

Global Natural Plant-Based Emollients Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Natural Plant-Based Emollients market size is expected to reach \$ 5987 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

Natural plant-based emollients are skin-conditioning ingredients primarily derived from plant oils, plant waxes, plant sterols, plant squalane, plant-derived fatty acid esters, plant extracts, and natural plant lipids. They function primarily by replenishing skin lipids, forming a soft protective film, improving skin feel, reducing transepidermal water loss, and enhancing formula spreadability. These emollients are widely utilized in products such as face creams, lotions, serums, body care items, lip care products, infant and child care lines, sunscreens, cosmetics, and cleansing products. In 2025, the global sales volume of natural plant-based emollients is projected to reach approximately 1.186 million tons, with an average unit price of approximately \$3,260 per ton and a capacity utilization rate of approximately 73%. Upstream enterprises in the industry primarily encompass sectors such as oilseed cultivation, oil pressing, natural wax extraction, plant extraction, fatty acid esterification, refining (including decolorization and deodorization), natural surfactants, packaging materials, and testing and certification services. Downstream enterprises mainly consist of cosmetic ingredient distributors, skincare brands, personal care manufacturers, cosmetics companies, infant and child care brands, cleansing product manufacturers, contract manufacturers, and natural and organic care brands; the industry's average gross profit margin stands at approximately 32%. Regarding the product cost structure, plant oils and natural lipid raw materials account for approximately 39%; extraction, refining, and esterification processing account for about 18%; quality testing and efficacy validation account for about 8%; organic and sustainability certifications account for about 6%; packaging, storage, and transportation account for about 7%; formula development and technical

services account for about 9%; labor and manufacturing overhead account for about 6%; and R&D, quality assurance, and after-sales services account for about 7%. The list of downstream demand encompasses the development of natural skincare formulations, sensitive skin care, gentle care for infants and children, moisturizing body care, lip repair, natural makeup bases, sensory enhancement for sunscreens, conditioning and moisturizing agents for hair and body care, silicone-free alternatives, and high-performance oil-phase systems for premium skincare. The roster of downstream clients includes L'Oréal, Estée Lauder, Unilever, P&G, Shiseido, Beiersdorf, Coty, Kao, Cosmax, Kolmar, Shanghai Jahwa, Proya, Botanée, Bloomage Biotech, Shangmei, Marubi, Yatsen, and various natural and organic skincare brands. In terms of business opportunities, policy-driven growth stems from regulations regarding cosmetic ingredient safety management, green chemistry, sustainable sourcing, alternative testing methods (replacing animal testing), and standards for natural and organic certification. Technological innovation is driven by advancements in the fermentation and bioconversion of plant-derived squalane, low-odor refining processes, stable antioxidant systems, esterification technologies for lightweight skin feel, microstructural modification of plant waxes, and traceable supply chains. Meanwhile, shifting consumer demands are reflected in a heightened focus on natural origins, gentle and low-irritation formulations, lightweight textures, sustainable cultivation, 'clean label' ingredients, sensitivity-friendly products, and environmental responsibility.

Market demand for natural plant-based emollients is evolving from a focus on merely 'conceptually natural' ingredients toward functional ingredients characterized by high stability, superior sensorial properties, and sustainable supply chains. This shift is driven by the increasing emphasis placed by brands across skincare, color cosmetics, baby care, and body care sectors on natural origins, mildness, and eco-friendly attributes. Historically, plant-based oils and fats primarily served a basic moisturizing function; however, as consumer expectations regarding sensorial experience and ingredient transparency have risen, brands are now prioritizing factors such as oxidative stability, odor control, lightness of skin feel, non-comedogenicity, hypoallergenic properties, and supply chain traceability. By 2025, industry competition is expected to center on high-purity plant-derived squalane, plant-sourced fatty acid esters, modified natural waxes, organically certified plant oils, and low-irritation emollient systems tailored for sensitive skin formulations. While standard commodity plant oils face intense price competition, high-end natural emollients rely more heavily on secure sourcing, advanced refining technologies, and brand certification capabilities. International ingredient suppliers hold distinct advantages in sustainable certification, access to multinational clientele, and formulation technical support services; meanwhile, Chinese enterprises are continuously enhancing their competitiveness in plant resource development, rapid

response to domestic brands, cost control, and ingredient compounding expertise. Future growth opportunities are expected to emerge primarily from the 'clean beauty' movement, sensitive skin care, baby care, high-efficacy premium skincare, the upgrading of domestic Chinese brands, and the expansion of natural emollient systems designed to replace silicones. However, the industry also faces challenges such as price volatility in plant-based raw materials, supply disruptions caused by climate change, batch-to-batch inconsistency in natural ingredients, regulatory risks stemming from exaggerated marketing claims, and issues regarding the oxidative degradation of certain plant oils. Overall, natural plant-based emollients are no longer merely traditional fatty ingredients; rather, they are evolving into essential foundational components in cosmetic formulations?delivering a synergistic blend of superior sensorial qualities, functional efficacy, safety, and sustainability. Consequently, a trajectory toward premiumization, a lighter skin feel, and enhanced traceability will define the primary directions for future product upgrades within this sector.

This report studies the global Natural Plant-Based Emollients production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Natural Plant-Based Emollients 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 Natural Plant-Based Emollients that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Natural Plant-Based Emollients total production and demand, 2021-2032, (Ton)

Global Natural Plant-Based Emollients total production value, 2021-2032, (USD Million)

Global Natural Plant-Based Emollients production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Ton), (based on production site)

Global Natural Plant-Based Emollients consumption by region & country, CAGR, 2021-2032 & (Ton)

U.S. VS China: Natural Plant-Based Emollients domestic production, consumption, key domestic manufacturers and share

Global Natural Plant-Based Emollients production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Ton)

Global Natural Plant-Based Emollients production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Ton)

Global Natural Plant-Based Emollients production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Ton)

This report profiles key players in the global Natural Plant-Based Emollients 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 BASF?DE?, Ashland?US?, Clariant?CH?, Amyris?US?, Solvay?BE?, Lubrizol?US?, Evonik?DE?, Vantage?US?, Stepan?US?, Innospec?US?, 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 Natural Plant-Based Emollients market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Ton) and average price (US\$/Ton) 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 Natural Plant-Based Emollients Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Natural Plant-Based Emollients Market, Segmentation by Type:

Aloe Vera

Squalane

Jojoba Oil

Ricinus Communis Seed Oil

Shea Butter

Other

Global Natural Plant-Based Emollients Market, Segmentation by Source Material:

Plant Oil-Based Emollients

Plant Extract-Based Emollients

Natural Plant Lipid Emollients

Others

Global Natural Plant-Based Emollients Market, Segmentation by Water Content:

>5%

5%-20%

>20%

Global Natural Plant-Based Emollients Market, Segmentation by Application:

Skin Care

Hair Care

Other

Companies Profiled:

BASF?DE?

Ashland?US?

Clariant?CH?

Amyris?US?

Solvay?BE?

Lubrizol?US?

Evonik?DE?

Vantage?US?

Stepan?US?

Innospec?US?

Sonneborn?US?

Sophim?FR?

Seppic?FR?

Croda?GB?

Inolex?US?

IOI Oleo GmbH?DE?

AAK?SE?

Bioelixire?PL?

Nowvi?US?

Lachemi Chemorgs?IN?

Patech Fine Chemicals?TW?

Anhui Huaheng Biotechnology?CN?

Key Questions Answered:

1. How big is the global Natural Plant-Based Emollients market?
2. What is the demand of the global Natural Plant-Based Emollients market?
3. What is the year over year growth of the global Natural Plant-Based Emollients market?
4. What is the production and production value of the global Natural Plant-Based Emollients market?
5. Who are the key producers in the global Natural Plant-Based Emollients market?
6. What are the growth factors driving the market demand?

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