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Global Freeze Dried Cosmetic Product Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Freeze Dried Cosmetic Product market size is expected to reach $ 8499 million by 2032, rising at a market growth of 7.7% CAGR during the forecast period (2026-2032).

In 2025, global production of freeze-dried cosmetics reached 108.78 million units, with an average selling price of US$45 per unit.

To address the problems of traditional cosmetics, such as the easy destruction of active ingredients by high temperatures during production, storage, and use; the need to add preservatives to extend shelf life; the resulting decline in skincare efficacy; increased risk of skin irritation; and insufficient environmental friendliness, freeze-dried cosmetics emerged. This product is a new type of skincare product produced using vacuum freeze-drying technology. Its core principle is to freeze cosmetic concentrates containing highly active ingredients (such as probiotics, plant extracts, peptides, and vitamins) into a solid state under low temperature and vacuum conditions, and then remove moisture through sublimation, ultimately forming a loose and porous freeze-dried form (commonly seen in freeze-dried masks, freeze-dried serums, and freeze-dried creams). These products can be used either by 'preparing and using immediately' (dissolving in water) or directly on the face, maximizing the purity and efficacy of active ingredients. They also eliminate the need for preservatives, fragrances, and other harmful additives, making them gentle and suitable for sensitive skin. The freeze-dried form facilitates storage and transportation, reducing the loss of active ingredients. Early trial data shows that freeze-dried cosmetics retain 60%-80% more active ingredients than traditional cosmetics, and their skincare efficacy decays more than 50% faster. Since its initial development and commercialization by European and American companies in the 1990s, freeze-dried cosmetics, with their high efficacy, gentleness, and environmental friendliness, have

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evolved from a niche innovation into a rapidly growing segment in the global beauty industry. Currently, the freeze-dried cosmetic product range covers multiple categories, including facial care, eye care, and body care, widely adaptable to various skincare needs such as sensitive skin, problem skin, and anti-aging requirements.

In 2025, the global freeze-dried cosmetics market will exhibit significant price variations due to differences in product type, active ingredient purity, and technological processes: general-purpose freeze-dried cosmetics (such as basic hydrating freeze-dried masks) cater to ordinary skincare needs, with an average price of approximately $5-12 per unit; high-end, high-efficiency freeze-dried cosmetics (such as freeze-dried essences containing peptides and probiotics, and anti-aging freeze-dried masks) cater to high-end skincare needs, with an average price of $15-38 per unit; and medical-grade freeze-dried cosmetics (such as post-operative repair freeze-dried dressings) cater to medical skincare scenarios, with an average price of $40-70 per unit. In terms of production capacity, the industry exhibits a 'regional concentration and polarization' characteristic, with major global production capacity concentrated in East Asia (China, Japan, and South Korea), North America (the United States), and Europe (France and Germany). The annual production capacity of a single production line is approximately 3.5-4 million units, with an average industry capacity utilization rate of approximately 88% and an average product gross profit margin of 23.7%, among which high-end medical-grade freeze-dried cosmetics have a gross profit margin of 28%-32%. Supplementary data shows that China, as the world's largest producer and consumer of freeze-dried cosmetics, accounted for 42.3% of the global market size in 2025. Leading domestic companies such as Fu'erjia and Weibao Haitai contributed over 35% of the domestic market sales.

Typical Transaction Case: In the second quarter of 2025, a large chain beauty retailer purchased freeze-dried cosmetics from three companies: Fu'erjia, WINONA, and OxygenCeuticals. Specifically, Fu'erjia purchased 8 million units of the FJG-2025 freeze-dried repair mask, with a contract value of approximately US$320 million; WINONA purchased 3 million units of the WN-800 freeze-dried soothing essence, with a contract value of approximately US$144 million; and OxygenCeuticals purchased 1.5 million units of the OC-700 medical freeze-dried repair dressing, with a contract value of approximately US$105 million. The total contract value reached US$569 million. The procurement technical requirements include: 'Product active ingredient retention rate ?85%, no preservatives, fragrances, or alcohol added, complying with relevant standards of the National Cosmetics Classification Rules and Catalog and medical-grade cosmetics production specifications; freeze-dried form is loose and porous, dissolving time in water ?30 seconds, with no precipitation or clumping after dissolution;

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clear skincare efficacy (Fu'erjia products must meet sensitive skin repair effect ?90%, WINONA products must meet soothing and calming effect ?88%, OxygenCeuticals products must meet post-operative redness reduction rate ?85%); products must pass ISO22716 Good Manufacturing Practice (GMP) certification for cosmetics, EU ECOCERT natural organic certification, and some medical-grade products must pass US FDA certification; packaging must use biodegradable and environmentally friendly materials, suitable for chain retail shelf display and online logistics transportation, with a shelf life ?3 years (under vacuum sealing conditions).' Furthermore, in a 2025 government procurement project, the medical skincare product category explicitly required that the manufacturers of the freeze-dried products submitted by bidders possess a 'People's Republic of China Cosmetics Production License,' further reflecting the stringent industry compliance requirements.

Industry Pain Points: The fundamental pain point of the freeze-dried cosmetics industry is the multiple contradictions between its high efficacy and high cost product attributes and consumers' demand for cost-effectiveness, global beauty industry compliance and regulation, regional competitive landscape, and technological barriers. The core pain points are specifically manifested as follows: On the product side, core technological barriers are concentrated in the fields of high-end medical-grade and high-efficiency skincare products. Key technologies such as the targeted retention of active ingredients, optimization of low-temperature freeze-drying processes, aseptic production technology, and long-term stability control of high-end freeze-dried cosmetics are dominated by a few leading overseas companies (such as OxygenCeuticals, Phytomer, and SynerLab). Domestic companies lag behind in the stability of active ingredients and the durability of efficacy in high-end products (for example, under normal storage conditions, the rate of active ingredient decay in freeze-dried products from ordinary domestic manufacturers is 20%-30% faster than that of similar products from OxygenCeuticals, and the precision of freeze-drying processes in high-end products is about 15%-25%). At the same time, some small and medium-sized manufacturers have serious problems with product design homogenization and cutting corners, such as reducing the amount of active ingredients added and using simplified freeze-drying processes instead of vacuum freeze-drying, resulting in products with unsatisfactory efficacy, slow dissolution speed, poor user experience, and even allergic reactions, which lowers the overall reputation of the industry and limits the penetration of the high-end market. Furthermore, some companies suffer from insufficient product innovation, focusing primarily on conventional categories like freeze-dried masks. They invest insufficiently in R&D for niche categories such as freeze-dried serums and creams, and some products exhibit 'pseudo-freeze-dried' characteristics, misleading consumers. It's worth noting that freeze-dried cosmetics have a high dependence on core ingredients. For example, high-

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end products often rely on imports for specialized probiotics and imported plant extracts, further increasing production costs and technological challenges for domestic companies. There is still significant room for improvement in the in-depth development and application of natural ingredients like Gutian tremella.

On the market and regulatory front, global beauty compliance standards continue to upgrade. Standards such as the International Cosmetic Regulatory Cooperation (ICCR), the EU's Cosmetics Regulation (EC) 1223/2009, and China's Regulations on the Supervision and Administration of Cosmetics and the Rules and Catalogs for the Classification of Cosmetics impose stringent requirements on the labeling of active ingredients, production processes, aseptic requirements, and the use of preservatives for freeze-dried cosmetics. Due to a lack of core technologies and financial support, domestic SMEs struggle to meet the compliance indicators for high-end skincare and medical-grade applications. Upgrading to compliance requires significant investment and is costly, with some SMEs even facing the risk of being eliminated. The market exhibits a typical pattern of 'concentration of leading companies and fierce competition in the low-to-mid-end market.' The global market is mainly dominated by leading companies in East Asia, North America, and Europe, while the domestic market is dominated by companies in Shanghai, Guangdong, and Zhejiang. Small and medium-sized manufacturers in these regions are caught in a price war, with profit margins per unit compressed to 5%-10%. Meanwhile, overseas brands have a first-mover advantage in the high-end market, while domestic companies are at a disadvantage in terms of brand influence, high-end channel layout, and international certification system construction, further compressing profit margins and innovation motivation. Furthermore, consumer perceptions of freeze-dried cosmetics remain flawed. Some consumers confuse 'freeze-drying' with 'conventional drying' technology, and there is a divergence in their acceptance of product efficacy and price, which also hinders the industry's rapid adoption.

The upstream of the freeze-dried cosmetics industry chain encompasses core materials (active ingredients such as peptides, probiotics, and plant extracts, with European, American, and Japanese companies dominating high-end active ingredients, while domestic companies have a significant advantage in plant extracts, such as the Fujian Gutian Tremella extract; freeze-drying matrix materials such as maltodextrin and mannitol, with China and the United States being the main suppliers; packaging materials mainly consisting of vacuum-sealed and biodegradable packaging, with German and Chinese companies dominating the high-end packaging sector; preservative auxiliary materials such as plant essential oils, with French and Italian companies dominating), key components/auxiliaries (core components of freeze-drying

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equipment such as compressors and condensers, with German and Japanese equipment accounting for a high proportion but gradually being replaced by domestic equipment; dissolving aids suitable for sensitive skin; aseptic packaging components and testing reagents) and technical support (vacuum freeze-drying technology, active ingredient directional retention technology, aseptic production technology, etc., with collaborative research and development between universities and research institutions and enterprises, such as the Chinese Academy of Sciences and Jiangnan University collaborating with Weibao Haitai and Fu'erjia, and the National Medical Products Administration's 'Cosmetic Classification Rules and Classification Catalog' providing compliance guidance). Downstream applications include online e-commerce (58%), driven by platforms like Tmall, JD.com, and Douyin, with live-streaming sales boosting annual growth by over 25%. The 18-35 age group accounts for 72% of sales, and brands like Fu'erjia and Natural Melody have online sales exceeding 70%. Offline beauty retail accounts for 22%, focusing on first- and second-tier cities, with high-end products achieving high penetration rates in physical stores. Brands like Herborist and Phytomer have offline sales exceeding 45%. Medical aesthetic institutions account for 12%, used for post-medical aesthetic procedures, dominated by brands like WeberTech and OxygenCeuticals, with annual demand growth of 30%. Other sectors account for 8%, including pharmacies (medical-grade products growing 28% annually), high-end spas, cross-border e-commerce (exports to Southeast Asia and Europe growing 22% annually), and government procurement, forming a significant growth driver.

Industry Trends and Challenges: The development trend of freeze-dried cosmetics presents four main directions: premiumization and efficacy (the market share of high-end/medical-grade products will reach 48% by 2032, with anti-aging and repair products becoming the mainstay), convenience and diversification (the popularization of instant/no-dissolve products, with product categories extending to niche scenarios such as eye care and body care), greening and sustainability (water saving of 70%+, promotion of biodegradable packaging), and accelerated domestic substitution (domestic market penetration is expected to reach 85% by 2032). On the opportunity side, the global natural and organic beauty market will reach US$58 billion in 2025 (freeze-dried products accounting for approximately 15%), with the domestic market at US$3.69 billion. There is a demand gap of 120 million units per year for post-medical aesthetic repair products, and policy support and technological iteration are driving cost reduction. Challenges include a 45% import dependence on high-end core technologies (active ingredient retention/stability control) and equipment, the proliferation of 'pseudo-freeze-dried' products due to imperfect industry standards, consumer misconceptions and technological barriers of overseas brands, and cost pressures from fluctuations in the prices of high-end raw materials/equipment. These challenges require

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breakthroughs through technological innovation, standard improvement, market education, and supply chain optimization.

Demand and Business Opportunity Analysis: Freeze-dried cosmetics are driven by significant demand and technological advantages: On the demand side, the upgrading of global skincare needs is driving demand for high-efficacy and gentle products. The market for sensitive skin and anti-aging products is expanding. The trend towards natural and organic beauty products, with their preservative-free and highly active ingredient retention characteristics, aligns with demand. Post-medical aesthetic repair scenarios are driving an annual demand of 180 million medical-grade freeze-dried products. Policy regulations and technological iterations are reducing costs and expanding the consumer base. On the technology side, the products are suitable for various skin types, including sensitive and problem skin, and for various scenarios, including daily and medical aesthetic treatments, with a coverage rate exceeding 90%. High retention of active ingredients improves efficacy by 60%-80%, and the shelf life is over 3 years. Rapid dissolution technology reduces dissolution time to within 30 seconds. Accelerated domestic substitution is increasing the success rate of domestic companies in bidding, expanding their global market share. The advantage of being suitable for Chinese consumers' skin types further strengthens market competitiveness.

This report studies the global Freeze Dried Cosmetic Product production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Freeze Dried Cosmetic Product and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Freeze Dried Cosmetic Product that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Freeze Dried Cosmetic Product total production and demand, 2021-2032, (K Units)
Global Freeze Dried Cosmetic Product total production value, 2021-2032, (USD Million)
Global Freeze Dried Cosmetic Product production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)
Global Freeze Dried Cosmetic Product consumption by region & country, CAGR, 2021-2032 & (K Units)
U.S. VS China: Freeze Dried Cosmetic Product domestic production, consumption, key domestic manufacturers and share

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Global Freeze Dried Cosmetic Product production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)
Global Freeze Dried Cosmetic Product production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)
Global Freeze Dried Cosmetic Product production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Freeze Dried Cosmetic Product market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Weibo Haitai, Shanghai Jahwa Union, Saro de R?e, Beauty Pie, Phytomer, UpCircle, OxygenCeuticals, Reviva Labs, KOKEN cosmetic, Daejong Medical, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Freeze Dried Cosmetic Product market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Units) and average price (US$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Freeze Dried Cosmetic Product Market, By Region:

United States

China

Europe

Japan

South Korea

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ASEAN

India

Rest of World

Global Freeze Dried Cosmetic Product Market, Segmentation by Type:

Freeze-dried Masks

Freeze-dried Serums

Freeze-dried Creams/Lotions

Others

Global Freeze Dried Cosmetic Product Market, Segmentation by Efficacy:

Repairing

Anti-aging

Hydrating & Moisturizing

Whitening

Global Freeze Dried Cosmetic Product Market, Segmentation by Regulatory Attributes:

Key Electrical Parameters

Environmental Parameter Monitoring

Global Freeze Dried Cosmetic Product Market, Segmentation by Application:

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Online E-commerce

Offline Beauty Retail

Medical Aesthetic Institutions

Others

Companies Profiled:

Weibo Haitai

Shanghai Jahwa Union

Saro de R?e

Beauty Pie

Phytomer

UpCircle

OxygenCeuticals

Reviva Labs

KOKEN cosmetic

Daejong Medical

Georgia Louise

Lipostides

WINONA

UNES

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YUE-SAI

Haiben

Natural Melody

Fuerjia

LANTERN

Key Questions Answered:

1. How big is the global Freeze Dried Cosmetic Product market?
2. What is the demand of the global Freeze Dried Cosmetic Product market?
3. What is the year over year growth of the global Freeze Dried Cosmetic Product market?
4. What is the production and production value of the global Freeze Dried Cosmetic Product market?
5. Who are the key producers in the global Freeze Dried Cosmetic Product market?
6. What are the growth factors driving the market demand?

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