



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

Published April 2017

Base Year: 2016

Forecasts to 2021

Regional Coverage: Brazil ■ China ■ Europe ■ United States

Once restricted to only high-end products in developed markets, biofunctional active ingredients have become a key component of cosmetic formulation, following the quest for visible results from global consumers. Even though the market has grown significantly over the last decade, it is still a highly desirable segment for personal care ingredients suppliers as shown by the number of acquisitions in this field lately.

This Program Helps Subscribers Answer Key Questions Such as:

- What is the size of the specialty actives market by region, product category, and functionality?
- What are the growth prospects within each region and application for specialty actives?
- How are consumers' expectations answered by active ingredients suppliers?
- What regulations are affecting the market?
- What are comparative pricing differences for each product by region?
- Who are the leading suppliers?
- What merger and acquisition activity has shaped the market?
- Which new products have entered the marketplace, and from whom have they taken market share?



Report Contents

Introduction

Executive Summary

Market Introduction and Overview

- Introduction to specialty actives
- Regulatory overview
- Competitive landscape

Botanical Actives

Biotechnology Products

Marine Ingredients

Proteins and Peptides

Synthetic Active Ingredients

Enzyme and Coenzymes

For each specialty active, the following information is provided:

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

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.

Supplier Profiles

Ten suppliers are profiled in each regional report.

Database

The accompanying database provides quick access to the 2016 market data, with historic data for Europe and the United State, Brazil, and China (see Table 1). 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

Table 1: Regional Data

Region	Historical data	Base year	Forecast data
United States	2007, 2010, 2013	2016	2017-2021
Europe	2007, 2010, 2013	2016	2017-2021
China	2013	2016	2017-2021
Brazil	2013	2016	2017-2021



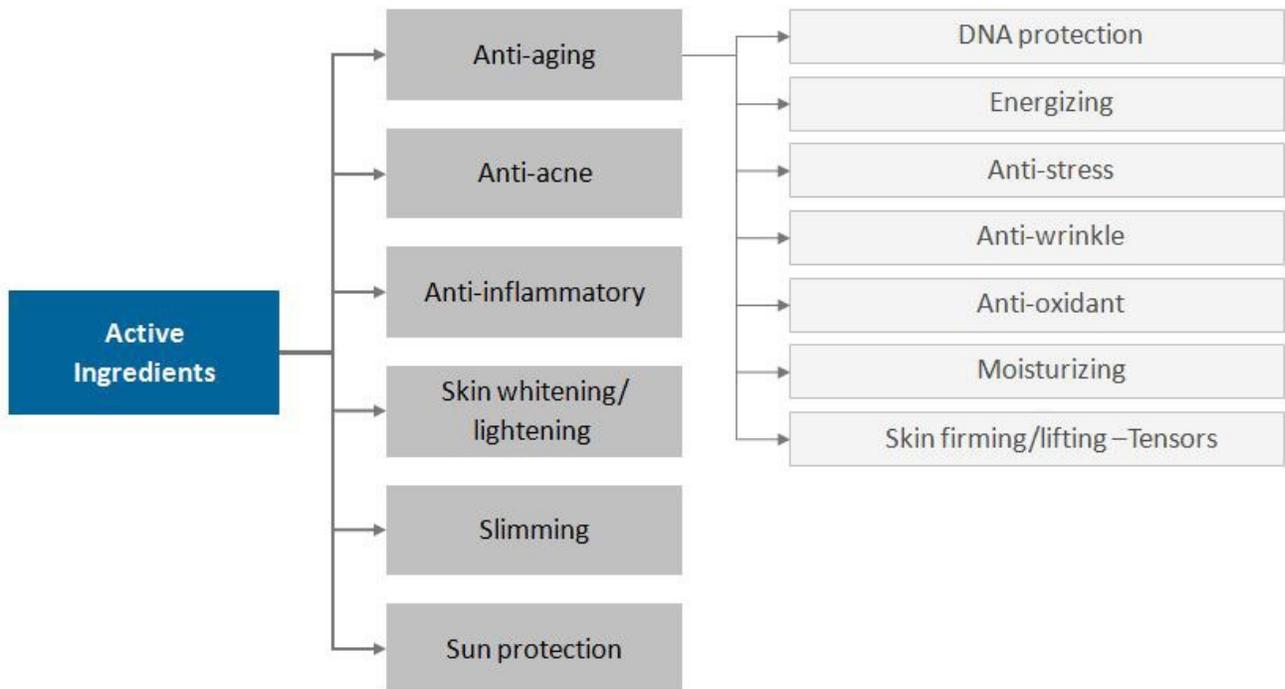
Scope

Specialty Actives in Personal Care: Multi-regional Market Analysis and Opportunities provides a detailed independent appraisal of the key regional markets, including Europe and the United States, but also the developing China and Brazil. The reports assess current and forecast demand by major product and functionality, 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
- Synthetic active ingredients

The following key functionality is explored by specialty active family (see Figure 1):

Figure 1: Functionality Segmentation





Key Benefits

This research program provides marketing and product managers and directors within the personal care ingredients industry with an 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



Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 50-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

Primary Research

We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Marketers/manufacturers
- Distributors
- Government agencies
- Retailers
- Suppliers
- Trade organizations

Secondary Research

We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/ industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

Comprehensive Market Intelligence

We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. 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.

A FULL SPECTRUM OF SERVICES



North America
+1-973-435-3407

Latin America
+55-11-3079-0792

Europe
+32-2-770-4740

China
+86-21-6012-6500

India
+91-124-4546-100

Japan
+81-3-3242-6277