

Personal Care Ingredients Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Ingredient (Emollients, Emulsifiers, Surfactants, Rheology Modifiers, Active Ingredients, Others), By Application (Skin Care, Hair Care, Oral Care, Make-Up, Others), By Region and Competition

<https://marketpublishers.com/r/PE0B26245082EN.html>

Date: November 2023

Pages: 190

Price: US\$ 4,900.00 (Single User License)

ID: PE0B26245082EN

Abstracts

Global Personal Care Ingredients Market has valued at USD10.76 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 5.66% through 2028. These ingredients are commonly used in formulating a wide range of skincare, hair care, and cosmetics products. With their diverse properties, such as anti-aging, moisturizing, cleansing, complexion-enhancing, and pollution defense, they play a crucial role in enhancing the overall effectiveness of these products. Notably, there is a growing shift towards the use of natural and organic ingredients, gradually replacing synthetic constituents in personal hygiene products.

In response to the increasing demand for natural and sustainable alternatives, market players are actively developing products that harness the power of natural constituents. These products offer a multitude of benefits, including skin repair, cell damage prevention, enhanced skin immunity, hydration, and anti-aging effects. This trend is driven by evolving consumer lifestyles, a growing awareness of skincare, and a rising preference for natural ingredients in personal hygiene products.

Complex emulsions, known for their ability to provide sustained skin moisturization, protect sensitive biologicals, and offer prolonged release of aerosol fragrances, are extensively used in cosmetics and beauty products. As consumers increasingly

prioritize natural options, there is a rising demand for green, sustainable, and biodegradable emulsifiers in the market. Consequently, there has been a decline in the use of ethoxylated/propoxylated emulsifiers, while the demand for green-based non-ethoxylated emulsifiers, such as polyglyceryl esters and alkyl glucosides, is on the rise.

The COVID-19 pandemic has significantly impacted the personal care industry, with a steady market demand for hygiene-related constituents. These constituents are vital for the manufacturing of cleaning products, soaps, sanitizers, detergents, and other personal care items, as consumers have become increasingly aware of the importance of individual hygiene. However, the manufacturing processes have faced operational challenges, logistics delays, and trade restrictions, affecting the overall production of these essential products.

Key Market Drivers

Surge in Urbanization and Lifestyle Changes

Urbanization, characterized by the shift from rural living to city life, has a profound and far-reaching impact on consumer behavior. As people transition to urban areas, they are exposed to a myriad of changes that influence their preferences and choices, particularly in the realm of personal care products.

One of the key changes brought about by urbanization is the increased access to and demand for personal care products. In urban areas, individuals are often more exposed to pollutants, resulting in a heightened focus on skincare and haircare. The need to combat the negative effects of pollution and maintain a healthy appearance becomes a priority. Consequently, there is a surge in the demand for products that address these concerns, such as anti-pollution skincare and protective hair treatments.

Moreover, urban lifestyles often involve higher stress levels due to the fast-paced nature of city living. This increased stress leads to a greater demand for wellness and relaxation products, such as essential oils and bath salts. People seek solace in these soothing and rejuvenating products, which help them unwind and find moments of tranquility amidst the urban chaos.

These factors, arising from the urban environment and lifestyle, contribute significantly to the growing demand for personal care ingredients. Manufacturers and brands are continuously developing innovative solutions to cater to the needs and desires of urban consumers, investing heavily in research and development to create new, sustainable,

and high-performing ingredients.

Alongside urbanization, changes in lifestyle have also had a significant impact on the personal care ingredients market. With rising disposable incomes, consumers are now more willing to invest in high-quality, premium personal care products that offer superior efficacy and luxurious experiences. The desire for indulgence and self-care drives the demand for ingredients that provide exceptional performance and deliver visible results.

Furthermore, the health and wellness trends that have swept across the globe have influenced consumers to seek out natural and organic ingredients in their personal care products. The rise of the 'clean beauty' movement, driven by the desire for safe, non-toxic, and environmentally friendly products, has sparked a surge in demand for ingredients sourced from nature. Consumers are increasingly conscious of the ingredients they put on their skin and hair, embracing the power of nature to enhance their beauty routines.

In conclusion, the surge in urbanization and sweeping lifestyle changes are significant drivers of the global personal care ingredients market. As these trends continue to evolve and shape consumer preferences, the market is expected to witness further growth and innovation. Manufacturers, driven by the demand for effective and sustainable solutions, will continue to explore new frontiers in ingredient development, shaping the future of personal care products.

Rise in Disposable Income

Disposable income, which refers to the money households have available for spending and saving after deducting income taxes, plays a crucial role in shaping consumer behavior. As disposable income increases, consumer spending also tends to rise, especially on non-essential goods and services like personal care products.

In the context of developing countries, where economic growth has led to higher disposable incomes, there has been a noticeable shift in consumer spending patterns. Consumers are now more willing to allocate a larger portion of their budget towards high-quality, premium personal care products. This shift in consumer behavior has significantly impacted the demand for superior personal care ingredients.

The rise in disposable income has not only affected consumer behavior but also has significant implications for the global personal care ingredients market. As consumer spending on personal care products continues to increase, there is a direct correlation

with the heightened demand for personal care ingredients.

Furthermore, with the increase in disposable income, consumers are showing a growing preference for value-added products, leading to a surge in demand for natural, organic, and sustainable ingredients. This emerging trend has prompted manufacturers to focus on innovation and invest in research and development to meet evolving consumer preferences.

In conclusion, the rise in disposable income stands as a significant driver of the global personal care ingredients market. As consumers worldwide experience an increase in their spending power, the demand for high-quality, premium personal care products is expected to grow steadily. Consequently, this surge in demand further fuels the need for personal care ingredients, setting the stage for robust growth in the market. The interplay between disposable income, consumer behavior, and personal care ingredients creates a dynamic landscape that presents ample opportunities for market players to capitalize on.

Key Market Challenges

Volatility in Prices of Ingredient

The cost of raw materials used in personal care products can fluctuate significantly due to various factors such as changes in supply and demand, geopolitical events, natural disasters, and currency exchange rates. These price fluctuations can have a considerable impact on the cost of manufacturing personal care products, thereby affecting the profitability of companies operating in the personal care ingredients market.

For instance, the price of palm oil, a common ingredient in many personal care products, can vary greatly due to factors such as weather conditions affecting crop yield, changes in governmental policies, and shifts in global trade patterns. Similarly, petroleum-based ingredients like paraffin wax and mineral oil are subject to price volatility due to fluctuations in global oil prices.

The volatility in ingredient prices poses a significant challenge for the personal care ingredients market. It creates uncertainty and risk, making it difficult for companies to forecast costs and plan for the future. This unpredictability can lead to reduced profit margins, particularly for smaller companies that may not have the financial resilience to absorb these cost fluctuations.

In addition to the factors mentioned above, other factors can also contribute to price fluctuations in personal care ingredients. For example, changes in regulations and standards related to ingredient sourcing and sustainability can impact the availability and cost of certain raw materials. Consumer preferences and trends, such as the increasing demand for natural and organic ingredients, can also influence the pricing of personal care ingredients.

Furthermore, the global supply chain for personal care ingredients is complex, with raw materials sourced from different regions around the world. This introduces additional challenges in terms of logistics, transportation costs, and potential disruptions in the supply chain. All these factors contribute to the overall complexity and volatility of ingredient prices in the personal care industry.

In conclusion, the cost of raw materials used in personal care products is subject to significant fluctuations due to a wide range of factors. These fluctuations pose challenges for companies in the personal care ingredients market, making it crucial for them to closely monitor and manage the risks associated with ingredient price volatility. By doing so, companies can mitigate the impact on their profitability and ensure the long-term sustainability of their operations.

Key Market Trends

Growing Demand of Microbiome-Friendly Ingredients

The human microbiome, which refers to the trillions of microorganisms residing on and within our bodies, plays a vital role in maintaining our overall health and well-being. These microorganisms have been found to have a profound impact on various aspects of our physiology, including digestion, immunity, and even mental health.

In recent years, there has been a surge of interest in harnessing the power of the microbiome in the realm of personal care products. Scientists and researchers have recognized the potential of microbiome-friendly ingredients in promoting healthier skin and hair. These ingredients work by supporting and nourishing the natural microbial communities that exist on our skin and scalp.

Among the microbiome-friendly ingredients, prebiotics have gained significant attention. These substances act as a source of nutrition for the beneficial bacteria present on our skin and hair, helping them thrive and maintain a healthy balance. Additionally,

postbiotics, which are the beneficial by-products produced by these bacteria, have shown promising effects in enhancing the skin's barrier function and overall appearance.

The growing interest and demand for microbiome-friendly products have become a driving force in the personal care industry. Manufacturers are investing heavily in research and development to explore and produce novel microbiome-friendly ingredients that can cater to consumers' evolving needs. This wave of innovation has opened up new avenues for creating effective and sustainable personal care products that prioritize the health and balance of the skin and hair microbiome.

As consumers become more educated and aware of the crucial role of the microbiome in maintaining skin and hair health, the demand for microbiome-friendly ingredients is expected to continue its upward trajectory. This trend represents a significant shift in the global personal care ingredients market, reflecting the growing recognition of the microbiome's importance and its potential to revolutionize the way we approach personal care.

In conclusion, the rise of microbiome-friendly ingredients is not just a passing fad, but a transformative trend that is reshaping the personal care industry. With its focus on nurturing and maintaining a healthy microbial ecosystem, this trend is poised to have a lasting impact on the way we care for our skin and hair, ultimately leading to more effective and personalized beauty solutions.

Segmental Insights

Ingredient Insights

Based on the category of ingredient, the emollients segment emerged as the dominant player in the global market for Personal Care Ingredients in 2022. Emollients are widely used in various personal care products, including antiperspirants, deodorants, soaps, skin creams, face cleansers, and more. Their popularity stems from the soothing and smoothing properties they provide to the skin. Not only do emollients alleviate dryness and irritation, but they can also reduce scaling and itching, and help manage the overgrowth and shedding of skin cells associated with conditions like psoriasis. Moreover, these products have the ability to soften plaques and cracks, improve the skin's barrier function, ease inflammation, and act as a vehicle for active medical ingredients.

It is worth noting that emollients with a higher oil content also serve as occlusive agents. By forming a thin oily film on the skin, they create a barrier that seals in moisture. Emollients can be classified based on their oily or greasy nature, with each type offering a different level of occlusion. The more oil an emollient contains, the better it becomes at forming a protective layer on the skin, effectively trapping moisture.

Application Insights

The skin care segment is projected to experience rapid growth during the forecast period. Skin care is not just important for personal care, but it is also a crucial aspect of maintaining overall well-being. It encompasses a wide range of practices, from corrective measures to preventive routines, that contribute to the process of achieving flawless makeup. Having healthy and radiant skin has always been a timeless trend, and thanks to continuous innovations and advancements in the beauty industry, we can expect even more improved products with a focus on promoting skin health.

Skin care involves a holistic approach that not only addresses external factors but also takes into consideration internal factors such as nutrition and lifestyle choices. It encompasses practices that not only enhance the appearance of the skin but also protect its integrity and effectively treat various skin conditions. This comprehensive approach includes adopting a balanced diet, protecting the skin from excessive sun exposure, and using suitable emollients to nourish and moisturize the skin.

The global skin care products market is influenced by several factors that contribute to its growth and development. One significant factor is the changing lifestyle patterns in emerging countries, driven by rapid urbanization and an increase in disposable income. This shift in lifestyle has led to a rise in awareness about advanced skin care products and a growing demand for effective solutions. Furthermore, the beauty industry is constantly evolving, with continuous product innovations and the introduction of new ingredients to cater to the diverse needs of consumers. Investments in emerging countries have also played a crucial role in expanding the market reach and availability of skin care products.

However, it is important to note that the skin care industry also faces certain challenges. One such challenge is the limited shelf life of certain skin care products, which poses constraints on product availability and distribution. Additionally, the increasing awareness about skin sensitivity and the harmful effects of chemicals and synthetic ingredients has led to a demand for natural and organic alternatives. This growing consciousness among consumers has further fueled the market growth, as more

individuals seek safer and healthier options for their skin care routines.

In conclusion, skin care is a multifaceted discipline that encompasses various practices and considerations. With the constant evolution of the beauty industry and the increasing awareness about skin health, the market for skin care products is poised for further growth and development. By understanding the factors that drive this market, addressing its challenges, and prioritizing the needs of consumers, we can continue to witness advancements and improvements in the realm of skin care.

Regional Insights

Asia Pacific emerged as the dominant player in the Global Personal Care Ingredients Market in 2022, holding the largest market share in terms of value. The economy of APAC (Asia-Pacific) is primarily shaped by the economic dynamics of influential countries such as China and India. However, there is a noticeable shift in the current scenario due to the increasing foreign direct investment for the economic development of South East Asia. This change is particularly evident in the personal care sector, where countries in South East Asia are experiencing significant growth. This growth can be attributed to several factors, including the region's large prospective population, rising personal disposable income, and increasing internet penetration.

It is worth noting that the distribution of personal care products plays a crucial role in the success of companies operating in this sector. The distribution network directly impacts the demand and supply in the market, which, in turn, affects revenue. With the rising penetration of the internet and e-commerce worldwide, personal care product companies have expanded their reach. The advent of e-commerce has not only benefited companies by increasing their market reach but has also provided consumers with advantages such as competitive pricing and a wider range of options to choose from.

Overall, these developments highlight the evolving landscape of the APAC economy, with South East Asia emerging as a high-growth region in the personal care sector, fueled by factors such as population demographics, rising incomes, and increasing internet connectivity.

Key Market Players

ASHLAND GLOBAL HOLDINGS INC.

BASF SE

BERKSHIRE HATHAWAY INC.

CLARIANT AG

CRODA INTERNATIONAL PLC.

DOW INC.

Evonik Industries AG

J.M. HUBER CORPORATION

KCC CORPORATION

SOLVAY S.A.

Report Scope:

In this report, the Global Personal Care Ingredients Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Personal Care Ingredients Market, By Ingredient:

Emollients

Emulsifiers

Surfactants

Rheology Modifiers

Active Ingredients

Others

Personal Care Ingredients Market, By Application:

Skin Care

Hair Care

Oral Care

Make-Up

Others

Personal Care Ingredients 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 Personal Care Ingredients Market.

Available Customizations:

Global Personal Care Ingredients 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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