

# Ethylhexyl Salicylate Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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## Abstracts

### Ethylhexyl Salicylate Market Summary

Ethylhexyl Salicylate, also known as 2-ethylhexyl salicylate or octyl salicylate, represents a specialized segment within the chemical UV filter industry, distinguished by its unique properties as a UVB absorber and its widespread application in beauty and personal care products. This colorless to light yellowish oily liquid functions as a chemical sunscreen agent that effectively absorbs ultraviolet radiation in the UVB spectrum (280-320 nm), with peak absorbance at 306 nm. While classified as a relatively weak UV filter compared to more potent alternatives, ethylhexyl salicylate offers significant advantages including superior safety profile, lower toxicity levels, and cost-effectiveness, making it one of the most commonly utilized UV absorbers in consumer sunscreen formulations. The compound's molecular structure enables effective UVB protection while maintaining excellent compatibility with various cosmetic formulations, including sunscreens, moisturizers, anti-aging products, and daily skincare items. Its relatively mild nature and established safety record have positioned ethylhexyl salicylate as a preferred choice for formulators seeking to balance protective efficacy with consumer safety considerations. The ingredient's versatility extends beyond pure sun protection applications, as it serves as a stabilizing agent in cosmetic formulations and contributes to the overall sensory experience of personal care products through its light texture and non-greasy application characteristics.

The global ethylhexyl salicylate market operates within the broader context of the beauty and personal care industry, which demonstrates robust growth dynamics driven by increasing consumer awareness of sun protection, aging prevention, and skincare health. The market is currently estimated to be valued between 45 to 85 million USD in

2025, with projections indicating growth to approximately 60 to 120 million USD by 2030. This expansion trajectory reflects a compound annual growth rate (CAGR) of 3.5% to 5.5%, representing steady but measured growth aligned with the mature nature of established UV filter technologies and the gradual evolution of consumer preferences toward more sophisticated sun protection solutions. The market's growth characteristics reflect several key factors including the expanding global awareness of UV radiation risks, increasing incorporation of sun protection factors in daily skincare routines, and the growing demand for multifunctional cosmetic products that combine protective and aesthetic benefits. The established regulatory approval status of ethylhexyl salicylate across major markets provides stability and predictability for manufacturers and formulators, while ongoing research into enhanced formulation techniques continues to expand its application potential across diverse product categories.

## **Regional Market Trends**

The ethylhexyl salicylate market demonstrates distinct regional growth patterns influenced by varying consumer behaviors, regulatory environments, climate conditions, and economic development levels across different geographic areas. Asia-Pacific region emerges as the most dynamic growth market, with projected CAGR of 4.5% to 7.0%, driven primarily by expanding middle-class populations, increasing disposable incomes, and growing awareness of skincare and sun protection benefits. China represents the largest regional market, benefiting from its massive consumer base, rapidly expanding beauty and personal care industry, and increasing urbanization rates that correlate with higher cosmetic product consumption. The region's tropical and subtropical climate conditions create consistent demand for sun protection products throughout the year, while rising consumer sophistication drives preference for products containing proven UV protection ingredients. Japan and South Korea contribute significantly to regional growth through their advanced beauty cultures, high per-capita spending on personal care products, and consumer preference for premium formulations incorporating effective sun protection technologies. The countries' leadership in cosmetic innovation and trend-setting influence extends throughout the Asia-Pacific region, supporting broader adoption of scientifically-backed UV protection ingredients.

Europe represents a mature but stable market with anticipated CAGR of 2.5% to 4.0%, characterized by well-established regulatory frameworks, high consumer awareness of sun protection importance, and sophisticated distribution channels serving diverse consumer segments. The region's stringent cosmetic regulations and consumer preference for proven, safe ingredients support steady demand for ethylhexyl salicylate

in both premium and mass-market formulations. Germany, France, and the United Kingdom lead regional consumption through their large cosmetic manufacturing sectors and high consumer spending on personal care products. Northern European countries demonstrate particularly strong demand during summer seasons, while Mediterranean markets maintain more consistent year-round consumption patterns due to extended sunny periods and outdoor lifestyle preferences. The region's focus on sustainable and environmentally responsible cosmetic ingredients aligns well with ethylhexyl salicylate's established safety profile and moderate environmental impact compared to more controversial UV filter alternatives.

North America is projected to achieve CAGR of 3.0% to 5.0%, representing steady growth driven by heightened skin cancer awareness, aging population demographics focused on prevention, and increasing incorporation of daily sun protection habits across diverse consumer segments. The United States dominates regional consumption through its large population, high disposable incomes, and well-developed beauty and personal care market infrastructure. The market benefits from strong dermatological community advocacy for daily sun protection use and increasing consumer education about UV radiation risks and prevention strategies. Canada contributes to regional growth through similar consumer awareness trends and climate conditions that necessitate seasonal sun protection product usage. The region's regulatory environment supports continued use of established UV filter ingredients while encouraging innovation in formulation techniques and product delivery systems that enhance consumer experience and compliance with sun protection recommendations.

## **Application Trends and Growth**

The beauty and personal care application segment represents the dominant and most dynamic area for ethylhexyl salicylate utilization, with projected growth rates of 3.5% to 5.5% CAGR reflecting the compound's integral role in modern cosmetic formulations. Within this broad category, dedicated sunscreen products constitute the largest application segment, benefiting from increasing consumer awareness of daily sun protection importance and the growing trend toward incorporating SPF protection into routine skincare regimens. The segment's growth trajectory reflects both increasing product usage frequency and expanding consumer base adopting regular sun protection practices.

The facial skincare segment demonstrates particularly strong growth potential, with CAGR projections of 4.0% to 6.5%, driven by consumer focus on facial protection and anti-aging prevention strategies. Ethylhexyl salicylate's mild

nature and excellent compatibility with other skincare actives make it ideally suited for daily-use facial moisturizers, serums, and multi-functional products that combine hydration, anti-aging, and protection benefits. The increasing popularity of Korean and Japanese skincare routines, which emphasize daily sun protection as fundamental skincare steps, supports continued growth in this application area.

Body care products represent another significant growth segment, with anticipated CAGR of 3.0% to 5.0%, reflecting increasing consumer attention to comprehensive body protection and the expansion of sun protection awareness beyond facial applications. The segment benefits from growing participation in outdoor activities, travel, and recreational sports that increase UV exposure risks and drive demand for effective body protection products.

The makeup and color cosmetics segment shows promising growth potential with CAGR of 4.5% to 7.0%, as consumers increasingly demand cosmetic products that provide both aesthetic enhancement and protective benefits. Ethylhexyl salicylate's compatibility with color cosmetic formulations enables its incorporation into foundations, BB creams, CC creams, and tinted moisturizers that offer built-in sun protection without compromising color performance or wear characteristics. This segment reflects the broader trend toward multifunctional cosmetic products that address multiple consumer needs within single applications.

Pediatric and family-oriented products represent an emerging growth segment with strong potential, driven by increasing parental awareness of childhood UV protection importance and the compound's favorable safety profile for sensitive skin applications. The development of specialized formulations targeting children's unique skin needs and sensitivities creates additional market opportunities while addressing growing parental concerns about long-term skin health and sun damage prevention.

## Key Market Players

The ethylhexyl salicylate market features a concentrated competitive landscape dominated by established multinational corporations with comprehensive expertise in specialty chemical manufacturing, cosmetic ingredient development, and global distribution capabilities across diverse market segments.

DSM-Firmenich emerges as a global leader following the strategic merger of DSM and Firmenich, creating a powerhouse in specialty ingredients with comprehensive capabilities spanning nutrition, health, and beauty sectors. The combined entity leverages extensive research and development capabilities, global manufacturing infrastructure, and established customer relationships across major cosmetic manufacturers worldwide. DSM-Firmenich's PARSOL EHS product line represents a premium offering within the ethylhexyl salicylate market, supported by comprehensive technical support, application development expertise, and regulatory compliance assistance that enables cosmetic manufacturers to successfully incorporate the ingredient into diverse formulation types. The company's global presence and commitment to sustainable ingredient development align with increasing industry focus on environmentally responsible cosmetic formulations while maintaining product efficacy and safety standards. DSM-Firmenich's extensive market reach and technical capabilities position the company to serve both large multinational cosmetic manufacturers and smaller specialty brands seeking high-quality UV filter ingredients with comprehensive support services.

Symrise represents another major global player with significant expertise in cosmetic ingredients and fragrance technologies. The company's Neo Heliopan OS product demonstrates its commitment to developing advanced UV filter solutions that meet evolving consumer and regulatory requirements. Symrise's strong research and development capabilities, global manufacturing network, and established relationships with leading cosmetic brands provide competitive advantages in serving sophisticated application requirements and emerging market opportunities. The company's focus on innovation and sustainability aligns with industry trends toward more environmentally conscious ingredient selection while maintaining product performance standards that meet consumer expectations for effective sun protection.

Merck KGaA maintains a strong position in the UV filter market through its Eusolex OS product line, leveraging the company's extensive expertise in specialty chemicals and life sciences applications. The company's global reach and technical capabilities enable comprehensive customer support across diverse geographic markets and application segments, while its commitment to quality and regulatory compliance provides reliability for cosmetic manufacturers operating in highly regulated environments.

Ashland contributes to the competitive landscape through its Escalol 587 UV



filter offering, supported by the company's broader expertise in personal care ingredients and specialty chemicals. The company's focus on innovative formulation solutions and customer support capabilities enables cosmetic manufacturers to optimize product performance while addressing specific consumer needs and market requirements.

Clariant's Eclipsogen EHS product reflects the company's commitment to sustainable and high-performance cosmetic ingredients. The company's global manufacturing capabilities and technical support services provide comprehensive solutions for cosmetic manufacturers seeking reliable UV filter ingredients with consistent quality and performance characteristics.

Regional manufacturers including Nanjing Cosmos Chemical Co. Ltd. and Hubei Meifeng Chemical Co. Ltd. contribute to global supply capacity with combined production capabilities exceeding 2,600 tons annually. These companies provide competitive pricing alternatives while maintaining quality standards necessary for cosmetic applications, supporting market accessibility across price-sensitive segments and emerging markets. Galaxy Surfactants represents an important regional player with its GalSORB Octyl Salicylate product, leveraging expertise in surfactant technologies and personal care ingredients to serve diverse customer requirements across multiple market segments.

## Porter Five Forces Analysis

**Threat of New Entrants: Low to Moderate.** The ethylhexyl salicylate market presents moderate barriers to entry due to established regulatory requirements, technical expertise necessities, and significant capital investments required for cosmetic ingredient manufacturing. New entrants must navigate complex regulatory approval processes across multiple jurisdictions, develop comprehensive quality control systems meeting cosmetic industry standards, and establish customer relationships within the conservative cosmetic manufacturing sector that prioritizes proven ingredient suppliers with established track records. The specialized nature of UV filter chemistry requires substantial technical expertise and research capabilities to ensure product consistency, stability, and performance characteristics that meet stringent cosmetic formulation requirements. However, the market's steady growth prospects and reasonable profitability levels may attract new entrants with relevant chemical manufacturing experience and sufficient resources to overcome entry barriers,

particularly in emerging markets with developing regulatory frameworks.

**Bargaining Power of Suppliers: Moderate.** Raw material suppliers for ethylhexyl salicylate synthesis possess moderate negotiating power due to the specialized nature of chemical precursors and the limited number of qualified suppliers capable of providing high-purity materials meeting cosmetic grade specifications. The established chemical supply chain and presence of multiple raw material sources provide some balance in supplier relationships, though quality requirements and regulatory compliance necessities limit supplier substitution flexibility. Long-term supply agreements and strategic supplier relationships help mitigate supplier power while ensuring consistent material quality and availability necessary for cosmetic ingredient applications.

**Bargaining Power of Buyers: Moderate to High.** Large multinational cosmetic manufacturers possess significant negotiating power due to their substantial volume requirements, technical expertise in evaluating alternative UV filter options, and ability to influence market dynamics through product formulation decisions. These customers can leverage their purchasing volumes to negotiate favorable pricing and service terms while demanding comprehensive technical support and regulatory compliance assistance. However, ethylhexyl salicylate's established performance characteristics, regulatory approval status, and formulation compatibility provide some protection for suppliers, particularly those offering superior technical support, consistent quality, and comprehensive customer service capabilities that enable successful product development and market introduction.

**Threat of Substitutes: Moderate to High.** Alternative UV filter ingredients including newer chemical filters, mineral UV blockers, and emerging photostable compounds present ongoing substitution threats, particularly as regulatory environments evolve and consumer preferences shift toward different protection technologies. The availability of multiple UV filter options with varying performance characteristics creates competitive pressure while providing formulators with alternatives for achieving desired protection levels and sensory properties. However, ethylhexyl salicylate's established safety profile, cost-effectiveness, and proven performance in diverse formulations provide competitive advantages that limit substitution risks in many applications, particularly those prioritizing cost optimization and regulatory predictability over maximum protection efficacy.

**Industry Rivalry: Moderate.** Competition within the ethylhexyl salicylate market focuses primarily on product quality, technical support capabilities, regulatory compliance assistance, and customer service excellence rather than intense price competition alone. The specialized nature of applications and limited number of qualified suppliers reduce aggressive competitive pressures while maintaining healthy market dynamics that reward innovation and customer service excellence. The presence of established global players alongside regional manufacturers creates balanced competitive conditions that benefit customers through diverse sourcing options while maintaining profitable operating conditions for efficient suppliers with strong customer relationships and technical capabilities.

## **Opportunities and Challenges**

**Opportunities:** The ethylhexyl salicylate market benefits from several converging trends that create substantial growth opportunities across multiple dimensions. The increasing global awareness of skin cancer risks and UV radiation damage drives expanding demand for effective sun protection products, creating sustained market growth for proven UV filter ingredients with established safety profiles. Consumer education initiatives by dermatological organizations and health authorities support broader adoption of daily sun protection practices, expanding the market beyond traditional seasonal usage patterns toward year-round consumption habits.

The growing trend toward multifunctional cosmetic products that combine aesthetic enhancement with protective benefits creates significant opportunities for ethylhexyl salicylate incorporation into diverse product categories including makeup, skincare, and anti-aging formulations. The compound's excellent compatibility with other cosmetic ingredients enables innovative formulation approaches that address multiple consumer needs within single products, supporting premium pricing strategies and market differentiation opportunities.

Emerging markets present substantial growth potential as rising disposable incomes, increasing urbanization, and growing beauty consciousness drive cosmetic product adoption in regions with high UV exposure levels and limited historical sun protection awareness. The expansion of international cosmetic brands into developing markets creates distribution opportunities while local market development supports indigenous



product development and manufacturing capabilities.

The aging global population represents a significant opportunity as older consumers increasingly focus on skin health maintenance and damage prevention strategies. This demographic shift supports sustained demand for products containing proven protective ingredients while creating opportunities for specialized formulations addressing age-related skin concerns combined with ongoing protection needs.

Regulatory trends favoring established, well-studied UV filter ingredients over newer alternatives with limited safety data provide competitive advantages for ethylhexyl salicylate suppliers, particularly in markets with stringent cosmetic safety requirements and consumer preferences for proven technologies.

**Challenges:** Despite favorable market conditions and growth opportunities, the ethylhexyl salicylate market faces several significant challenges requiring strategic management and operational excellence. The relatively weak UV protection strength compared to newer, more potent UV filter alternatives creates competitive pressure in applications requiring maximum protection efficacy, potentially limiting market share growth in premium sun protection segments where consumers prioritize protection performance over cost considerations.

Raw material cost volatility and supply chain complexities may impact production costs and profit margins, requiring effective supplier relationship management and strategic sourcing approaches to maintain competitive pricing while ensuring consistent product quality and availability. The global nature of cosmetic ingredient supply chains creates exposure to geopolitical risks, trade policy changes, and logistical disruptions that can affect market dynamics and operational efficiency.

Regulatory evolution across different jurisdictions creates ongoing compliance challenges and costs, particularly as safety standards continue to evolve and consumer advocacy groups raise questions about various cosmetic ingredients. The need for continuous regulatory monitoring and compliance investment requires sustained resource allocation while creating uncertainty about future market access and usage restrictions.

Competition from newer UV filter technologies with enhanced performance characteristics challenges market position, requiring ongoing investment in application

development and customer education to maintain competitive relevance. The conservative nature of cosmetic formulation practices creates barriers to rapid market changes while providing stability for established ingredients with proven performance records.

Consumer trend evolution toward natural and organic cosmetic products may challenge synthetic UV filter acceptance, though ethylhexyl salicylate's established safety profile and moderate environmental impact provide advantages compared to more controversial alternatives. The need for continuous market education and technical support to maintain customer relationships requires sustained investment in sales and technical service capabilities while managing cost pressures in competitive market conditions.

## Contents

### **CHAPTER 1 EXECUTIVE SUMMARY**

### **CHAPTER 2 ABBREVIATION AND ACRONYMS**

### **CHAPTER 3 PREFACE**

- 3.1 Research Scope
- 3.2 Research Sources
  - 3.2.1 Data Sources
  - 3.2.2 Assumptions
- 3.3 Research Method

### **CHAPTER 4 MARKET LANDSCAPE**

- 4.1 Market Overview
- 4.2 Classification/Types
- 4.3 Application/End Users

### **CHAPTER 5 MARKET TREND ANALYSIS**

- 5.1 Introduction
- 5.2 Drivers
- 5.3 Restraints
- 5.4 Opportunities
- 5.5 Threats

### **CHAPTER 6 INDUSTRY CHAIN ANALYSIS**

- 6.1 Upstream/Suppliers Analysis
- 6.2 Ethylhexyl Salicylate Analysis
  - 6.2.1 Technology Analysis
  - 6.2.2 Cost Analysis
  - 6.2.3 Market Channel Analysis
- 6.3 Downstream Buyers/End Users

### **CHAPTER 7 LATEST MARKET DYNAMICS**

- 7.1 Latest News
- 7.2 Merger and Acquisition
- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

## **CHAPTER 8 TRADING ANALYSIS**

- 8.1 Export of Ethylhexyl Salicylate by Region
- 8.2 Import of Ethylhexyl Salicylate by Region
- 8.3 Balance of Trade

## **CHAPTER 9 HISTORICAL AND FORECAST ETHYLHEXYL SALICYLATE MARKET IN NORTH AMERICA (2020-2030)**

- 9.1 Ethylhexyl Salicylate Market Size
- 9.2 Ethylhexyl Salicylate Demand by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Type Segmentation and Price
- 9.5 Key Countries Analysis
  - 9.5.1 United States
  - 9.5.2 Canada
  - 9.5.3 Mexico

## **CHAPTER 10 HISTORICAL AND FORECAST ETHYLHEXYL SALICYLATE MARKET IN SOUTH AMERICA (2020-2030)**

- 10.1 Ethylhexyl Salicylate Market Size
- 10.2 Ethylhexyl Salicylate Demand by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Type Segmentation and Price
- 10.5 Key Countries Analysis
  - 10.5.1 Brazil
  - 10.5.2 Argentina
  - 10.5.3 Chile
  - 10.5.4 Peru

## **CHAPTER 11 HISTORICAL AND FORECAST ETHYLHEXYL SALICYLATE MARKET IN ASIA & PACIFIC (2020-2030)**

- 11.1 Ethylhexyl Salicylate Market Size
- 11.2 Ethylhexyl Salicylate Demand by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Type Segmentation and Price
- 11.5 Key Countries Analysis
  - 11.5.1 China
  - 11.5.2 India
  - 11.5.3 Japan
  - 11.5.4 South Korea
  - 11.5.5 Southeast Asia
  - 11.5.6 Australia

## **CHAPTER 12 HISTORICAL AND FORECAST ETHYLHEXYL SALICYLATE MARKET IN EUROPE (2020-2030)**

- 12.1 Ethylhexyl Salicylate Market Size
- 12.2 Ethylhexyl Salicylate Demand by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Type Segmentation and Price
- 12.5 Key Countries Analysis
  - 12.5.1 Germany
  - 12.5.2 France
  - 12.5.3 United Kingdom
  - 12.5.4 Italy
  - 12.5.5 Spain
  - 12.5.6 Belgium
  - 12.5.7 Netherlands
  - 12.5.8 Austria
  - 12.5.9 Poland
  - 12.5.10 Russia

## **CHAPTER 13 HISTORICAL AND FORECAST ETHYLHEXYL SALICYLATE MARKET IN MEA (2020-2030)**

- 13.1 Ethylhexyl Salicylate Market Size
- 13.2 Ethylhexyl Salicylate Demand by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Type Segmentation and Price
- 13.5 Key Countries Analysis



- 13.5.1 Egypt
- 13.5.2 Israel
- 13.5.3 South Africa
- 13.5.4 Gulf Cooperation Council Countries
- 13.5.5 Turkey

## **CHAPTER 14 SUMMARY FOR GLOBAL ETHYLHEXYL SALICYLATE MARKET (2020-2025)**

- 14.1 Ethylhexyl Salicylate Market Size
- 14.2 Ethylhexyl Salicylate Demand by End Use
- 14.3 Competition by Players/Suppliers
- 14.4 Type Segmentation and Price

## **CHAPTER 15 GLOBAL ETHYLHEXYL SALICYLATE MARKET FORECAST (2025-2030)**

- 15.1 Ethylhexyl Salicylate Market Size Forecast
- 15.2 Ethylhexyl Salicylate Demand Forecast
- 15.3 Competition by Players/Suppliers
- 15.4 Type Segmentation and Price Forecast

## **CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS**

- 16.1 DSM-Firmenich
  - 16.1.1 Company Profile
  - 16.1.2 Main Business and Ethylhexyl Salicylate Information
  - 16.1.3 SWOT Analysis of DSM-Firmenich
  - 16.1.4 DSM-Firmenich Ethylhexyl Salicylate Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.2 Symrise
  - 16.2.1 Company Profile
  - 16.2.2 Main Business and Ethylhexyl Salicylate Information
  - 16.2.3 SWOT Analysis of Symrise
  - 16.2.4 Symrise Ethylhexyl Salicylate Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.3 Merck KGaA
  - 16.3.1 Company Profile
  - 16.3.2 Main Business and Ethylhexyl Salicylate Information

- 16.3.3 SWOT Analysis of Merck KGaA
  - 16.3.4 Merck KGaA Ethylhexyl Salicylate Sales, Revenue, Price and Gross Margin (2020-2025)
  - 16.4 Ashland
    - 16.4.1 Company Profile
    - 16.4.2 Main Business and Ethylhexyl Salicylate Information
    - 16.4.3 SWOT Analysis of Ashland
    - 16.4.4 Ashland Ethylhexyl Salicylate Sales, Revenue, Price and Gross Margin (2020-2025)
  - 16.5 Clariant
    - 16.5.1 Company Profile
    - 16.5.2 Main Business and Ethylhexyl Salicylate Information
    - 16.5.3 SWOT Analysis of Clariant
    - 16.5.4 Clariant Ethylhexyl Salicylate Sales, Revenue, Price and Gross Margin (2020-2025)
  - 16.6 Chemspec Chemicals Pvt. Ltd.
    - 16.6.1 Company Profile
    - 16.6.2 Main Business and Ethylhexyl Salicylate Information
    - 16.6.3 SWOT Analysis of Chemspec Chemicals Pvt. Ltd.
    - 16.6.4 Chemspec Chemicals Pvt. Ltd. Ethylhexyl Salicylate Sales, Revenue, Price and Gross Margin (2020-2025)
  - 16.7 Galaxy Surfactants
    - 16.7.1 Company Profile
    - 16.7.2 Main Business and Ethylhexyl Salicylate Information
    - 16.7.3 SWOT Analysis of Galaxy Surfactants
    - 16.7.4 Galaxy Surfactants Ethylhexyl Salicylate Sales, Revenue, Price and Gross Margin (2020-2025)
  - 16.8 Nanjing Cosmos Chemical Co. Ltd.
    - 16.8.1 Company Profile
    - 16.8.2 Main Business and Ethylhexyl Salicylate Information
    - 16.8.3 SWOT Analysis of Nanjing Cosmos Chemical Co. Ltd.
    - 16.8.4 Nanjing Cosmos Chemical Co. Ltd. Ethylhexyl Salicylate Sales, Revenue, Price and Gross Margin (2020-2025)
- Please ask for sample pages for full companies list

## Tables & Figures

### TABLES AND FIGURES

Table Abbreviation and Acronyms List  
Table Research Scope of Ethylhexyl Salicylate Report  
Table Data Sources of Ethylhexyl Salicylate Report  
Table Major Assumptions of Ethylhexyl Salicylate Report  
Figure Market Size Estimated Method  
Figure Major Forecasting Factors  
Figure Ethylhexyl Salicylate Picture  
Table Ethylhexyl Salicylate Classification  
Table Ethylhexyl Salicylate Applications List  
Table Drivers of Ethylhexyl Salicylate Market  
Table Restraints of Ethylhexyl Salicylate Market  
Table Opportunities of Ethylhexyl Salicylate Market  
Table Threats of Ethylhexyl Salicylate Market  
Table Raw Materials Suppliers List  
Table Different Production Methods of Ethylhexyl Salicylate  
Table Cost Structure Analysis of Ethylhexyl Salicylate  
Table Key End Users List  
Table Latest News of Ethylhexyl Salicylate Market  
Table Merger and Acquisition List  
Table Planned/Future Project of Ethylhexyl Salicylate Market  
Table Policy of Ethylhexyl Salicylate Market  
Table 2020-2030 Regional Export of Ethylhexyl Salicylate  
Table 2020-2030 Regional Import of Ethylhexyl Salicylate  
Table 2020-2030 Regional Trade Balance  
Figure 2020-2030 Regional Trade Balance  
Table 2020-2030 North America Ethylhexyl Salicylate Market Size and Market Volume List  
Figure 2020-2030 North America Ethylhexyl Salicylate Market Size and CAGR  
Figure 2020-2030 North America Ethylhexyl Salicylate Market Volume and CAGR  
Table 2020-2030 North America Ethylhexyl Salicylate Demand List by Application  
Table 2020-2025 North America Ethylhexyl Salicylate Key Players Sales List  
Table 2020-2025 North America Ethylhexyl Salicylate Key Players Market Share List  
Table 2020-2030 North America Ethylhexyl Salicylate Demand List by Type  
Table 2020-2025 North America Ethylhexyl Salicylate Price List by Type  
Table 2020-2030 United States Ethylhexyl Salicylate Market Size and Market Volume

## List

Table 2020-2030 United States Ethylhexyl Salicylate Import & Export List

Table 2020-2030 Canada Ethylhexyl Salicylate Market Size and Market Volume List

Table 2020-2030 Canada Ethylhexyl Salicylate Import & Export List

Table 2020-2030 Mexico Ethylhexyl Salicylate Market Size and Market Volume List

Table 2020-2030 Mexico Ethylhexyl Salicylate Import & Export List

Table 2020-2030 South America Ethylhexyl Salicylate Market Size and Market Volume List

Figure 2020-2030 South America Ethylhexyl Salicylate Market Size and CAGR

Figure 2020-2030 South America Ethylhexyl Salicylate Market Volume and CAGR

Table 2020-2030 South America Ethylhexyl Salicylate Demand List by Application

Table 2020-2025 South America Ethylhexyl Salicylate Key Players Sales List

Table 2020-2025 South America Ethylhexyl Salicylate Key Players Market Share List

Table 2020-2030 South America Ethylhexyl Salicylate Demand List by Type

Table 2020-2025 South America Ethylhexyl Salicylate Price List by Type

Table 2020-2030 Brazil Ethylhexyl Salicylate Market Size and Market Volume List

Table 2020-2030 Brazil Ethylhexyl Salicylate Import & Export List

Table 2020-2030 Argentina Ethylhexyl Salicylate Market Size and Market Volume List

Table 2020-2030 Argentina Ethylhexyl Salicylate Import & Export List

Table 2020-2030 Chile Ethylhexyl Salicylate Market Size and Market Volume List

Table 2020-2030 Chile Ethylhexyl Salicylate Import & Export List

Table 2020-2030 Peru Ethylhexyl Salicylate Market Size and Market Volume List

Table 2020-2030 Peru Ethylhexyl Salicylate Import & Export List

Table 2020-2030 Asia & Pacific Ethylhexyl Salicylate Market Size and Market Volume List

Figure 2020-2030 Asia & Pacific Ethylhexyl Salicylate Market Size and CAGR

Figure 2020-2030 Asia & Pacific Ethylhexyl Salicylate Market Volume and CAGR

Table 2020-2030 Asia & Pacific Ethylhexyl Salicylate Demand List by Application

Table 2020-2025 Asia & Pacific Ethylhexyl Salicylate Key Players Sales List

Table 2020-2025 Asia & Pacific Ethylhexyl Salicylate Key Players Market Share List

Table 2020-2030 Asia & Pacific Ethylhexyl Salicylate Demand List by Type

Table 2020-2025 Asia & Pacific Ethylhexyl Salicylate Price List by Type

Table 2020-2030 China Ethylhexyl Salicylate Market Size and Market Volume List

Table 2020-2030 China Ethylhexyl Salicylate Import & Export List

Table 2020-2030 India Ethylhexyl Salicylate Market Size and Market Volume List

Table 2020-2030 India Ethylhexyl Salicylate Import & Export List

Table 2020-2030 Japan Ethylhexyl Salicylate Market Size and Market Volume List

Table 2020-2030 Japan Ethylhexyl Salicylate Import & Export List

Table 2020-2030 South Korea Ethylhexyl Salicylate Market Size and Market Volume

## List

Table 2020-2030 South Korea Ethylhexyl Salicylate Import & Export List  
Table 2020-2030 Southeast Asia Ethylhexyl Salicylate Market Size List  
Table 2020-2030 Southeast Asia Ethylhexyl Salicylate Market Volume List  
Table 2020-2030 Southeast Asia Ethylhexyl Salicylate Import List  
Table 2020-2030 Southeast Asia Ethylhexyl Salicylate Export List  
Table 2020-2030 Australia Ethylhexyl Salicylate Market Size and Market Volume List  
Table 2020-2030 Australia Ethylhexyl Salicylate Import & Export List  
Table 2020-2030 Europe Ethylhexyl Salicylate Market Size and Market Volume List  
Figure 2020-2030 Europe Ethylhexyl Salicylate Market Size and CAGR  
Figure 2020-2030 Europe Ethylhexyl Salicylate Market Volume and CAGR  
Table 2020-2030 Europe Ethylhexyl Salicylate Demand List by Application  
Table 2020-2025 Europe Ethylhexyl Salicylate Key Players Sales List  
Table 2020-2025 Europe Ethylhexyl Salicylate Key Players Market Share List  
Table 2020-2030 Europe Ethylhexyl Salicylate Demand List by Type  
Table 2020-2025 Europe Ethylhexyl Salicylate Price List by Type  
Table 2020-2030 Germany Ethylhexyl Salicylate Market Size and Market Volume List  
Table 2020-2030 Germany Ethylhexyl Salicylate Import & Export List  
Table 2020-2030 France Ethylhexyl Salicylate Market Size and Market Volume List  
Table 2020-2030 France Ethylhexyl Salicylate Import & Export List  
Table 2020-2030 United Kingdom Ethylhexyl Salicylate Market Size and Market Volume List  
Table 2020-2030 United Kingdom Ethylhexyl Salicylate Import & Export List  
Table 2020-2030 Italy Ethylhexyl Salicylate Market Size and Market Volume List  
Table 2020-2030 Italy Ethylhexyl Salicylate Import & Export List  
Table 2020-2030 Spain Ethylhexyl Salicylate Market Size and Market Volume List  
Table 2020-2030 Spain Ethylhexyl Salicylate Import & Export List  
Table 2020-2030 Belgium Ethylhexyl Salicylate Market Size and Market Volume List  
Table 2020-2030 Belgium Ethylhexyl Salicylate Import & Export List  
Table 2020-2030 Netherlands Ethylhexyl Salicylate Market Size and Market Volume List  
Table 2020-2030 Netherlands Ethylhexyl Salicylate Import & Export List  
Table 2020-2030 Austria Ethylhexyl Salicylate Market Size and Market Volume List  
Table 2020-2030 Austria Ethylhexyl Salicylate Import & Export List  
Table 2020-2030 Poland Ethylhexyl Salicylate Market Size and Market Volume List  
Table 2020-2030 Poland Ethylhexyl Salicylate Import & Export List  
Table 2020-2030 Russia Ethylhexyl Salicylate Market Size and Market Volume List  
Table 2020-2030 Russia Ethylhexyl Salicylate Import & Export List  
Table 2020-2030 MEA Ethylhexyl Salicylate Market Size and Market Volume List  
Figure 2020-2030 MEA Ethylhexyl Salicylate Market Size and CAGR



Figure 2020-2030 MEA Ethylhexyl Salicylate Market Volume and CAGR  
Table 2020-2030 MEA Ethylhexyl Salicylate Demand List by Application  
Table 2020-2025 MEA Ethylhexyl Salicylate Key Players Sales List  
Table 2020-2025 MEA Ethylhexyl Salicylate Key Players Market Share List  
Table 2020-2030 MEA Ethylhexyl Salicylate Demand List by Type  
Table 2020-2025 MEA Ethylhexyl Salicylate Price List by Type  
Table 2020-2030 Egypt Ethylhexyl Salicylate Market Size and Market Volume List  
Table 2020-2030 Egypt Ethylhexyl Salicylate Import & Export List  
Table 2020-2030 Israel Ethylhexyl Salicylate Market Size and Market Volume List  
Table 2020-2030 Israel Ethylhexyl Salicylate Import & Export List  
Table 2020-2030 South Africa Ethylhexyl Salicylate Market Size and Market Volume List  
Table 2020-2030 South Africa Ethylhexyl Salicylate Import & Export List  
Table 2020-2030 Gulf Cooperation Council Countries Ethylhexyl Salicylate Market Size and Market Volume List  
Table 2020-2030 Gulf Cooperation Council Countries Ethylhexyl Salicylate Import & Export List  
Table 2020-2030 Turkey Ethylhexyl Salicylate Market Size and Market Volume List  
Table 2020-2030 Turkey Ethylhexyl Salicylate Import & Export List  
Table 2020-2025 Global Ethylhexyl Salicylate Market Size List by Region  
Table 2020-2025 Global Ethylhexyl Salicylate Market Size Share List by Region  
Table 2020-2025 Global Ethylhexyl Salicylate Market Volume List by Region  
Table 2020-2025 Global Ethylhexyl Salicylate Market Volume Share List by Region  
Table 2020-2025 Global Ethylhexyl Salicylate Demand List by Application  
Table 2020-2025 Global Ethylhexyl Salicylate Demand Market Share List by Application  
Table 2020-2025 Global Ethylhexyl Salicylate Capacity List  
Table 2020-2025 Global Ethylhexyl Salicylate Key Vendors Capacity Share List  
Table 2020-2025 Global Ethylhexyl Salicylate Key Vendors Production List  
Table 2020-2025 Global Ethylhexyl Salicylate Key Vendors Production Share List  
Figure 2020-2025 Global Ethylhexyl Salicylate Capacity Production and Growth Rate  
Table 2020-2025 Global Ethylhexyl Salicylate Key Vendors Production Value List  
Figure 2020-2025 Global Ethylhexyl Salicylate Production Value and Growth Rate  
Table 2020-2025 Global Ethylhexyl Salicylate Key Vendors Production Value Share List  
Table 2020-2025 Global Ethylhexyl Salicylate Demand List by Type  
Table 2020-2025 Global Ethylhexyl Salicylate Demand Market Share List by Type  
Table 2020-2025 Regional Ethylhexyl Salicylate Price List  
Table 2025-2030 Global Ethylhexyl Salicylate Market Size List by Region  
Table 2025-2030 Global Ethylhexyl Salicylate Market Size Share List by Region  
Table 2025-2030 Global Ethylhexyl Salicylate Market Volume List by Region

Table 2025-2030 Global Ethylhexyl Salicylate Market Volume Share List by Region  
Table 2025-2030 Global Ethylhexyl Salicylate Demand List by Application  
Table 2025-2030 Global Ethylhexyl Salicylate Demand Market Share List by Application  
Table 2025-2030 Global Ethylhexyl Salicylate Capacity List  
Table 2025-2030 Global Ethylhexyl Salicylate Key Vendors Capacity Share List  
Table 2025-2030 Global Ethylhexyl Salicylate Key Vendors Production List  
Table 2025-2030 Global Ethylhexyl Salicylate Key Vendors Production Share List  
Figure 2025-2030 Global Ethylhexyl Salicylate Capacity Production and Growth Rate  
Table 2025-2030 Global Ethylhexyl Salicylate Key Vendors Production Value List  
Figure 2025-2030 Global Ethylhexyl Salicylate Production Value and Growth Rate  
Table 2025-2030 Global Ethylhexyl Salicylate Key Vendors Production Value Share List  
Table 2025-2030 Global Ethylhexyl Salicylate Demand List by Type  
Table 2025-2030 Global Ethylhexyl Salicylate Demand Market Share List by Type  
Table 2025-2030 Ethylhexyl Salicylate Regional Price List  
Table DSM-Firmenich Information  
Table SWOT Analysis of DSM-Firmenich  
Table 2020-2025 DSM-Firmenich Ethylhexyl Salicylate Product Capacity Production  
Price Cost Production Value  
Figure 2020-2025 DSM-Firmenich Ethylhexyl Salicylate Capacity Production and  
Growth Rate  
Figure 2020-2025 DSM-Firmenich Ethylhexyl Salicylate Market Share  
Table Symrise Information  
Table SWOT Analysis of Symrise  
Table 2020-2025 Symrise Ethylhexyl Salicylate Product Capacity Production Price Cost  
Production Value  
Figure 2020-2025 Symrise Ethylhexyl Salicylate Capacity Production and Growth Rate  
Figure 2020-2025 Symrise Ethylhexyl Salicylate Market Share  
Table Merck KGaA Information  
Table SWOT Analysis of Merck KGaA  
Table 2020-2025 Merck KGaA Ethylhexyl Salicylate Product Capacity Production Price  
Cost Production Value  
Figure 2020-2025 Merck KGaA Ethylhexyl Salicylate Capacity Production and Growth  
Rate  
Figure 2020-2025 Merck KGaA Ethylhexyl Salicylate Market Share  
Table Ashland Information  
Table SWOT Analysis of Ashland  
Table 2020-2025 Ashland Ethylhexyl Salicylate Product Capacity Production Price Cost  
Production Value  
Figure 2020-2025 Ashland Ethylhexyl Salicylate Capacity Production and Growth Rate

Figure 2020-2025 Ashland Ethylhexyl Salicylate Market Share

Table Clariant Information

Table SWOT Analysis of Clariant

Table 2020-2025 Clariant Ethylhexyl Salicylate Product Capacity Production Price Cost  
Production Value

Figure 2020-2025 Clariant Ethylhexyl Salicylate Capacity Production and Growth Rate

Figure 2020-2025 Clariant Ethylhexyl Salicylate Market Share

Table Chemspec Chemicals Pvt. Ltd. Information

Table SWOT Analysis of Chemspec Chemicals Pvt. Ltd.

Table 2020-2025 Chemspec Chemicals Pvt. Ltd. Ethylhexyl Salicylate Product Capacity  
Production Price Cost Production Value

Figure 2020-2025 Chemspec Chemicals Pvt. Ltd. Ethylhexyl Salicylate Capacity  
Production and Growth Rate

Figure 2020-2025 Chemspec Chemicals Pvt. Ltd. Ethylhexyl Salicylate Market Share

Table Galaxy Surfactants Information

Table SWOT Analysis of Galaxy Surfactants

Table 2020-2025 Galaxy Surfactants Ethylhexyl Salicylate Product Capacity Production  
Price Cost Production Value

Figure 2020-2025 Galaxy Surfactants Ethylhexyl Salicylate Capacity Production and  
Growth Rate

Figure 2020-2025 Galaxy Surfactants Ethylhexyl Salicylate Market Share

Table Nanjing Cosmos Chemical Co. Ltd. Information

Table SWOT Analysis of Nanjing Cosmos Chemical Co. Ltd.

Table 2020-2025 Nanjing Cosmos Chemical Co. Ltd. Ethylhexyl Salicylate Product  
Capacity Production Price Cost Production Value

Figure 2020-2025 Nanjing Cosmos Chemical Co. Ltd. Ethylhexyl Salicylate Capacity  
Production and Growth Rate

Figure 2020-2025 Nanjing Cosmos Chemical Co. Ltd. Ethylhexyl Salicylate Market  
Share

Table Hubei Meifeng Chemical Co. Ltd. Information

Table SWOT Analysis of Hubei Meifeng Chemical Co. Ltd.

Table 2020-2025 Hubei Meifeng Chemical Co. Ltd. Ethylhexyl Salicylate Product  
Capacity Production Price Cost Production Value

Figure 2020-2025 Hubei Meifeng Chemical Co. Ltd. Ethylhexyl Salicylate Capacity  
Production and Growth Rate

Figure 2020-2025 Hubei Meifeng Chemical Co. Ltd. Ethylhexyl Salicylate Market Share

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