

Personal Care Ingredients Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 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, 2020-2030F

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Report description:

Market Overview

Global Personal Care Ingredients Market was valued at USD 11.83 Billion in 2024 and is expected to reach USD 16.22 Billion by 2030 with a CAGR of 5.47%. Ingredients used in skincare, hair care, and cosmetic products play a vital role in enhancing their performance by offering diverse benefits such as anti-aging, moisturizing, cleansing, complexion improvement, and protection against pollution. There is a notable industry-wide shift toward incorporating natural and organic ingredients, gradually replacing synthetic components in personal hygiene and cosmetic formulations. This trend is driven by increasing consumer demand for safer, eco-friendly, and sustainable products, reflecting evolving lifestyle preferences and greater awareness of skincare health. To meet this demand, manufacturers are focusing on developing products rich in natural constituents that deliver multiple benefits, including skin repair, prevention of cellular damage, enhanced skin immunity, hydration, and anti-aging effects. These natural formulations align with the growing consumer preference for clean-label, green beauty products.

Complex emulsions, widely utilized in cosmetic products, are prized for their ability to provide long-lasting skin moisturization, protect sensitive biological components, and facilitate controlled release of fragrances. As consumers prioritize sustainability, demand is rising for green, biodegradable emulsifiers, replacing traditional ethoxylated/propoxylated emulsifiers. Non-ethoxylated green emulsifiers such as polyglyceryl esters and alkyl glucosides are gaining traction, reflecting a broader move towards environmentally responsible ingredients.

The COVID-19 pandemic has notably influenced the personal care industry by accelerating demand for hygiene-related ingredients used in cleaning products, sanitizers, soaps, and detergents. Heightened consumer awareness around hygiene and sanitation has sustained strong market demand for these essential constituents. However, the industry has faced operational

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hurdles including production disruptions, logistics challenges, and trade restrictions, which have impacted manufacturing efficiency and supply chain stability.

Consumer preferences strongly favor "clean" products, with 68% of people seeking formulations described as such. Additionally, 59% of consumers are influenced by products labeled "natural and organic," highlighting the growing demand for safer and more sustainable personal care options. Supporting this trend, the global natural beauty and cosmetics market is projected to reach a value of USD 59 billion by 2031. These underscore the increasing importance of natural and clean ingredients in driving growth within the Global Personal Care Ingredients Market. The personal care and cosmetics sectors are experiencing a paradigm shift driven by sustainability, innovation, and heightened hygiene awareness. Manufacturers are responding by reformulating products with natural, eco-friendly ingredients while navigating operational challenges imposed by global disruptions. This dynamic environment continues to shape the future of the industry, emphasizing consumer health, environmental responsibility, and product efficacy.

Key Market Drivers

Surge in Urbanization and Lifestyle Changes

Urbanization, characterized by the migration from rural to urban areas, is a major catalyst reshaping consumer behavior, especially in the personal care industry. By 2050, urbanization is projected to reach 68% of the global population, meaning that two-thirds of the world's population will live in urban areas. This shift will add approximately 2.5 billion people to urban populations, with a significant portion of this growth occurring in Asia and Africa. Urban dwellers face increased exposure to pollution, which drives heightened demand for skincare and haircare products designed to combat environmental damage. Products that offer anti-pollution benefits and protective treatments have become essential, reflecting consumers' growing focus on maintaining healthy skin and hair in challenging urban environments. The fast-paced and often stressful nature of city living has elevated consumer interest in wellness and relaxation products. Items such as essential oils, bath salts, and aromatherapy solutions are increasingly sought after, as urban consumers look for ways to manage stress and incorporate moments of tranquility into their busy lifestyles. This shift has broadened the scope of personal care beyond basic hygiene to include holistic well-being.

Rising disposable incomes in urban areas further support the growth of the personal care ingredients market. Consumers are now willing to invest in premium and innovative products that provide not only efficacy but also a sense of indulgence and luxury. This trend drives demand for ingredients that enhance product performance and deliver visible results, fostering brand loyalty and repeat purchases. The global health and wellness movement has amplified consumer preference for natural and organic ingredients. The clean beauty trend, emphasizing safety, transparency, and environmental responsibility, has increased the demand for sustainable and non-toxic formulations. Consumers are more informed and selective about the ingredients they apply, favoring products that align with their values around health and sustainability.

In response, manufacturers are investing heavily in research and development to create innovative, high-performance, and eco-friendly ingredients. Urbanization and evolving lifestyles are thus key growth drivers for the personal care ingredients market, with continued innovation and sustainability commitments shaping the future landscape of the industry.

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.

Key Market Trends

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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. Also, 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.

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:

- o Emollients
- o Emulsifiers
- o Surfactants
- o Rheology Modifiers
- o Active Ingredients
- o Others

□ Personal Care Ingredients Market, By Application:

- o Skin Care
- o Hair Care
- o Oral Care
- o Make-Up
- o Others

□ Personal Care Ingredients Market, By Region:

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- o North America
 - United States
 - Canada
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- o Europe
 - France
 - United Kingdom
 - Italy
 - Germany
 - Spain
- o Asia-Pacific
 - China
 - India
 - Japan
 - Australia
 - South Korea
- o South America
 - Brazil
 - Argentina
 - Colombia
- o Middle East & Africa
 - South Africa
 - Saudi Arabia
 - UAE
 - 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, 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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