

Global Cosmetics OEM and ODM Market Growth (Status and Outlook) 2025-2031

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Abstracts

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The global FIB-SEM System market size is predicted to grow from US\$ 644 million in 2025 to US\$ 910 million in 2031; it is expected to grow at a CAGR of 5.9% from 2025 to 2031.

The FIB-SEM system is an electron microscope system that integrates focused electron beams and scanning ion beams. Focused ion beams can be used for micro processing of samples, scanning electron beams can be used for micro imaging and 'two-dimensional' characterization analysis of sample surface morphology, and real-time observation of the FIB processing process. Therefore, the FIB-SEM system can achieve fixed-point etching, deposition, cross-sectional cutting, TEM electron microscopy sample preparation, and micro/nano device preparation of samples Circuit repair, 3D structural characterization, etc.

Global key players of FIB-SEM System include Thermo Fisher Scientific Hitachi and Zeiss, etc. The top three players hold a share over 85%. Japan is the largest market. In terms of product type, Ga Ion Source is the largest segment, occupied for a share of 95%, and in terms of application, Material Science has a share about 40 percent.

Analysis of FIB-SEM system market drivers

1. Demand for semiconductor technology iteration

Advanced process node promotion:

3nm/2nm chip process requires atomic-level defect detection, and FIB-SEM supports nanoscale circuit editing and material composition analysis (such as EDS/EBSD integration) to help improve yield.

3D packaging technology (such as Chiplet) relies on FIB-SEM for through-silicon via (TSV) cross-sectional analysis and interface defect positioning.

Semiconductor material innovation:

The microstructure research of third-generation semiconductors (GaN, SiC) and two-dimensional materials (graphene) requires FIB-SEM to achieve atomic-level resolution imaging (

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Cosmetics OEM and ODM Market Size (2020-2031)
 - 2.1.2 Cosmetics OEM and ODM Market Size CAGR by Region (2020 VS 2024 VS 2031)
 - 2.1.3 World Current & Future Analysis for Cosmetics OEM and ODM by Country/Region (2020, 2024 & 2031)
- 2.2 Cosmetics OEM and ODM Segment by Type
 - 2.2.1 Cosmetics OEM
 - 2.2.2 Cosmetics ODM
- 2.3 Cosmetics OEM and ODM Market Size by Type
 - 2.3.1 Cosmetics OEM and ODM Market Size CAGR by Type (2020 VS 2024 VS 2031)
 - 2.3.2 Global Cosmetics OEM and ODM Market Size Market Share by Type (2020-2025)
- 2.4 Cosmetics OEM and ODM Segment by Application
 - 2.4.1 Skincare
 - 2.4.2 Haircare
 - 2.4.3 Makeup
 - 2.4.4 Others
- 2.5 Cosmetics OEM and ODM Market Size by Application
 - 2.5.1 Cosmetics OEM and ODM Market Size CAGR by Application (2020 VS 2024 VS 2031)
 - 2.5.2 Global Cosmetics OEM and ODM Market Size Market Share by Application (2020-2025)

3 COSMETICS OEM AND ODM MARKET SIZE BY PLAYER

3.1 Cosmetics OEM and ODM Market Size Market Share by Player

3.1.1 Global Cosmetics OEM and ODM Revenue by Player (2020-2025)

3.1.2 Global Cosmetics OEM and ODM Revenue Market Share by Player (2020-2025)

3.2 Global Cosmetics OEM and ODM Key Players Head office and Products Offered

3.3 Market Concentration Rate Analysis

3.3.1 Competition Landscape Analysis

3.3.2 Concentration Ratio (CR3, CR5 and CR10) & (2023-2025)

3.4 New Products and Potential Entrants

3.5 Mergers & Acquisitions, Expansion

4 COSMETICS OEM AND ODM BY REGION

4.1 Cosmetics OEM and ODM Market Size by Region (2020-2025)

4.2 Global Cosmetics OEM and ODM Annual Revenue by Country/Region (2020-2025)

4.3 Americas Cosmetics OEM and ODM Market Size Growth (2020-2025)

4.4 APAC Cosmetics OEM and ODM Market Size Growth (2020-2025)

4.5 Europe Cosmetics OEM and ODM Market Size Growth (2020-2025)

4.6 Middle East & Africa Cosmetics OEM and ODM Market Size Growth (2020-2025)

5 AMERICAS

5.1 Americas Cosmetics OEM and ODM Market Size by Country (2020-2025)

5.2 Americas Cosmetics OEM and ODM Market Size by Type (2020-2025)

5.3 Americas Cosmetics OEM and ODM Market Size by Application (2020-2025)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Cosmetics OEM and ODM Market Size by Region (2020-2025)

6.2 APAC Cosmetics OEM and ODM Market Size by Type (2020-2025)

6.3 APAC Cosmetics OEM and ODM Market Size by Application (2020-2025)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

7 EUROPE

7.1 Europe Cosmetics OEM and ODM Market Size by Country (2020-2025)

7.2 Europe Cosmetics OEM and ODM Market Size by Type (2020-2025)

7.3 Europe Cosmetics OEM and ODM Market Size by Application (2020-2025)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Cosmetics OEM and ODM by Region (2020-2025)

8.2 Middle East & Africa Cosmetics OEM and ODM Market Size by Type (2020-2025)

8.3 Middle East & Africa Cosmetics OEM and ODM Market Size by Application
(2020-2025)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 GLOBAL COSMETICS OEM AND ODM MARKET FORECAST

10.1 Global Cosmetics OEM and ODM Forecast by Region (2026-2031)

10.1.1 Global Cosmetics OEM and ODM Forecast by Region (2026-2031)

10.1.2 Americas Cosmetics OEM and ODM Forecast

10.1.3 APAC Cosmetics OEM and ODM Forecast

- 10.1.4 Europe Cosmetics OEM and ODM Forecast
- 10.1.5 Middle East & Africa Cosmetics OEM and ODM Forecast
- 10.2 Americas Cosmetics OEM and ODM Forecast by Country (2026-2031)
 - 10.2.1 United States Market Cosmetics OEM and ODM Forecast
 - 10.2.2 Canada Market Cosmetics OEM and ODM Forecast
 - 10.2.3 Mexico Market Cosmetics OEM and ODM Forecast
 - 10.2.4 Brazil Market Cosmetics OEM and ODM Forecast
- 10.3 APAC Cosmetics OEM and ODM Forecast by Region (2026-2031)
 - 10.3.1 China Cosmetics OEM and ODM Market Forecast
 - 10.3.2 Japan Market Cosmetics OEM and ODM Forecast
 - 10.3.3 Korea Market Cosmetics OEM and ODM Forecast
 - 10.3.4 Southeast Asia Market Cosmetics OEM and ODM Forecast
 - 10.3.5 India Market Cosmetics OEM and ODM Forecast
 - 10.3.6 Australia Market Cosmetics OEM and ODM Forecast
- 10.4 Europe Cosmetics OEM and ODM Forecast by Country (2026-2031)
 - 10.4.1 Germany Market Cosmetics OEM and ODM Forecast
 - 10.4.2 France Market Cosmetics OEM and ODM Forecast
 - 10.4.3 UK Market Cosmetics OEM and ODM Forecast
 - 10.4.4 Italy Market Cosmetics OEM and ODM Forecast
 - 10.4.5 Russia Market Cosmetics OEM and ODM Forecast
- 10.5 Middle East & Africa Cosmetics OEM and ODM Forecast by Region (2026-2031)
 - 10.5.1 Egypt Market Cosmetics OEM and ODM Forecast
 - 10.5.2 South Africa Market Cosmetics OEM and ODM Forecast
 - 10.5.3 Israel Market Cosmetics OEM and ODM Forecast
 - 10.5.4 Turkey Market Cosmetics OEM and ODM Forecast
- 10.6 Global Cosmetics OEM and ODM Forecast by Type (2026-2031)
- 10.7 Global Cosmetics OEM and ODM Forecast by Application (2026-2031)
 - 10.7.1 GCC Countries Market Cosmetics OEM and ODM Forecast

11 KEY PLAYERS ANALYSIS

- 11.1 KDC/One
 - 11.1.1 KDC/One Company Information
 - 11.1.2 KDC/One Cosmetics OEM and ODM Product Offered
 - 11.1.3 KDC/One Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.1.4 KDC/One Main Business Overview
 - 11.1.5 KDC/One Latest Developments
- 11.2 COSMAX

- 11.2.1 COSMAX Company Information
- 11.2.2 COSMAX Cosmetics OEM and ODM Product Offered
- 11.2.3 COSMAX Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
- 11.2.4 COSMAX Main Business Overview
- 11.2.5 COSMAX Latest Developments
- 11.3 Intercos
 - 11.3.1 Intercos Company Information
 - 11.3.2 Intercos Cosmetics OEM and ODM Product Offered
 - 11.3.3 Intercos Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.3.4 Intercos Main Business Overview
 - 11.3.5 Intercos Latest Developments
- 11.4 Kolmar Korea
 - 11.4.1 Kolmar Korea Company Information
 - 11.4.2 Kolmar Korea Cosmetics OEM and ODM Product Offered
 - 11.4.3 Kolmar Korea Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.4.4 Kolmar Korea Main Business Overview
 - 11.4.5 Kolmar Korea Latest Developments
- 11.5 TOA
 - 11.5.1 TOA Company Information
 - 11.5.2 TOA Cosmetics OEM and ODM Product Offered
 - 11.5.3 TOA Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.5.4 TOA Main Business Overview
 - 11.5.5 TOA Latest Developments
- 11.6 Cosmo Beauty
 - 11.6.1 Cosmo Beauty Company Information
 - 11.6.2 Cosmo Beauty Cosmetics OEM and ODM Product Offered
 - 11.6.3 Cosmo Beauty Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.6.4 Cosmo Beauty Main Business Overview
 - 11.6.5 Cosmo Beauty Latest Developments
- 11.7 Cosmecca
 - 11.7.1 Cosmecca Company Information
 - 11.7.2 Cosmecca Cosmetics OEM and ODM Product Offered
 - 11.7.3 Cosmecca Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)

- 11.7.4 Cosmecca Main Business Overview
- 11.7.5 Cosmecca Latest Developments
- 11.8 Mana Products
 - 11.8.1 Mana Products Company Information
 - 11.8.2 Mana Products Cosmetics OEM and ODM Product Offered
 - 11.8.3 Mana Products Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.8.4 Mana Products Main Business Overview
 - 11.8.5 Mana Products Latest Developments
- 11.9 Nox Bellow Cosmetics
 - 11.9.1 Nox Bellow Cosmetics Company Information
 - 11.9.2 Nox Bellow Cosmetics Cosmetics OEM and ODM Product Offered
 - 11.9.3 Nox Bellow Cosmetics Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.9.4 Nox Bellow Cosmetics Main Business Overview
 - 11.9.5 Nox Bellow Cosmetics Latest Developments
- 11.10 PICASO Cosmetic
 - 11.10.1 PICASO Cosmetic Company Information
 - 11.10.2 PICASO Cosmetic Cosmetics OEM and ODM Product Offered
 - 11.10.3 PICASO Cosmetic Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.10.4 PICASO Cosmetic Main Business Overview
 - 11.10.5 PICASO Cosmetic Latest Developments
- 11.11 Toyo Beauty
 - 11.11.1 Toyo Beauty Company Information
 - 11.11.2 Toyo Beauty Cosmetics OEM and ODM Product Offered
 - 11.11.3 Toyo Beauty Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.11.4 Toyo Beauty Main Business Overview
 - 11.11.5 Toyo Beauty Latest Developments
- 11.12 Cohere Beauty
 - 11.12.1 Cohere Beauty Company Information
 - 11.12.2 Cohere Beauty Cosmetics OEM and ODM Product Offered
 - 11.12.3 Cohere Beauty Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.12.4 Cohere Beauty Main Business Overview
 - 11.12.5 Cohere Beauty Latest Developments
- 11.13 S&J
 - 11.13.1 S&J Company Information

- 11.13.2 S&J Cosmetics OEM and ODM Product Offered
- 11.13.3 S&J Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
- 11.13.4 S&J Main Business Overview
- 11.13.5 S&J Latest Developments
- 11.14 Ancorotti Cosmetics
 - 11.14.1 Ancorotti Cosmetics Company Information
 - 11.14.2 Ancorotti Cosmetics Cosmetics OEM and ODM Product Offered
 - 11.14.3 Ancorotti Cosmetics Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.14.4 Ancorotti Cosmetics Main Business Overview
 - 11.14.5 Ancorotti Cosmetics Latest Developments
- 11.15 A&H International Cosmetics
 - 11.15.1 A&H International Cosmetics Company Information
 - 11.15.2 A&H International Cosmetics Cosmetics OEM and ODM Product Offered
 - 11.15.3 A&H International Cosmetics Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.15.4 A&H International Cosmetics Main Business Overview
 - 11.15.5 A&H International Cosmetics Latest Developments
- 11.16 Chromavis
 - 11.16.1 Chromavis Company Information
 - 11.16.2 Chromavis Cosmetics OEM and ODM Product Offered
 - 11.16.3 Chromavis Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.16.4 Chromavis Main Business Overview
 - 11.16.5 Chromavis Latest Developments
- 11.17 Opal Cosmetics
 - 11.17.1 Opal Cosmetics Company Information
 - 11.17.2 Opal Cosmetics Cosmetics OEM and ODM Product Offered
 - 11.17.3 Opal Cosmetics Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.17.4 Opal Cosmetics Main Business Overview
 - 11.17.5 Opal Cosmetics Latest Developments
- 11.18 Milott
 - 11.18.1 Milott Company Information
 - 11.18.2 Milott Cosmetics OEM and ODM Product Offered
 - 11.18.3 Milott Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.18.4 Milott Main Business Overview

- 11.18.5 Milott Latest Developments
- 11.19 B.Kolor
 - 11.19.1 B.Kolor Company Information
 - 11.19.2 B.Kolor Cosmetics OEM and ODM Product Offered
 - 11.19.3 B.Kolor Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.19.4 B.Kolor Main Business Overview
 - 11.19.5 B.Kolor Latest Developments
- 11.20 BioTruly
 - 11.20.1 BioTruly Company Information
 - 11.20.2 BioTruly Cosmetics OEM and ODM Product Offered
 - 11.20.3 BioTruly Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.20.4 BioTruly Main Business Overview
 - 11.20.5 BioTruly Latest Developments
- 11.21 Cosway
 - 11.21.1 Cosway Company Information
 - 11.21.2 Cosway Cosmetics OEM and ODM Product Offered
 - 11.21.3 Cosway Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.21.4 Cosway Main Business Overview
 - 11.21.5 Cosway Latest Developments
- 11.22 Bawei Biotechnology
 - 11.22.1 Bawei Biotechnology Company Information
 - 11.22.2 Bawei Biotechnology Cosmetics OEM and ODM Product Offered
 - 11.22.3 Bawei Biotechnology Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.22.4 Bawei Biotechnology Main Business Overview
 - 11.22.5 Bawei Biotechnology Latest Developments
- 11.23 Ridgepole
 - 11.23.1 Ridgepole Company Information
 - 11.23.2 Ridgepole Cosmetics OEM and ODM Product Offered
 - 11.23.3 Ridgepole Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)
 - 11.23.4 Ridgepole Main Business Overview
 - 11.23.5 Ridgepole Latest Developments
- 11.24 ANTE (Suzhou) Cosmetics
 - 11.24.1 ANTE (Suzhou) Cosmetics Company Information
 - 11.24.2 ANTE (Suzhou) Cosmetics Cosmetics OEM and ODM Product Offered

11.24.3 ANTE (Suzhou) Cosmetics Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)

11.24.4 ANTE (Suzhou) Cosmetics Main Business Overview

11.24.5 ANTE (Suzhou) Cosmetics Latest Developments

11.25 ESTATE CHEMICAL

11.25.1 ESTATE CHEMICAL Company Information

11.25.2 ESTATE CHEMICAL Cosmetics OEM and ODM Product Offered

11.25.3 ESTATE CHEMICAL Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)

11.25.4 ESTATE CHEMICAL Main Business Overview

11.25.5 ESTATE CHEMICAL Latest Developments

11.26 Ya Pure Cosmetics

11.26.1 Ya Pure Cosmetics Company Information

11.26.2 Ya Pure Cosmetics Cosmetics OEM and ODM Product Offered

11.26.3 Ya Pure Cosmetics Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)

11.26.4 Ya Pure Cosmetics Main Business Overview

11.26.5 Ya Pure Cosmetics Latest Developments

11.27 Jiangsu Meiaisi Cosmetics

11.27.1 Jiangsu Meiaisi Cosmetics Company Information

11.27.2 Jiangsu Meiaisi Cosmetics Cosmetics OEM and ODM Product Offered

11.27.3 Jiangsu Meiaisi Cosmetics Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)

11.27.4 Jiangsu Meiaisi Cosmetics Main Business Overview

11.27.5 Jiangsu Meiaisi Cosmetics Latest Developments

11.28 Homar

11.28.1 Homar Company Information

11.28.2 Homar Cosmetics OEM and ODM Product Offered

11.28.3 Homar Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)

11.28.4 Homar Main Business Overview

11.28.5 Homar Latest Developments

11.29 Foshan Wanying Cosmetics

11.29.1 Foshan Wanying Cosmetics Company Information

11.29.2 Foshan Wanying Cosmetics Cosmetics OEM and ODM Product Offered

11.29.3 Foshan Wanying Cosmetics Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)

11.29.4 Foshan Wanying Cosmetics Main Business Overview

11.29.5 Foshan Wanying Cosmetics Latest Developments

11.30 Easycare Group

11.30.1 Easycare Group Company Information

11.30.2 Easycare Group Cosmetics OEM and ODM Product Offered

11.30.3 Easycare Group Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)

11.30.4 Easycare Group Main Business Overview

11.30.5 Easycare Group Latest Developments

11.31 Life-Beauty

11.31.1 Life-Beauty Company Information

11.31.2 Life-Beauty Cosmetics OEM and ODM Product Offered

11.31.3 Life-Beauty Cosmetics OEM and ODM Revenue, Gross Margin and Market Share (2020-2025)

11.31.4 Life-Beauty Main Business Overview

11.31.5 Life-Beauty Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Cosmetics OEM and ODM Market Size CAGR by Region (2020 VS 2024 VS 2031) & (\$ millions)

Table 2. Cosmetics OEM and ODM Annual Sales CAGR by Country/Region (2020, 2024 & 2031) & (\$ millions)

Table 3. Major Players of Cosmetics OEM

Table 4. Major Players of Cosmetics ODM

Table 5. Cosmetics OEM and ODM Market Size CAGR by Type (2020 VS 2024 VS 2031) & (\$ millions)

Table 6. Global Cosmetics OEM and ODM Market Size by Type (2020-2025) & (\$ millions)

Table 7. Global Cosmetics OEM and ODM Market Size Market Share by Type (2020-2025)

Table 8. Cosmetics OEM and ODM Market Size CAGR by Application (2020 VS 2024 VS 2031) & (\$ millions)

Table 9. Global Cosmetics OEM and ODM Market Size by Application (2020-2025) & (\$ millions)

Table 10. Global Cosmetics OEM and ODM Market Size Market Share by Application (2020-2025)

Table 11. Global Cosmetics OEM and ODM Revenue by Player (2020-2025) & (\$ millions)

Table 12. Global Cosmetics OEM and ODM Revenue Market Share by Player (2020-2025)

Table 13. Cosmetics OEM and ODM Key Players Head office and Products Offered

Table 14. Cosmetics OEM and ODM Concentration Ratio (CR3, CR5 and CR10) & (2023-2025)

Table 15. New Products and Potential Entrants

Table 16. Mergers & Acquisitions, Expansion

Table 17. Global Cosmetics OEM and ODM Market Size by Region (2020-2025) & (\$ millions)

Table 18. Global Cosmetics OEM and ODM Market Size Market Share by Region (2020-2025)

Table 19. Global Cosmetics OEM and ODM Revenue by Country/Region (2020-2025) & (\$ millions)

Table 20. Global Cosmetics OEM and ODM Revenue Market Share by Country/Region (2020-2025)

Table 21. Americas Cosmetics OEM and ODM Market Size by Country (2020-2025) & (\$ millions)

Table 22. Americas Cosmetics OEM and ODM Market Size Market Share by Country (2020-2025)

Table 23. Americas Cosmetics OEM and ODM Market Size by Type (2020-2025) & (\$ millions)

Table 24. Americas Cosmetics OEM and ODM Market Size Market Share by Type (2020-2025)

Table 25. Americas Cosmetics OEM and ODM Market Size by Application (2020-2025) & (\$ millions)

Table 26. Americas Cosmetics OEM and ODM Market Size Market Share by Application (2020-2025)

Table 27. APAC Cosmetics OEM and ODM Market Size by Region (2020-2025) & (\$ millions)

Table 28. APAC Cosmetics OEM and ODM Market Size Market Share by Region (2020-2025)

Table 29. APAC Cosmetics OEM and ODM Market Size by Type (2020-2025) & (\$ millions)

Table 30. APAC Cosmetics OEM and ODM Market Size by Application (2020-2025) & (\$ millions)

Table 31. Europe Cosmetics OEM and ODM Market Size by Country (2020-2025) & (\$ millions)

Table 32. Europe Cosmetics OEM and ODM Market Size Market Share by Country (2020-2025)

Table 33. Europe Cosmetics OEM and ODM Market Size by Type (2020-2025) & (\$ millions)

Table 34. Europe Cosmetics OEM and ODM Market Size by Application (2020-2025) & (\$ millions)

Table 35. Middle East & Africa Cosmetics OEM and ODM Market Size by Region (2020-2025) & (\$ millions)

Table 36. Middle East & Africa Cosmetics OEM and ODM Market Size by Type (2020-2025) & (\$ millions)

Table 37. Middle East & Africa Cosmetics OEM and ODM Market Size by Application (2020-2025) & (\$ millions)

Table 38. Key Market Drivers & Growth Opportunities of Cosmetics OEM and ODM

Table 39. Key Market Challenges & Risks of Cosmetics OEM and ODM

Table 40. Key Industry Trends of Cosmetics OEM and ODM

Table 41. Global Cosmetics OEM and ODM Market Size Forecast by Region (2026-2031) & (\$ millions)

Table 42. Global Cosmetics OEM and ODM Market Size Market Share Forecast by Region (2026-2031)

Table 43. Global Cosmetics OEM and ODM Market Size Forecast by Type (2026-2031) & (\$ millions)

Table 44. Global Cosmetics OEM and ODM Market Size Forecast by Application (2026-2031) & (\$ millions)

Table 45. KDC/One Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 46. KDC/One Cosmetics OEM and ODM Product Offered

Table 47. KDC/One Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 48. KDC/One Main Business

Table 49. KDC/One Latest Developments

Table 50. COSMAX Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 51. COSMAX Cosmetics OEM and ODM Product Offered

Table 52. COSMAX Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 53. COSMAX Main Business

Table 54. COSMAX Latest Developments

Table 55. Intercos Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 56. Intercos Cosmetics OEM and ODM Product Offered

Table 57. Intercos Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 58. Intercos Main Business

Table 59. Intercos Latest Developments

Table 60. Kolmar Korea Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 61. Kolmar Korea Cosmetics OEM and ODM Product Offered

Table 62. Kolmar Korea Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 63. Kolmar Korea Main Business

Table 64. Kolmar Korea Latest Developments

Table 65. TOA Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 66. TOA Cosmetics OEM and ODM Product Offered

Table 67. TOA Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 68. TOA Main Business

Table 69. TOA Latest Developments

Table 70. Cosmo Beauty Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 71. Cosmo Beauty Cosmetics OEM and ODM Product Offered

Table 72. Cosmo Beauty Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 73. Cosmo Beauty Main Business

Table 74. Cosmo Beauty Latest Developments

Table 75. Cosmecca Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 76. Cosmecca Cosmetics OEM and ODM Product Offered

Table 77. Cosmecca Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 78. Cosmecca Main Business

Table 79. Cosmecca Latest Developments

Table 80. Mana Products Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 81. Mana Products Cosmetics OEM and ODM Product Offered

Table 82. Mana Products Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 83. Mana Products Main Business

Table 84. Mana Products Latest Developments

Table 85. Nox Bellow Cosmetics Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 86. Nox Bellow Cosmetics Cosmetics OEM and ODM Product Offered

Table 87. Nox Bellow Cosmetics Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 88. Nox Bellow Cosmetics Main Business

Table 89. Nox Bellow Cosmetics Latest Developments

Table 90. PICASO Cosmetic Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 91. PICASO Cosmetic Cosmetics OEM and ODM Product Offered

Table 92. PICASO Cosmetic Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 93. PICASO Cosmetic Main Business

Table 94. PICASO Cosmetic Latest Developments

Table 95. Toyo Beauty Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 96. Toyo Beauty Cosmetics OEM and ODM Product Offered
Table 97. Toyo Beauty Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)
Table 98. Toyo Beauty Main Business
Table 99. Toyo Beauty Latest Developments
Table 100. Cohere Beauty Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors
Table 101. Cohere Beauty Cosmetics OEM and ODM Product Offered
Table 102. Cohere Beauty Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)
Table 103. Cohere Beauty Main Business
Table 104. Cohere Beauty Latest Developments
Table 105. S&J Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors
Table 106. S&J Cosmetics OEM and ODM Product Offered
Table 107. S&J Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)
Table 108. S&J Main Business
Table 109. S&J Latest Developments
Table 110. Ancorotti Cosmetics Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors
Table 111. Ancorotti Cosmetics Cosmetics OEM and ODM Product Offered
Table 112. Ancorotti Cosmetics Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)
Table 113. Ancorotti Cosmetics Main Business
Table 114. Ancorotti Cosmetics Latest Developments
Table 115. A&H International Cosmetics Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors
Table 116. A&H International Cosmetics Cosmetics OEM and ODM Product Offered
Table 117. A&H International Cosmetics Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)
Table 118. A&H International Cosmetics Main Business
Table 119. A&H International Cosmetics Latest Developments
Table 120. Chromavis Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors
Table 121. Chromavis Cosmetics OEM and ODM Product Offered
Table 122. Chromavis Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)
Table 123. Chromavis Main Business

Table 124. Chromavis Latest Developments

Table 125. Opal Cosmetics Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 126. Opal Cosmetics Cosmetics OEM and ODM Product Offered

Table 127. Opal Cosmetics Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 128. Opal Cosmetics Main Business

Table 129. Opal Cosmetics Latest Developments

Table 130. Milott Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 131. Milott Cosmetics OEM and ODM Product Offered

Table 132. Milott Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 133. Milott Main Business

Table 134. Milott Latest Developments

Table 135. B.Kolor Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 136. B.Kolor Cosmetics OEM and ODM Product Offered

Table 137. B.Kolor Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 138. B.Kolor Main Business

Table 139. B.Kolor Latest Developments

Table 140. BioTruly Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 141. BioTruly Cosmetics OEM and ODM Product Offered

Table 142. BioTruly Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 143. BioTruly Main Business

Table 144. BioTruly Latest Developments

Table 145. Cosway Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 146. Cosway Cosmetics OEM and ODM Product Offered

Table 147. Cosway Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 148. Cosway Main Business

Table 149. Cosway Latest Developments

Table 150. Bawei Biotechnology Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 151. Bawei Biotechnology Cosmetics OEM and ODM Product Offered

Table 152. Bawei Biotechnology Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 153. Bawei Biotechnology Main Business

Table 154. Bawei Biotechnology Latest Developments

Table 155. Ridgepole Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 156. Ridgepole Cosmetics OEM and ODM Product Offered

Table 157. Ridgepole Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 158. Ridgepole Main Business

Table 159. Ridgepole Latest Developments

Table 160. ANTE (Suzhou) Cosmetics Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 161. ANTE (Suzhou) Cosmetics Cosmetics OEM and ODM Product Offered

Table 162. ANTE (Suzhou) Cosmetics Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 163. ANTE (Suzhou) Cosmetics Main Business

Table 164. ANTE (Suzhou) Cosmetics Latest Developments

Table 165. ESTATE CHEMICAL Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 166. ESTATE CHEMICAL Cosmetics OEM and ODM Product Offered

Table 167. ESTATE CHEMICAL Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 168. ESTATE CHEMICAL Main Business

Table 169. ESTATE CHEMICAL Latest Developments

Table 170. Ya Pure Cosmetics Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 171. Ya Pure Cosmetics Cosmetics OEM and ODM Product Offered

Table 172. Ya Pure Cosmetics Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 173. Ya Pure Cosmetics Main Business

Table 174. Ya Pure Cosmetics Latest Developments

Table 175. Jiangsu Meiaisi Cosmetics Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 176. Jiangsu Meiaisi Cosmetics Cosmetics OEM and ODM Product Offered

Table 177. Jiangsu Meiaisi Cosmetics Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 178. Jiangsu Meiaisi Cosmetics Main Business

Table 179. Jiangsu Meiaisi Cosmetics Latest Developments

Table 180. Homar Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 181. Homar Cosmetics OEM and ODM Product Offered

Table 182. Homar Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 183. Homar Main Business

Table 184. Homar Latest Developments

Table 185. Foshan Wanying Cosmetics Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 186. Foshan Wanying Cosmetics Cosmetics OEM and ODM Product Offered

Table 187. Foshan Wanying Cosmetics Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 188. Foshan Wanying Cosmetics Main Business

Table 189. Foshan Wanying Cosmetics Latest Developments

Table 190. Easycare Group Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 191. Easycare Group Cosmetics OEM and ODM Product Offered

Table 192. Easycare Group Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 193. Easycare Group Main Business

Table 194. Easycare Group Latest Developments

Table 195. Life-Beauty Details, Company Type, Cosmetics OEM and ODM Area Served and Its Competitors

Table 196. Life-Beauty Cosmetics OEM and ODM Product Offered

Table 197. Life-Beauty Cosmetics OEM and ODM Revenue (\$ million), Gross Margin and Market Share (2020-2025)

Table 198. Life-Beauty Main Business

Table 199. Life-Beauty Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Cosmetics OEM and ODM Report Years Considered
- Figure 2. Research Objectives
- Figure 3. Research Methodology
- Figure 4. Research Process and Data Source
- Figure 5. Global Cosmetics OEM and ODM Market Size Growth Rate (2020-2031) (\$ millions)
- Figure 6. Cosmetics OEM and ODM Sales by Geographic Region (2020, 2024 & 2031) & (\$ millions)
- Figure 7. Cosmetics OEM and ODM Sales Market Share by Country/Region (2024)
- Figure 8. Cosmetics OEM and ODM Sales Market Share by Country/Region (2020, 2024 & 2031)
- Figure 9. Global Cosmetics OEM and ODM Market Size Market Share by Type in 2024
- Figure 10. Cosmetics OEM and ODM in Skincare
- Figure 11. Global Cosmetics OEM and ODM Market: Skincare (2020-2025) & (\$ millions)
- Figure 12. Cosmetics OEM and ODM in Haircare
- Figure 13. Global Cosmetics OEM and ODM Market: Haircare (2020-2025) & (\$ millions)
- Figure 14. Cosmetics OEM and ODM in Makeup
- Figure 15. Global Cosmetics OEM and ODM Market: Makeup (2020-2025) & (\$ millions)
- Figure 16. Cosmetics OEM and ODM in Others
- Figure 17. Global Cosmetics OEM and ODM Market: Others (2020-2025) & (\$ millions)
- Figure 18. Global Cosmetics OEM and ODM Market Size Market Share by Application in 2024
- Figure 19. Global Cosmetics OEM and ODM Revenue Market Share by Player in 2024
- Figure 20. Global Cosmetics OEM and ODM Market Size Market Share by Region (2020-2025)
- Figure 21. Americas Cosmetics OEM and ODM Market Size 2020-2025 (\$ millions)
- Figure 22. APAC Cosmetics OEM and ODM Market Size 2020-2025 (\$ millions)
- Figure 23. Europe Cosmetics OEM and ODM Market Size 2020-2025 (\$ millions)
- Figure 24. Middle East & Africa Cosmetics OEM and ODM Market Size 2020-2025 (\$ millions)
- Figure 25. Americas Cosmetics OEM and ODM Value Market Share by Country in 2024
- Figure 26. United States Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 27. Canada Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 28. Mexico Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 29. Brazil Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 30. APAC Cosmetics OEM and ODM Market Size Market Share by Region in 2024

Figure 31. APAC Cosmetics OEM and ODM Market Size Market Share by Type (2020-2025)

Figure 32. APAC Cosmetics OEM and ODM Market Size Market Share by Application (2020-2025)

Figure 33. China Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 34. Japan Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 35. South Korea Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 36. Southeast Asia Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 37. India Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 38. Australia Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 39. Europe Cosmetics OEM and ODM Market Size Market Share by Country in 2024

Figure 40. Europe Cosmetics OEM and ODM Market Size Market Share by Type (2020-2025)

Figure 41. Europe Cosmetics OEM and ODM Market Size Market Share by Application (2020-2025)

Figure 42. Germany Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 43. France Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 44. UK Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 45. Italy Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 46. Russia Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 47. Middle East & Africa Cosmetics OEM and ODM Market Size Market Share by Region (2020-2025)

Figure 48. Middle East & Africa Cosmetics OEM and ODM Market Size Market Share by Type (2020-2025)

Figure 49. Middle East & Africa Cosmetics OEM and ODM Market Size Market Share

by Application (2020-2025)

Figure 50. Egypt Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 51. South Africa Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 52. Israel Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 53. Turkey Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 54. GCC Countries Cosmetics OEM and ODM Market Size Growth 2020-2025 (\$ millions)

Figure 55. Americas Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 56. APAC Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 57. Europe Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 58. Middle East & Africa Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 59. United States Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 60. Canada Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 61. Mexico Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 62. Brazil Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 63. China Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 64. Japan Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 65. Korea Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 66. Southeast Asia Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 67. India Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 68. Australia Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 69. Germany Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 70. France Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 71. UK Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 72. Italy Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 73. Russia Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 74. Egypt Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 75. South Africa Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 76. Israel Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 77. Turkey Cosmetics OEM and ODM Market Size 2026-2031 (\$ millions)

Figure 78. Global Cosmetics OEM and ODM Market Size Market Share Forecast by Type (2026-2031)

Figure 79. Global Cosmetics OEM and ODM Market Size Market Share Forecast by Application (2026-2031)

Figure 80. GCC Countries Cosmetics OEM and ODM Market Size 2026-2031 (\$

millions)

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