Cruelty-Free Cosmetics Market
 - 8.5.6.1. Product breakdown size & forecasts, 2025-2035
 - 8.5.6.2. End Use breakdown size & forecasts, 2025-2035
 - 8.5.6.3. Distribution Channel breakdown size & forecasts, 2025-2035
- 8.6. Latin America Cruelty-Free Cosmetics Market
 - 8.6.1. Brazil Cruelty-Free Cosmetics Market
 - 8.6.1.1. Product breakdown size & forecasts, 2025-2035
 - 8.6.1.2. End Use breakdown size & forecasts, 2025-2035
 - 8.6.1.3. Distribution Channel breakdown size & forecasts, 2025-2035
 - 8.6.2. Mexico Cruelty-Free Cosmetics Market
 - 8.6.2.1. Product breakdown size & forecasts, 2025-2035
 - 8.6.2.2. End Use breakdown size & forecasts, 2025-2035
 - 8.6.2.3. Distribution Channel breakdown size & forecasts, 2025-2035
- 8.7. Middle East and Africa Cruelty-Free Cosmetics Market
 - 8.7.1. UAE Cruelty-Free Cosmetics Market

- 8.7.1.1. Product breakdown size & forecasts, 2025-2035
- 8.7.1.2. End Use breakdown size & forecasts, 2025-2035
- 8.7.1.3. Distribution Channel breakdown size & forecasts, 2025-2035
- 8.7.2. Saudi Arabia (KSA) Cruelty-Free Cosmetics Market
 - 8.7.2.1. Product breakdown size & forecasts, 2025-2035
 - 8.7.2.2. End Use breakdown size & forecasts, 2025-2035
 - 8.7.2.3. Distribution Channel breakdown size & forecasts, 2025-2035
- 8.7.3. South Africa Cruelty-Free Cosmetics Market
 - 8.7.3.1. Product breakdown size & forecasts, 2025-2035
 - 8.7.3.2. End Use breakdown size & forecasts, 2025-2035
 - 8.7.3.3. Distribution Channel breakdown size & forecasts, 2025-2035

CHAPTER 9. COMPETITIVE INTELLIGENCE

- 9.1. Top Market Strategies
- 9.2. L'Oreal S.A.
 - 9.2.1. Company Overview
 - 9.2.2. Key Executives
 - 9.2.3. Company Snapshot
 - 9.2.4. Financial Performance (Subject to Data Availability)
 - 9.2.5. Product/Services Port
 - 9.2.6. Recent Development
 - 9.2.7. Market Strategies
 - 9.2.8. SWOT Analysis
- 9.3. Estee Lauder Companies Inc.
- 9.4. Unilever plc
- 9.5. Coty Inc.
- 9.6. Procter & Gamble
- 9.7. Shiseido Company, Limited
- 9.8. e.l.f. Beauty, Inc.
- 9.9. Lush Retail Ltd.
- 9.10. Natura &Co
- 9.11. The Body Shop
- 9.12. Kendo Holdings
- 9.13. Amorepacific Corporation
- 9.14. Puig
- 9.15. Kao Corporation
- 9.16. Henkel AG & Co. KGaA

List Of Tables

LIST OF TABLES

Table 1. Global Cruelty-Free Cosmetics Market, Report Scope

Table 2. Global Cruelty-Free Cosmetics Market Estimates & Forecasts By Region
2024–2035

Table 3. Global Cruelty-Free Cosmetics Market Estimates & Forecasts By Segment
2024–2035

Table 4. Global Cruelty-Free Cosmetics Market Estimates & Forecasts By Segment
2024–2035

Table 5. Global Cruelty-Free Cosmetics Market Estimates & Forecasts By Segment
2024–2035

Table 6. Global Cruelty-Free Cosmetics Market Estimates & Forecasts By Segment
2024–2035

Table 7. Global Cruelty-Free Cosmetics Market Estimates & Forecasts By Segment
2024–2035

Table 8. U.S. Cruelty-Free Cosmetics Market Estimates & Forecasts, 2024–2035

Table 9. Canada Cruelty-Free Cosmetics Market Estimates & Forecasts, 2024–2035

Table 10. UK Cruelty-Free Cosmetics Market Estimates & Forecasts, 2024–2035

Table 11. Germany Cruelty-Free Cosmetics Market Estimates & Forecasts, 2024–2035

Table 12. France Cruelty-Free Cosmetics Market Estimates & Forecasts, 2024–2035

Table 13. Spain Cruelty-Free Cosmetics Market Estimates & Forecasts, 2024–2035

Table 14. Italy Cruelty-Free Cosmetics Market Estimates & Forecasts, 2024–2035

Table 15. Rest Of Europe Cruelty-Free Cosmetics Market Estimates & Forecasts,
2024–2035

Table 16. China Cruelty-Free Cosmetics Market Estimates & Forecasts, 2024–2035

Table 17. India Cruelty-Free Cosmetics Market Estimates & Forecasts, 2024–2035

Table 18. Japan Cruelty-Free Cosmetics Market Estimates & Forecasts, 2024–2035

Table 19. Australia Cruelty-Free Cosmetics Market Estimates & Forecasts, 2024–2035

Table 20. South Korea Cruelty-Free Cosmetics Market Estimates & Forecasts,
2024–2035

.....

List Of Figures

LIST OF FIGURES

- Fig 1. Global Cruelty-Free Cosmetics Market, Research Methodology
 - Fig 2. Global Cruelty-Free Cosmetics Market, Market Estimation Techniques
 - Fig 3. Global Market Size Estimates & Forecast Methods
 - Fig 4. Global Cruelty-Free Cosmetics Market, Key Trends 2025
 - Fig 5. Global Cruelty-Free Cosmetics Market, Growth Prospects 2024–2035
 - Fig 6. Global Cruelty-Free Cosmetics Market, Porter’s Five Forces Model
 - Fig 7. Global Cruelty-Free Cosmetics Market, Pestel Analysis
 - Fig 8. Global Cruelty-Free Cosmetics Market, Value Chain Analysis
 - Fig 9. Cruelty-Free Cosmetics Market By Application, 2025 & 2035
 - Fig 10. Cruelty-Free Cosmetics Market By Segment, 2025 & 2035
 - Fig 11. Cruelty-Free Cosmetics Market By Segment, 2025 & 2035
 - Fig 12. Cruelty-Free Cosmetics Market By Segment, 2025 & 2035
 - Fig 13. Cruelty-Free Cosmetics Market By Segment, 2025 & 2035
 - Fig 14. North America Cruelty-Free Cosmetics Market, 2025 & 2035
 - Fig 15. Europe Cruelty-Free Cosmetics Market, 2025 & 2035
 - Fig 16. Asia Pacific Cruelty-Free Cosmetics Market, 2025 & 2035
 - Fig 17. Latin America Cruelty-Free Cosmetics Market, 2025 & 2035
 - Fig 18. Middle East & Africa Cruelty-Free Cosmetics Market, 2025 & 2035
 - Fig 19. Global Cruelty-Free Cosmetics Market, Company Market Share Analysis (2025)
-

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