

United States Personal Care Ingredients Market By Type (Surfactants, Conditioning Polymers, Rheology Control Agents, Emollients, Emulsifiers, Others), By Application (Toiletries, Hair Care, Skin Care, Others), By Region, Competition, Forecast & Opportunities, 2019-2029F

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Abstracts

United States Personal Care Ingredients Market was valued at USD 1.18 Billion in 2023 and is anticipated to project steady growth to reach USD 1.52 Billion in 2029 with a CAGR of 4.35%. Personal care ingredients are the cornerstone of various personal care products, spanning shampoos, lotions, cosmetics, and toothpaste. Beyond mere formulation, these ingredients confer functional benefits like moisturizing, cleansing, anti-aging, and UV protection, among others. A notable trend in recent years is the shift towards organic and natural products, propelled by heightened consumer awareness of health and environmental impacts.

Consumers now actively seek products devoid of harsh chemicals and synthetic additives, spurring demand for natural and eco-friendly personal care ingredients. This surge has catalyzed research and development investments, fostering technological innovations and novel ingredient formulations.

The United States, boasting a robust consumer base and a thriving cosmetic and personal care sector, serves as a cornerstone for the global personal care ingredients market. It hosts several leading manufacturers, propelling demand for top-tier ingredients. Regulatory frameworks, especially those by the US Food and Drug Administration (FDA), wield substantial influence. Compliance with FDA standards mandates the use of approved, safe ingredients, further propelling the demand for

reliable and high-quality personal care ingredients.

The personal care ingredients market exhibits continual growth, shaped by evolving consumer preferences. Manufacturers are perpetually innovating to enhance product performance and cater to changing consumer needs and desires. This dynamic landscape, bolstered by technological advancements, underscores the industry's commitment to meeting evolving demands while ensuring safety and efficacy.

Innovations in personal care ingredient formulations are pivotal in meeting the diverse needs of consumers. Ingredients with multifunctional properties, such as natural botanical extracts and bioactive compounds, are gaining traction. These ingredients not only offer therapeutic benefits but also align with the growing preference for clean, sustainable products. Advancements in ingredient delivery systems, encapsulation technologies, and bio-based materials are revolutionizing the personal care industry. These innovations enhance ingredient stability, efficacy, and bioavailability, ensuring optimal performance in end products.

Collaborations between ingredient suppliers, manufacturers, and research institutions drive innovation and product development. Partnerships facilitate knowledge exchange, fostering the creation of cutting-edge formulations tailored to address specific consumer demands. The United States plays a pivotal role in steering the global personal care ingredients market, driven by consumer demand for natural, eco-friendly products. Continuous innovation and collaboration across the industry promise to meet evolving consumer preferences while ensuring product safety and efficacy in the dynamic landscape of personal care.

Key Market Drivers

Growing Demand for Personal Care Ingredients in Personal Care Industry

The United States Personal Care Ingredients Market is witnessing significant growth, fueled by the surging demand within the personal care industry. As consumers become increasingly educated and discerning about the products they use, the market for these ingredients is poised for robust expansion in the foreseeable future.

At the core of this growth is the escalating demand for high-quality personal care products. Consumers are no longer satisfied with basic functionality; they seek products offering additional benefits such as anti-aging properties or UV protection. This shift in consumer preferences is driving a surge in demand for sophisticated ingredients

capable of delivering these enhanced benefits. According to data from Statista, the United States is projected to generate USD 100.90 billion in revenue in the Beauty & Personal Care market in 2024. This growth is driven by a rising demand for clean and sustainable beauty products across the country.

Likewise, there is a notable trend towards natural and organic products among consumers. With a growing awareness of the potential adverse effects of harsh chemicals and synthetic additives, consumers are actively seeking out products formulated with natural and organic ingredients. This trend is spurring demand for natural and organic personal care ingredients, bolstering market growth.

Technological advancements within the personal care industry are also instrumental in driving market expansion. Innovations in ingredient formulation and manufacturing processes enable the development of more effective and efficient personal care products. These advancements appeal to consumers seeking cutting-edge solutions for their personal care needs, further stimulating market growth.

The accelerating focus on sustainability and environmental consciousness is shaping demand for personal care ingredients. Consumers are increasingly drawn to products that are eco-friendly and have minimal environmental impact. Consequently, there is a rising demand for ingredients derived from renewable sources and produced using sustainable practices.

The escalating demand for personal care ingredients within the personal care industry serves as a key driver of the United States Personal Care Ingredients Market. As consumer preferences evolve and the demand for high-quality, natural, and organic products continues to surge, the market is poised for substantial growth. The convergence of factors such as heightened consumer awareness, technological advancements, and sustainability initiatives will propel the market forward, opening up new opportunities for manufacturers and suppliers in the personal care ingredients industry.

Surge in Technological Advancements

In 2024, the U.S. Beauty Tech market is expected to generate revenue of USD 1.41 billion. This market includes a range of technological solutions designed to enhance the consumer experience with beauty and cosmetic products. The United States is at the forefront of Beauty Tech innovation, particularly with the development of advanced AI-powered skincare devices. Technological advancements have brought about a

paradigm shift in the personal care industry, ushering in a wave of innovation with the introduction of a diverse array of cutting-edge ingredients. These ingredients, meticulously crafted through advanced formulation and processing techniques, not only elevate the performance of personal care products but also cater to the evolving preferences of discerning consumers who prioritize sustainability.

A prominent trend within the industry is the surging demand for sustainable and traceable ingredients. Consumers are increasingly concerned about the environmental footprint of the products they use, driving the preference for personal care items that incorporate ethically sourced and environmentally friendly ingredients. This sustainability-driven shift has spurred manufacturers to invest heavily in research and development, resulting in the creation of novel ingredients that meet these stringent criteria.

Industry 4.0 is making a significant impact on the beauty industry, as technology experts and cosmetics brands come together to create Beauty Tech – an innovative landscape focused on enhancing customer service. Advancements in technologies such as artificial intelligence and machine learning (AI/ML), data analytics, cloud computing, augmented reality and virtual reality (AR/VR), and the Internet of Things (IoT) have been instrumental in the development of Beauty Tech. These products are designed to deliver highly immersive and realistic experiences for consumers.

Moreover, technology has fueled the demand for personalized personal care products, aligning with the increasing emphasis on individuality and tailored solutions. Consumers seek products that cater to their unique skin types, concerns, and preferences, driving the need for customizable formulations. This trend has propelled ingredient innovation to new heights, as companies endeavor to develop advanced ingredients that enable customization and personalization in personal care.

In response to this trend, companies are leveraging technology to develop innovative ingredients that offer customizable solutions for various skin types, concerns, and preferences. From personalized skincare regimens to tailored haircare formulations, technological advancements have enabled the creation of highly specialized ingredients that cater to individual needs.

Advancements in technology have facilitated the development of ingredients that address specific skincare concerns, such as acne, hyperpigmentation, or dryness. These ingredients are formulated with precision to deliver targeted benefits, ensuring optimal efficacy and consumer satisfaction. Technological advancements continue to

drive innovation in the personal care industry, leading to the development of advanced ingredients that cater to evolving consumer preferences. From sustainable and traceable ingredients to personalized formulations, technology plays a pivotal role in shaping the future of personal care products. As companies continue to harness the power of technology, the landscape of personal care ingredients will continue to evolve, offering consumers increasingly sophisticated and tailored solutions for their skincare and grooming needs.

Key Market Challenges

Supply Chain Disruptions and Price Volatility

The COVID-19 pandemic has unleashed profound disruptions across industries worldwide, and the personal care ingredients market is no exception. Supply chain disruptions have emerged as a significant challenge, stemming from global lockdowns and travel restrictions that have impeded the availability and transportation of critical raw materials. These disruptions have rippled through the industry, causing delays, interruptions, and increased lead times for ingredient manufacturers.

The market has been grappling with price volatility, driven by fluctuating costs of raw materials, energy, and transportation. The unpredictable nature of these cost dynamics has made it challenging for manufacturers to accurately forecast expenses and set prices. Consequently, market instability has been exacerbated, further complicating the operational landscape for industry players.

To navigate these challenges, companies in the personal care ingredients market are adopting strategies to enhance supply chain resilience and mitigate risks. This includes diversifying supplier networks to reduce dependency on single sources, strengthening relationships with key suppliers, and implementing robust contingency plans to address potential disruptions swiftly.

Likewise, technological advancements are playing a crucial role in mitigating supply chain challenges. The adoption of digital solutions such as supply chain management software, predictive analytics, and blockchain technology enables greater visibility and transparency across the supply chain, facilitating more informed decision-making and risk management.

Collaboration and partnerships within the industry can foster greater resilience and agility. By working together to share best practices, insights, and resources, companies

can enhance their collective ability to address supply chain disruptions and adapt to evolving market conditions.

Despite the challenges posed by the pandemic, the personal care ingredients market remains resilient, driven by ongoing consumer demand for high-quality and innovative products. By embracing technological innovations, fostering collaboration, and implementing robust supply chain strategies, industry players can navigate the current challenges and emerge stronger in the post-pandemic landscape.

Key Market Trends

Rising Demand for Anti-aging Solutions

The upsurge in consumer interest in personal care products is fundamentally driven by a heightened awareness of the importance of self-care. With increasing concerns about environmental pollution, stress, and unhealthy lifestyles, individuals are becoming more conscious of the impact of these factors on their overall health and the aging process. Consequently, consumers are actively seeking out products that offer more than just basic cleansing and moisturizing. They are looking for formulations that contain potent anti-aging properties to address visible signs of aging and promote a youthful appearance.

Tretinoin, a first-generation nonaromatic retinoid, is approved in the United States for use as an anti-aging treatment at a concentration of 0.05%. It has demonstrated efficacy in reducing signs of early skin aging caused by UV exposure, including wrinkles, loss of skin elasticity, and pigmentation. In response to this demand, manufacturers are focusing on innovating ingredient formulations to develop products that can deliver these anti-aging benefits more effectively. There is a growing preference for natural and organic ingredients as consumers seek safer and healthier alternatives to synthetic additives. These ingredients not only provide nourishment to the skin but also offer additional benefits such as antioxidant properties and skin rejuvenation.

However, it's not only about the ingredients themselves. The demand for anti-aging solutions is also driving advancements in product delivery systems. Manufacturers are investing heavily in research and development to create products that can effectively deliver anti-aging ingredients to the skin, ensuring maximum efficacy and optimal results. This includes exploring new technologies and techniques for better absorption and penetration into the skin layers.

By focusing on both ingredient innovation and delivery systems, the personal care industry is evolving to meet the growing demands of consumers seeking effective and comprehensive anti-aging solutions. The goal is to provide products that not only address immediate skincare needs but also contribute to long-term well-being and confidence.

Segmental Insights

Type Insights

Based on the category of type, the emollients segment has emerged as a fastest growing segment in the United States market for personal care ingredients, largely driven by their versatility and effectiveness in addressing various skin concerns. One significant factor fueling the demand for emollients is the widespread prevalence of skin diseases globally, such as acne and itching. These conditions affect a considerable portion of the population, prompting the use of emollients as a solution to manage symptoms. By providing essential moisture to the skin, emollients help alleviate dryness and irritation, offering relief and comfort to individuals dealing with these issues.

Also, emollients play a crucial role in the formulation of anti-aging creams and serums, contributing to the robust growth of this market segment. With consumers increasingly seeking effective anti-aging solutions, the demand for products containing emollients has surged. These ingredients aid in reducing the appearance of fine lines and wrinkles, while also improving overall skin texture. Their inclusion in anti-aging formulations is deemed essential, as they enhance the efficacy and performance of skincare products, delivering visible and long-lasting results to users. The emollients segment is poised for continued growth in the personal care ingredients market, driven by their multifaceted benefits and growing consumer demand for effective skincare solutions. As manufacturers continue to innovate and develop advanced formulations, emollients are expected to remain a cornerstone ingredient, catering to a wide range of skin concerns, and contributing to the development of high-performing personal care products..

Application Insights

Based on the application, the skin care segment is poised for rapid growth in the forecast period, driven by a shift in consumer preferences towards personalized and effective skincare regimens. As individuals become more aware of the importance of skin health, they are increasingly seeking products tailored to their specific needs and

concerns. This growing emphasis on skincare as part of overall wellness routines has spurred demand for high-quality skincare products and their ingredients.

The emergence of multifunctional skincare ingredients has significantly contributed to the dominance of skincare in the market. These innovative ingredients offer a diverse array of benefits, including moisturizing, anti-aging, and UV protection, all within a single product. Consumers are drawn to the convenience and efficiency of these multifunctional products, enabling them to address multiple skin concerns with minimal effort.

The convergence of personalized skincare routines and multifunctional ingredients has created a compelling synergy, further driving the success of skincare in the personal care industry. As consumers continue to prioritize skincare and seek out innovative solutions, the demand for effective and tailored skincare products is expected to fuel continued growth in this market segment.

Regional Insights

The Midwest has emerged as a dominant region in the United States Personal Care Ingredients Market in 2023, capturing the largest market share in terms of value. This supremacy can be attributed to several key factors, foremost among them being the region's robust industrial infrastructure. With a plethora of cutting-edge manufacturing facilities and renowned suppliers, the Mid-West stands at the forefront of ingredient production, offering a diverse range of high-quality personal care ingredients to meet consumer demands.

The Mid-West benefits from a conducive business environment that promotes innovation and growth within the industry. The region boasts a supportive regulatory framework, fostering an atmosphere conducive to innovation. Additionally, the Mid-West possesses a skilled workforce and excellent market access, making it an appealing destination for companies operating in the personal care ingredients sector.

A significant driver of the Mid-West's dominance is the substantial surge in consumer demand for personal care products across the region. This surge is fueled by a heightened awareness among consumers regarding the significance of personal care, coupled with an increase in disposable incomes. As consumers actively seek out premium personal care products, the demand for top-quality ingredients from the Mid-West continues to escalate steadily.

Key Market Players

BASF SE

Evonik Industries AG

Croda International Plc.

The Dow Chemical Company

Solvay SA

Report Scope:

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

United States Personal Care Ingredients Market, By Type:

Surfactants

Conditioning Polymers

Rheology Control Agents

Emollients

Emulsifiers

Others

United States Personal Care Ingredients Market, By Application:

Toiletries

Hair Care

Skin Care

Others

United States Personal Care Ingredients Market, By Region:

North-East

Mid-West

South

West

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United States Personal Care Ingredients Market.

Available Customizations:

United States Personal Care Ingredients Market report with the given market data, TechSci 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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