

Humectants Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028

Segmented By Type (Sugar Alcohol, Alpha Hydroxy Acid & Polysaccharides, Glycols, and Others), By Source (Synthetic and Natural), By Application (Food & Beverages, Oral & Personal Care, Pharmaceuticals, Animal Feed and Others), By Region and Competition

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Abstracts

Global Humectants Market has valued at USD 26.54 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 5.82% through 2028. Humectants are hygroscopic organic compounds that form hydrogen bonds with water molecules. These moisture-attracting substances can be derived from natural sources, such as glycerin, honey, aloe vera gel, and lactic acid, or they can be synthetically produced. By absorbing moisture from the air and retaining it in the stratum corneum, the upper layer of the skin, humectants play a crucial role in maintaining skin hydration. Not only do they help make the skin appear soft, supple, and hydrated, but they also reduce flakiness, cracking, and chaffing. Due to these beneficial properties, humectants are extensively utilized in the manufacturing of beauty and personal care products, ensuring that your skin remains nourished and protected.

Key Market Drivers

Rising Demand for Skincare & Haircare Products

The global surge in demand for skincare and haircare products is expected to significantly propel the humectants market. Humectants, substances that retain moisture, are critical components in these products, enhancing their efficacy by

preventing the loss of moisture, thus ensuring skin and hair remain hydrated, supple, and healthy. As consumers become more knowledgeable and concerned about the health of their skin and hair, the demand for high-quality, moisture-retaining products rises. This growing interest is further ignited by increased cosmetic industry innovation and the emergence of personalized beauty products tailored to specific skin and hair types. Moreover, the rise in e-commerce and digital marketing has facilitated easier and wider access to these products, expanding their consumer base. Changes in lifestyle, increased disposable income, and climatic changes have also contributed to the surge in demand for effective skincare and haircare products. Consequently, the humectants market is projected to experience significant growth, driven by the escalating demand for these products globally. With continued innovation and market expansion, humectants' demand is unlikely to dwindle, underlining their crucial role in skincare and haircare products.

Expanding Application in The Food & Beverage Sector

Humectants, substances that attract and retain moisture, are experiencing unprecedented demand globally in the Food & Beverage sector. This is largely due to their unique hygroscopic properties, which not only maintain the freshness of food products but also enhance their texture and palatability. Humectants such as glycerol, sorbitol, and honey are being extensively used to prevent the drying out of food items, thereby prolonging their shelf life. These ingredients are particularly useful in baked goods, confectioneries, and ready-to-eat meals, where they help preserve moisture and softness over time.

Moreover, humectants play a crucial role in low-fat food products. They provide volume and a pleasing mouthfeel, compensating for the reduction in fat content. This aligns with the growing consumer preference for healthier, low-calorie options, thus driving the demand for humectants across the globe. Additionally, the use of humectants in beverages is on the rise, given their ability to enhance the drink's flavor and provide a refreshing aftertaste. In part, the growth can also be attributed to the surge in food innovations and the introduction of new products, where humectants are key components. The increase in their application not only results in improved product quality but also in cost savings for manufacturers due to reduced wastage. These factors combined are expected to continue fueling the expansion of humectants use in the Food & Beverage sector, leading to a sustained growth trajectory in the global market.

Increased Consumer Preference for Natural & Organic Products

A rising trend amongst consumers worldwide is the increasing preference for natural and organic products, a shift that is expected to drive the global demand for humectants significantly. Humectants, substances that help retain moisture, are extensively used in various industries, including cosmetics, food, and pharmaceuticals. Customers are developing a growing awareness of the ingredients used in products and are favoring those with natural and organic components, including humectants. This preference stems from the perceived health benefits, eco-friendliness, and higher quality associated with natural and organic products. As a result, manufacturers are compelled to accommodate these consumer preferences, leading to an increased usage of natural humectants over synthetic ones. Furthermore, the benefits of humectants, such as improving skin health by retaining moisture and enhancing the shelf-life of food products, are well recognized. These advantages, coupled with the consumer shift towards natural and organic products, indicate a promising surge in the global demand for humectants. This trend underlines the potential for growth in industries that manufacture and supply natural humectants, presenting opportunities for innovation and market expansion in a consumer-driven marketplace.

Growing Usage of Humectants in The Manufacture of Animal Feed

The global demand for humectants is anticipated to rise significantly, driven primarily by their increasing usage in the manufacture of animal feed. Humectants, substances that promote moisture retention, play a critical role in maintaining the freshness and nutritional value of animal feed. They prevent the feed from drying out, enhancing its palatability and ensuring animals receive the necessary nutrients for growth and health. As the global livestock industry continues to expand, the demand for high-quality animal feed is escalating. This, in turn, is pushing the need for humectants to ensure the optimal quality of the feed. Moreover, the burgeoning trend of organic livestock farming further necessitates the use of natural humectants, such as glycerol and propylene glycol, thus broadening the market scope. Additionally, advancements in animal nutrition science are leading to the development of more effective humectants. These factors collectively contribute to the projection of an upward trajectory in the global demand for humectants.

Key Market Challenges

Availability Of Less Expensive Synthetic Substitutes

The global humectants market is forecasted to face significant challenges due to the

increasing availability of less expensive synthetic substitutes. These substitutes, made from a range of chemical constituents, are becoming popular in various industries, including cosmetics, food and beverages, and pharmaceuticals, that are major consumers of humectants. These synthetics offer similar benefits in terms of moisture retention and shelf-life extension but at a drastically reduced cost. The cost-effectiveness of these alternatives is compelling for businesses looking to optimize production costs, especially in these economically uncertain times. Consequently, the demand for traditional humectants is expected to decrease as businesses switch to these cheaper alternatives. Furthermore, the flexible production methods and ease of customization make synthetic humectants an attractive option. However, the potential environmental and health-related implications of these synthetics could pose a challenge to their widespread adoption. Therefore, while the immediate impact of synthetic alternatives might lead to a decrease in demand for natural humectants, the long-term effects of these changes remain to be seen.

Strict Restrictions About the Usage of Humectants

The stringent regulations concerning the use of humectants are anticipated to negatively impact their global demand. Humectants, substances often used in food and cosmetic products to preserve moisture, have come under scrutiny due to potential health risks associated with their overuse. Regulatory bodies worldwide are imposing strict restrictions on their usage, resulting in a downturn in market trends. For instance, some humectants have been linked to health conditions such as dehydration and digestive issues, prompting health organizations to recommend limited use. Furthermore, consumers are becoming more aware of the potential risks, driving demand for products free from such additives. This growing trend of awareness and health-consciousness, combined with the strict regulations, are expected to curb the global demand for humectants. Manufacturers are now seeking alternatives with safer profiles to maintain consumer trust and regulatory compliance. While this shift poses a challenge for humectant producers, it opens a window of opportunity for the development of innovative, health-friendly alternatives.

Key Market Trends

Emergence of Bio-Based Humectants

The global demand for humectants is set to rise significantly due to the emergence of bio-based alternatives. As humectants play a critical role in various industries, including cosmetics, food, and pharmaceuticals by maintaining moisture levels, the shift towards

bio-based humectants offers a more sustainable alternative. These environmentally friendly versions are derived from natural resources such as plants and biodegradable materials. The growing consumer preference for green products and stringent environmental regulations are driving this change. Additionally, bio-based humectants often provide better skin compatibility and natural moisturizing benefits in cosmetic applications, making them more appealing to an informed consumer base. They also have potential health benefits in food and pharmaceutical applications. Thus, with their environmental, health, and efficiency advantages, bio-based humectants are poised to significantly increase global humectant demand. However, the challenge lies in the high production costs and limited availability of raw materials. Still, with ongoing research and advances in bio-technology, these challenges are expected to be mitigated, paving the way for a surge in demand.

Increased Usage in Pharmaceutical Industry

The global demand for humectants is predicted to rise significantly, primarily driven by their increased usage in the pharmaceutical industry. Humectants, substances that promote moisture retention, play a critical role in the manufacturing of medications. They ensure the stability and effectiveness of drugs by preventing them from drying out, thereby extending their shelf-life. As the pharmaceutical industry expands in response to growing global health demands - a trend accelerated by the ongoing COVID-19 pandemic - the demand for humectants is expected to surge concurrently. Furthermore, humectants' essential role in liquid medications, creams, and gel-based pharmaceuticals underlines their importance in the creation of modern medications. Additionally, the push for innovation in drug formulation and delivery methods presents new opportunities for the application of humectants. The pharmaceutical sector's reliance on these substances illustrates a clear correlation between the industry's growth and the increased global demand for humectants. This upward trajectory is likely to continue as long as the pharmaceutical industry continues to expand and evolve.

Segmental Insights

Source Insights

Based on the Source, the natural humectants segment dominated the global humectants market in 2022. Glycerine, honey, and aloe vera are examples of natural humectants obtained from environmentally friendly sources that promote human health. The increasing popularity of natural and organic products in the food and cosmetics sectors is driving the demand for natural humectants. Glycerine is commonly used as a

natural sweetener and humectant in baked goods, confections, and beverages, ensuring their moisture retention. The market for natural humectants is expanding due to the rising demand for natural and organic cosmetics and personal care products.

During the forecast period, the synthetic humectants segment is expected to have the largest revenue CAGR. Synthetic humectants such as propylene glycol, butylene glycol, and Sorbitol are widely used in the cosmetics and pharmaceutical sectors due to their superior moisture retention properties and extended shelf life. Synthetic humectants are also in high demand due to their cost-effectiveness and ease of manufacturing. For instance, propylene glycol is a common synthetic humectant found in various cosmetics and personal care products, including moisturizers, shampoos, and conditioners. Additionally, it is utilized as a humectant and solvent in oral and topical pharmaceutical treatments.

Application Insights

Based on the Application, the food and beverage category continue to dominate the global humectants market in 2022. With a focus on preserving moisture content, enhancing texture, and extending shelf life, humectants play a vital role in the food industry. For example, glycerine is commonly used as a humectant in beverages, confections, and baked goods, while sorbitol finds its application in candies, ice cream, and chewing gum. As the demand for processed and packaged food products rises, the market for humectants in the food and beverage segment is expected to grow exponentially.

In addition to the food industry, humectants also find significant use in the personal care and cosmetics industry. They are employed in skincare and haircare products to improve moisture retention and prevent dryness. Glycerine, for instance, is frequently utilized in creams, lotions, and moisturizers, while butylene and propylene glycol are commonly employed as humectants in shampoos and conditioners for hair. As the cosmetics industry witnesses an increasing demand for anti-aging and moisturizing products, the personal care and cosmetics section of the humectants market is anticipated to experience substantial growth.

Regional Insights

Over the forecast period, the humectants market is expected to generate the highest revenue share from the Asia Pacific market. This growth is driven by the increasing need for humectants in the personal care and cosmetics sector, as well as the food and

beverage sector in the region. The expanding urbanization and population in countries like China and India have contributed to the growth of the humectants market in the region. Furthermore, the presence of large competitors in the area, offering a wide range of goods and services, has sparked innovation and competition, further fueling the expansion of the market.

In addition, the North American market is expected to experience a significant revenue compound annual growth rate (CAGR) during the projected period due to the rising demand for humectants in the personal care and cosmetics industries. This demand has been fueled by the increasing awareness of the benefits of natural and organic products. Moreover, the market has witnessed growth due to the presence of major competitors in the region, such as Ashland Global Holdings Inc. and DuPont de Nemours Inc., both offering a variety of high-quality humectants.

Key Market Players

Archer Daniel Midland Company

Ashland Global Holdings Inc.

BASF SE

Barentz BV

Brenntag AG

Cargill Incorporated

DuPont de Nemours, Inc.

Ingredion Incorporated

Roquette Freres

Dow Inc.

Report Scope:

In this report, the Global Humectants Market has been segmented into the following

categories, in addition to the industry trends which have also been detailed below:

Humectants Market, By Type:

Sugar Alcohol

Alpha Hydroxy Acid & Polysaccharides

Glycols

Others

Humectants Market, By Source:

Synthetic

Natural

Humectants Market, By Application:

Food & Beverages

Oral & Personal Care

Pharmaceuticals

Animal Feed

Others

Humectants Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

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

Available Customizations:

Global Humectants 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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