



Specialty Actives in Personal Care: Global Market Analysis and Opportunities

To Be Published 4th Quarter 2019 and 1st Quarter 2020

Base Year: 2019

Forecasts to 2024

Regional Coverage: Brazil ■ China ■ Europe ■ Japan ■ South Korea ■ United States

Biofunctional active ingredients continue to be among the fastest-growing segments in the personal care industry and are therefore a very dynamic market. While Europe and the United States remain key markets, other geographies represent major potential growth areas, but each regional market has its own set of drivers and restraints. This study assesses the market for substantiated active ingredients used in personal care formulations.

This Program Helps Subscribers Answer Key Questions Such as:

- What is the size of the specialty actives market by region, category, and functionality?
- What are the growth prospects within each region and application for active ingredients?
- What are local consumers' expectations, and how are these expectations answered by active ingredients suppliers?
- How are regulations affecting innovation in different regions?
- What are comparative pricing differences for each active ingredient by region?
- Who are the leading and innovative suppliers?
- How has merger and acquisition activity shaped the market?
- What are the popular claims, and which claims are expected to be successful in the future?



Tentative 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.

Claim Analysis

While functionality (i.e. moisturizing, anti-oxidant, etc.) is an important product attribute, its claim (i.e. anti-pollution, blue light protection, etc.) is at least equally important as it is often going to be used in the finished product’s marketing message. This chapter provides an assessment of successful claims as well as an appraisal of claims expected to drive the market in the future.

Supplier Profiles

Ten suppliers are profiled in each regional report.

Database

The accompanying database provides quick access to the 2019 market data, with historic data for Europe and the United State, Brazil, and China (see Table 1). The interactive functions of the database allow users to customize views according to supplier, ingredient type, and application. Data includes:

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

* Subject to charter subscriber input

Table 1: Regional Data

Region	Historical data	Base year	Forecast data
United States	2007, 2010, 2013, 2016	2019	2020-2024
Europe	2007, 2010, 2013, 2016	2019	2020-2024
China	2013, 2016	2019	2020-2024
Brazil	2013, 2016	2019	2020-2024
Japan	-	2019	2020-2024
South Korea	-	2019	2020-2024

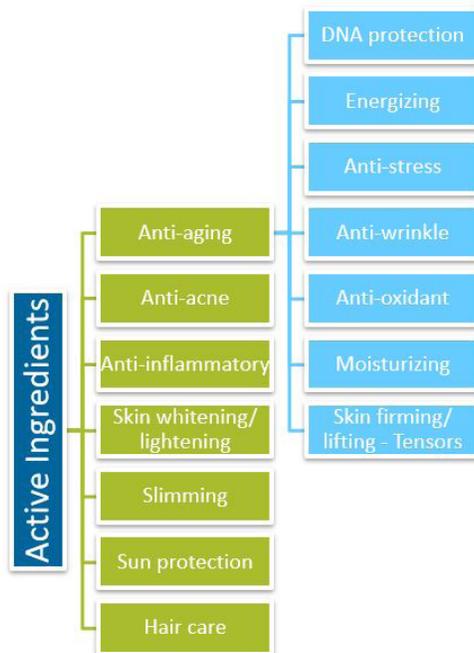
Scope

Specialty Actives in Personal Care: Global Market Analysis and Opportunities provides a detailed independent appraisal of the key regional markets, including Europe and the United States, the developing China and Brazil, and the trendsetting Japan and South Korea. The reports assess current and forecast demand by major ingredients and functionality, product trends and prices, distribution channels, supplier sales, and technical and market trends. Active ingredients included within this program are grouped into the following categories:

BOTANICALS 	<ul style="list-style-type: none"> • Substantiated botanical actives 	ENZYMES and COENZYMES 	<ul style="list-style-type: none"> • Coenzyme Q10 • Biotin • All other
BIOTECHNOLOGY 	<ul style="list-style-type: none"> • Hyaluronic acid and salts • Ceramides • Dihydroxy acetone • Steam cell extracts • Beta-1,3-glucans • Microalgae extracts • Phycopolysaccharides • Glucomannan • All other 	PROTEINS and PEPTIDES 	<ul style="list-style-type: none"> • Hydrolyzates • Amino acids • Quat proteins • Native proteins • Synthetic peptides • All other
MARINE INGREDIENTS 	<ul style="list-style-type: none"> • Substantiated algae extracts • Chitosan • All other, such as fish-based actives 	SYNTHETIC ACTIVES 	<ul style="list-style-type: none"> • Vitamin C (L-ascorbic acid) and derivatives • Vitamin B3 (Nicinamide) • All other, such as allantoin, salicylic acid, silanols, alpha hydroxy acids, etc.

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 within the personal care ingredients industry with an understanding of the evolution of the active ingredients 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 practices 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 60 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 60 years.

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