

Specialty Actives in Personal Care 2011: Multi-Regional Market Analysis and Opportunities

Published 2nd Quarter 2011

Base Year: 2010

Regional Coverage

United States

Europe

Functional activity has become a key marketing focus in skin care in recent years. This report program focuses on specialty actives, namely those used in cosmetic applications for anti-acne, anti-inflammatory, and other skin benefits.

Key questions addressed by this research include:

- What is the size of the specialty actives market by region, product category, and application?
- What are the growth prospects within each region and application for specialty actives?
- What regulations are affecting the market?
- What are comparative pricing differences for each product by region?
- Who are the leading suppliers?
 - What products do they offer?
 - What are their strengths and how do they position themselves?
 - What merger and acquisition activity has shaped the market?
- Which new products have entered the marketplace, and from whom have they taken market share?

Alongside our comprehensive market reports, data is also accessible via an interactive online database.

Specialty Actives in Personal Care 2011: Multi-Regional Market Analysis and Opportunities

Report Scope

Specialty Actives in Personal Care 2011: Multi-Regional Market Analysis and Opportunities provides a detailed independent appraisal of key regional markets including Europe and the United States, assessing current and forecast demand by major product and application, product trends and prices, distribution channels, supplier sales, and technical and market trends.

Specialty actives included within this program are grouped into the following categories:

- Botanical actives
- Biotechnology products
- Marine ingredients
- Proteins and peptides
- Enzymes and coenzymes

The following key functionality is explored by specialty active family:

- Anti-aging
- Anti-acne
- Anti-inflammatory
- Skin whitening/lightening
- Sun protection

The base year for this program is 2010 and includes forecasts to the year 2015.

Key Benefits

This research program provides marketing and product managers and directors within the personal care ingredients industry with understanding of the evolution of the market in each significant region, product group, and application. As a result, subscribers will be better positioned to exploit identified business opportunities at a day-to-day operational level and during the strategic planning process.

This program provides subscribers with:

- Identification of key growth by product and geography to enable development of targeted sales and marketing strategies to exploit high growth areas
- Highlights of new product developments which will influence growth in the market and also impact market share of existing products, thus allowing subscribers to develop the appropriate business strategy to follow growth or protect share
- An appraisal of market trends, supply and demand drivers enabling subscribers to position their products to maximize trends within the market
- Competitive intelligence for use in benchmarking and to enable subscribers to identify best practice in the industry
- Forecasting scenarios from which to base solid strategic business plans

The database program will feature the FutureView forecasting tool, which allows users to easily change variables to run various "what if" demand scenarios that will help shape business strategy development.

Report Contents

1. **INTRODUCTION**
2. **EXECUTIVE SUMMARY**
3. **MARKET INTRODUCTION AND OVERVIEW**
 - Introduction to specialty actives
 - Regulatory overview
 - Competitive landscape
4. **BOTANICAL ACTIVES**
5. **BIOTECHNOLOGY PRODUCTS**
6. **MARINE INGREDIENTS**
7. **PROTEINS AND PEPTIDES**
8. **ENZYME AND COENZYMES**

For each specialty active (Chapter 4-8), the following information will be provided:

- Market overview
- Pricing analysis
- Market sizing
- Competitive structure
- Market share analysis
- Key market drivers and constraints
- Market forecast and outlook

9. **FUNCTIONALITY ANALYSIS**

This chapter provides an overview of key functionality, for example, anti-aging, including the actives defined as "anti-aging" and potential for this market.

10. **SUPPLIER PROFILES**

Ten suppliers are profiled in each regional report.

DATABASE

The accompanying database provides quick access to the 2010 market data; with historic data for Europe and the United States from 2007. The interactive functions of the database allows users to customize views according to supplier, ingredient type, and application. Data includes:

- Consumption of specialty active by functionality and region
- Supplier sales by specialty active by region
- Average market pricing by region
- Forecast consumption of specialty active within a five-year timeframe

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Methodology

Kline is unmatched in our ability to gather hard-to-get market and competitive intelligence with a high degree of confidence. Kline's market analysis approach places the principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable.

During the course of field research, Kline's professional staff of industry experts conducted in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including leading manufacturers and marketers of personal care ingredients, leading end users and representatives from pertinent government agencies and trade associations.

This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities. Primary research comprises 95% of the overall research methodology for this report.

In addition, this analysis is supplemented by secondary research drawn from the review of suppliers' product literature and price lists; a search of recent trade and technical literature; Internet sources; and analysis of statistical data from government, industry, and trade associations and agencies.

Kline Credentials

Kline is a worldwide consulting and research firm dedicated to providing the kind of insight and knowledge that helps companies find a clear path to success. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for over 50 years.

Kline's research and consulting services extend across the entire chemicals industry value chain. Our solutions have helped clients develop better ways to create and profit from new business opportunities, respond to competitive and economic threats, improve productivity, achieve sustainable growth, and optimize performance. Kline provides clients with facts, forecasts, and recommendations based solidly on the realities of the market.

Our market research reports and services are designed to provide subscribers with a deeper understanding of their markets, an outlook for their business, and accurate information about their competitors. Our clients tell us they often use Kline's market research to validate their own internal analysis, and many clients rely on Kline reports as their most critical source of information.

For more information about this study or Kline's other services, e-mail us at sales@klinegroup.com, visit our website at www.KlineGroup.com, or contact us at any of our regional offices listed below.

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Recently published or in-progress research for the Personal Care/Chemicals industry includes:

- Global Personal Care Ingredients
- Specialty Actives and Active Delivery Systems for Personal Care
- Specialty Raw Materials for Cosmetics and Toiletries
- Opportunities in Specialty Actives and Active Delivery Systems for Cosmetics and Toiletries: U.S. and Western Europe
- Competitive Intelligence in Specialty Actives and Active Delivery Systems for Cosmetics and Toiletries: U.S. and Western Europe
- Professional Skin Care Market: U.S., Europe, and China