

# **Upcycled Botanical Retinoids Market Forecasts to 2032 – Global Analysis By Retinoid Type (Retinol, Retinaldehyde, Retinoic Acid and Retinyl Esters), Source, Extraction Method, Distribution Channel, Application and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Upcycled Botanical Retinoids Market is accounted for \$38.4 million in 2025 and is expected to reach \$122.5 million by 2032 growing at a CAGR of 18% during the forecast period. Upcycled Botanical Retinoids are plant-derived alternatives to synthetic retinoids, created by repurposing botanical by-products into active cosmetic ingredients. Retinoids are known for their role in skin renewal, anti-aging, and acne treatments, but traditional forms often cause irritation. Upcycled botanical versions utilize phytoactive compounds sourced from agricultural or herbal waste streams, ensuring both efficacy and sustainability. These formulations retain the rejuvenating properties of retinoids while reducing environmental impact, positioning them as eco-conscious innovations in skincare and cosmetics.

According to Beauty Innovation Journal, leading skincare brands are adopting upcycled botanical retinoids, reflecting consumer demand for sustainable and eco-certified anti-aging solutions.

Market Dynamics:

Driver:

Growing interest in sustainable skincare

The growing consumer inclination toward sustainable skincare is a major driver of the

upcycled botanical retinoids market. Increasing awareness of clean-label formulations, eco-friendly sourcing, and reduced waste practices is spurring demand for plant-derived actives. Consumers, especially millennials and Gen Z, are prioritizing green beauty choices that combine efficacy with ethical sourcing. This shift is compelling cosmetic companies to adopt upcycled botanical retinoids as alternatives to synthetic counterparts, aligning product portfolios with sustainability goals and strengthening brand reputation in premium skincare markets.

#### Restraint:

##### High costs of extraction processes

High extraction costs remain a significant restraint in scaling the upcycled botanical retinoids market. Specialized technologies and advanced purification processes required for bioactive recovery from plant byproducts increase production expenses. Small-scale producers often face challenges with economic feasibility, limiting accessibility in cost-sensitive markets. Furthermore, premium-grade certification and compliance with international cosmetic standards add to operational costs. Consequently, despite strong demand for eco-conscious products, price barriers restrict widespread adoption, particularly among mass-market cosmetic brands operating on tighter margins and competitive pricing strategies.

#### Opportunity:

##### Expansion in premium cosmetic brands

Expansion into premium cosmetic brands represents a promising growth opportunity. Luxury skincare players are increasingly adopting natural, sustainable actives to differentiate in a competitive marketplace. Upcycled botanical retinoids align perfectly with this trend, offering both high efficacy in anti-aging formulations and strong sustainability narratives. This dual advantage attracts environmentally conscious consumers willing to pay premium prices. Propelled by rising disposable incomes and heightened demand for clean beauty innovations, the integration of botanical retinoids into luxury brands is expected to accelerate market expansion.

#### Threat:

##### Stringent cosmetic safety regulations globally

Stringent cosmetic safety regulations pose a critical threat to the upcycled botanical retinoids market. Different regions enforce varied compliance frameworks regarding ingredient testing, toxicology validation, and labeling standards. Delays in regulatory approvals or rejection of claims can hinder product launches, especially in highly regulated markets like the EU and North America. Non-compliance risks lead to reputational damage and financial losses for cosmetic manufacturers. Thus, while the demand for upcycled ingredients is strong, regulatory complexities remain a major barrier to seamless global commercialization.

#### Covid-19 Impact:

The COVID-19 pandemic influenced the upcycled botanical retinoids market with mixed outcomes. Initially, supply chain disruptions and reduced availability of plant-based raw materials hampered extraction processes. However, the crisis also accelerated the shift toward sustainable, health-conscious, and natural skincare formulations as consumers became more mindful of wellness. Online channels boosted demand for eco-friendly cosmetic innovations, propelling awareness of upcycled retinoids. The post-pandemic focus on resilience, ethical sourcing, and circular economy models further reinforced market growth opportunities for sustainable cosmetic ingredients.

The retinol segment is expected to be the largest during the forecast period

The retinol segment is expected to account for the largest market share during the forecast period, owing to its widespread application in anti-aging and skin rejuvenation formulations. Renowned for its proven efficacy in reducing wrinkles, improving skin texture, and boosting collagen synthesis, retinol remains a key ingredient in cosmetics and dermatological treatments. Furthermore, its compatibility with upcycled botanical sources strengthens its adoption across sustainable product lines. This enduring demand positions retinol as the dominant revenue contributor in the market.

The marine by-products segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the marine by-products segment is predicted to witness the highest growth rate, impelled by increasing innovations in extracting bioactive compounds from algae, fish waste, and sea plants. These marine-derived retinoids offer natural, sustainable, and nutrient-rich alternatives to synthetic counterparts, fueling demand in clean-label skincare. Additionally, rising awareness of circular economy practices enhances utilization of discarded marine biomass. With growing preference for

eco-friendly beauty formulations, marine by-products emerge as the fastest-growing source segment in this market.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, driven by strong consumer demand for natural and sustainable beauty products. Countries like China, Japan, and South Korea dominate skincare innovation, fostering adoption of botanical retinoids in cosmetics. Moreover, robust raw material availability from agricultural and marine by-products strengthens regional manufacturing capabilities. Government support for sustainable practices further accelerates growth.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR attributed to rising consumer awareness of upcycled ingredients and increasing investments in green cosmetic formulations. Growing emphasis on clean-label, cruelty-free, and eco-conscious products drives adoption of botanical retinoids across the U.S. and Canada. Furthermore, collaborations between biotech firms and cosmetic giants accelerate product innovation and commercialization. The region's advanced R&D infrastructure and strong sustainability-driven consumer base propel its role as the fastest-growing regional market.

Key players in the market

Some of the key players in Upcycled Botanical Retinoids Market include BASF SE, Croda International Plc, Ashland Inc., Evonik Industries AG, Symrise AG, Seppic (a company under Air Liquide), SLI Chemicals, Summit Cosmetics Europe, Wilmar International, Vitelle Labs (Canada), Essential Labs (USA), Naturo & Orgo, Mamas Medicinals, Pure Heart Essentials, Seaflora Skincare, and Drunk Elephant.

Key Developments:

In August 2025, BASF SE expanded its sustainable botanical retinoid portfolio with the launch of a plant-based alternative designed for premium anti-aging skincare applications.

In July 2025, Croda International Plc introduced a new eco-designed botanical retinoid active aimed at enhancing formulation stability and reducing environmental footprint in

cosmetics.

In June 2025, Ashland Inc. unveiled a bio-derived retinoid solution at In-Cosmetics Global, targeting natural personal care brands seeking high efficacy with cleaner labels.

In May 2025, Evonik Industries AG launched a new botanical retinoid complex under its Care Solutions portfolio, catering to dermo-cosmetic and cosmeceutical manufacturers worldwide.

#### Retinoid Types Covered:

Retinol

Retinaldehyde

Retinoic Acid

Retinyl Esters

#### Sources Covered:

Food & Agricultural By-Products

Industrial By-Products

Marine By-Products

Other Botanical Sources

#### Extraction Methods Covered:

Solvent Extraction

Enzymatic Extraction

Supercritical Fluid Extraction

## Other Extraction Methods

### Distribution Channels Covered:

Online Retail

Specialty Stores

Direct Sales

Other Distribution Channels

### Applications Covered:

Skincare Products

Haircare Products

Cosmetic Formulations

Pharmaceutical Applications

Other Applications

### Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

## Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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