

Cosmetic Chemicals Market-Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Emollients & Moisturizers, Surfactants, Specialty Additives, Others), By Application (Skin Care, Hair Care, Color Cosmetics, Toiletries, Oral Care, Others), By Region, Competition

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Abstracts

The global cosmetic chemicals market was valued at USD 19.2 billion in 2022 and is projected to experience robust growth in the forecast period, with a CAGR of 4.5% through 2028. The market has witnessed a remarkable transformation, driven by evolving consumer preferences, technological advancements, and an increasing focus on sustainability. Cosmetic chemicals, serving as the foundation of beauty products, have played a pivotal role in shaping the beauty industry and meeting the diverse needs of modern consumers. The market encompasses a wide range of chemicals, including moisturizers, cleansers, dyes, preservatives, and more, which are utilized in skincare, haircare, makeup, perfumes, and other beauty products. The cosmetic chemicals market is highly competitive, comprising major multinational companies, specialty chemical manufacturers, and innovative startups. The industry has observed a shift towards sustainable and natural ingredients, in response to consumer preferences for clean beauty products that are devoid of harmful chemicals.

Key Market Drivers:

Growing Demand for Personal Care Products

The global cosmetic chemicals industry has experienced unprecedented growth over the past decade. The desire to enhance appearance and well-being transcends

borders, with beauty products becoming an integral part of daily routines for consumers worldwide. A primary driver of the global cosmetic chemicals market is the increasing awareness and demand for personal care products. Modern consumers are becoming more conscious of their appearance and seek products that address specific concerns and deliver visible results. The quest for healthier and more radiant skin, lustrous hair, and expressive makeup looks has spurred the demand for an extensive range of personal care products. Social media platforms have emerged as influential spaces where beauty trends originate and thrive. Beauty influencers and celebrities showcase the latest personal care products, endorsing new looks and skincare routines to their followers. The aspirational content on these platforms stimulates consumer curiosity and drives them to experiment with new products, contributing to the surge in demand. Across Europe, the vast majority of the 500 million customers utilize beauty and personal care items daily to safeguard their well-being, enhance their state of mind, and boost their self-confidence. From deodorants, fragrances, cosmetics, and hair care products, to cleansers, sunscreens, and toothpastes, beauty products serve a crucial purpose throughout all stages of a person's life, offering significant practical and psychological benefits.

Advancements in Chemical Formulation

The global cosmetic chemicals market has undergone a significant transformation, with chemical formulation innovations leading the way. The relentless pursuit of safer, more effective, and sustainable beauty solutions has resulted in remarkable advancements in cosmetic chemistry. The beauty and personal care industry now utilizes emerging product categories, such as osmolytes, which are organic compounds regulating fluid balance. DuPont's GENENCARE OSMS line of products, sourced from natural ingredients, contains osmolytes like betaine and inositol, derived from genetically unmodified sugar beet. Extensive laboratory and clinical examinations have demonstrated the moisturizing and protective capabilities of osmolytes, effectively safeguarding skin cells from dehydration and damage. Chemical advancements have unlocked the potential for hybrid and multi-functional cosmetic formulations, addressing consumer demands for simplicity and convenience. For instance, cosmetic chemicals are now formulated to combine skincare and makeup properties, providing coverage while nourishing and protecting the skin. Ensuring consumer safety remains a top priority in the beauty industry, driving advancements in chemical formulation and stricter adherence to safety standards. Researchers continually study and test cosmetic chemicals to deliver desired benefits while minimizing the risk of adverse reactions. This better understanding of ingredient interactions has led to safer and more efficacious cosmetic products for the skin, hair, and nails.

Globalization and E-Commerce

Globalization has provided cosmetic companies with access to a diverse range of raw materials and ingredients from around the world. This access to a wide spectrum of cosmetic chemicals allows brands to create innovative formulations tailored to the unique needs and preferences of consumers in different markets. E-commerce has emerged as a powerful platform connecting consumers and brands globally. Online retailing breaks down barriers, enabling cosmetic companies to expand their reach beyond local markets. With e-commerce, brands can introduce their cosmetic products to international customers, offering a broader selection of beauty solutions formulated with innovative cosmetic chemicals. This increased market penetration stimulates demand for cosmetic chemicals, fostering a thriving global market.

Expansion of Aging Population

The growth of the aging population and their increasing reliance on cosmetic products for managing their skin and hair are expected to contribute significantly to the impressive growth of the Global Cosmetic Chemicals Market in the forecast period. According to the United Nations, the global population aged 60 and above is projected to nearly double by 2050. Cosmetic chemicals play a crucial role in addressing the specific concerns of the aging population, providing targeted solutions for mature skin, hair, and nails. Peptides, hyaluronic acid, and retinoids are among the forefront ingredients in anti-aging formulations, targeting common signs of aging such as fine lines, wrinkles, loss of elasticity, and uneven skin tone. These chemicals help individuals maintain a youthful and radiant appearance as they nourish and protect mature skin with nutrient-rich ingredients. Vitamins C and E, niacinamide, and coenzyme Q10 combat environmental damage and improve overall skin health. In haircare products, cosmetic chemicals containing keratin, peptides, and plant extracts strengthen and revitalize aging hair, promoting shine, volume, and manageability.

However, the Global Cosmetic Chemicals Market faces key challenges. Rising costs for research and development (R&D) pose a significant hurdle. Extensive studies, clinical trials, and safety assessments are conducted by scientists and researchers to ensure the efficacy and safety of new ingredients and formulations. The cost of these studies, along with acquiring advanced technology and hiring skilled researchers, contributes to the overall increase in R&D costs. Cosmetic manufacturers are exploring innovative delivery systems like nanoemulsions, liposomes, and other advanced technologies to enhance product effectiveness. However, implementing such sophisticated delivery

systems requires substantial R&D investment. Balancing the investment in R&D with maintaining profitability and competitive pricing becomes a delicate challenge.

Disruption in Supply Chain of Cosmetic Chemicals

The emergence of health crises, such as the COVID-19 pandemic, has had extensive repercussions on the supply chain of cosmetic chemicals. Measures like travel restrictions, lockdowns, and social distancing protocols have disrupted logistics and impeded the flow of goods and raw materials across borders. Geopolitical tensions and trade conflicts between nations have introduced additional uncertainties into the cosmetic chemicals supply chain. Tariffs and trade barriers have the potential to affect import and export volumes, resulting in price fluctuations and varying availability of cosmetic chemicals across different regions. The rising consumer demand for sustainable and eco-friendly products has compelled cosmetic manufacturers to seek ethically sourced and environmentally responsible cosmetic chemicals. However, establishing a sustainable supply chain poses challenges, as it necessitates adherence to stringent environmental and social responsibility standards throughout the production and distribution processes.

Key Market Trends

Increasing Demand for Natural and Sustainable Ingredients

Clean beauty, characterized by formulations that are free from harmful chemicals, has emerged as a prominent trend in the cosmetics market. Natural and sustainable cosmetic chemicals are devoid of parabens, sulfates, phthalates, and other potentially harmful substances. This trend reflects consumers' preference for products that are gentle on the skin and have minimal environmental impact. Plant-derived ingredients are gaining traction as consumers gravitate towards nature's offerings for their skincare and personal care requirements. Cosmetic chemicals derived from botanical sources, such as aloe vera, chamomile, and green tea, offer numerous benefits for various skin and hair concerns. Their gentle yet effective properties make them ideal for clean and sustainable beauty products. The trend towards natural and sustainable ingredients has spurred innovations in green chemistry. Scientists are exploring novel techniques to extract and produce cosmetic chemicals with reduced environmental impact. Green chemistry techniques are not only eco-friendly but also often result in ingredients with enhanced efficacy and stability.

Growing Emphasis on Male Grooming

With the continuously growing demand for male-specific personal care products, the global cosmetic chemicals market is undergoing a significant transformation. Traditionally, men's grooming products were limited to basic shaving creams and aftershaves. However, the trend has expanded to encompass specialized skincare products, anti-aging solutions, grooming kits, and hair styling products. This escalating demand for a comprehensive range of male grooming products necessitates innovative cosmetic chemicals tailored to meet the specific requirements of men. From lightweight and non-greasy moisturizers to beard oils and soothing aftershave balms, these formulations are meticulously designed to address the distinctive characteristics of male skin and hair.

Segmental Insights

Type Insights

In 2022, the Emollients & Moisturizers segment dominated the cosmetic chemical market and is projected to continue its expansion in the upcoming years. Moisturizers, such as polymer molecules, play a crucial role in softening the skin by minimizing water loss. These ingredients are commonly found in facial creams, body creams, lipsticks, and skin moisturizers. Notably, the moisturizer and emollient sector accounted for over 30% of revenue in 2021, establishing its dominance in the market. Both natural and synthetic forms of moisturizers are widely available, including popular options like olive oil, coconut oil, beeswax, lanolin, petroleum jelly, glycerin, mineral oil, zinc oxide, diglycol laurate, and butyl stearate.

Insights from the Application

The cosmetic chemicals market witnessed the skin care segment as the dominant player in 2022, with further growth anticipated in the near future. This is primarily driven by the increasing consumer demand for skincare products, reflecting a growing concern for maintaining and taking care of healthy skin. The market growth is expected to be fueled by the global demand for sunblock, facial creams, and body moisturizers. Key players in the cosmetic chemicals industry are prioritizing the development of innovative skincare solutions. Moreover, a shift in consumer preference towards natural and organic ingredients is projected to drive the expansion of the cosmetic chemicals market during the forecast period. According to a survey, hair care and skincare products accounted for over 30% of total sales in 2022.

Regional Insights

The North America region has established itself as the leader in the Global Cosmetic Chemicals Market. The demand for cosmetic chemicals is propelling in the region because of their use in creating natural personal care items. The primary reason behind the growth of the cosmetic chemicals market in the area is the rise in investments in research and development by manufacturers, along with associated advancements in ingredient processing and cost-efficient production of natural personal care products. This pattern is expected to persist in the foreseeable future. In North America, the cosmetic substances market is marked by the presence of various small and large-scale manufacturers and suppliers of ingredients.

Key Market Players

BASF SE

Akzo Nobel NV

Clariant International, Ltd.

Solvay SA

Dow Chemical Company

Evonik Industries AG

Procter & Gamble Company

Cargill, Inc.

Sederma SAS

FMC Corporation

Report Scope:

In this report, the Global Cosmetic Chemicals Market has been segmented into the following categories, in addition to the industry trends which have also been detailed

below:

Cosmetic Chemicals Market, By Type:

Emollients & Moisturizers

Surfactants

Specialty Additives

Others

Cosmetic Chemicals Market, By Application:

Skin Care

Hair Care

Color Cosmetics

Toiletries

Oral Care

Others

Cosmetic Chemicals Market, By Region:

North America

Asia Pacific

Europe

Middle East & Africa

South America

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Cosmetic Chemicals Market.

Available Customizations:

Global Cosmetic Chemicals Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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