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Cosmetic & Toiletry Chemicals

Industry Study with Forecasts for **2016 & 2021**

Study #2865 | April 2012 | \$4900 | 364 pages

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The changing habits of baby boomers and consumers who prefer personal care products be from renewable and natural materials will aid healthy gains in cosmetic and toiletry products.

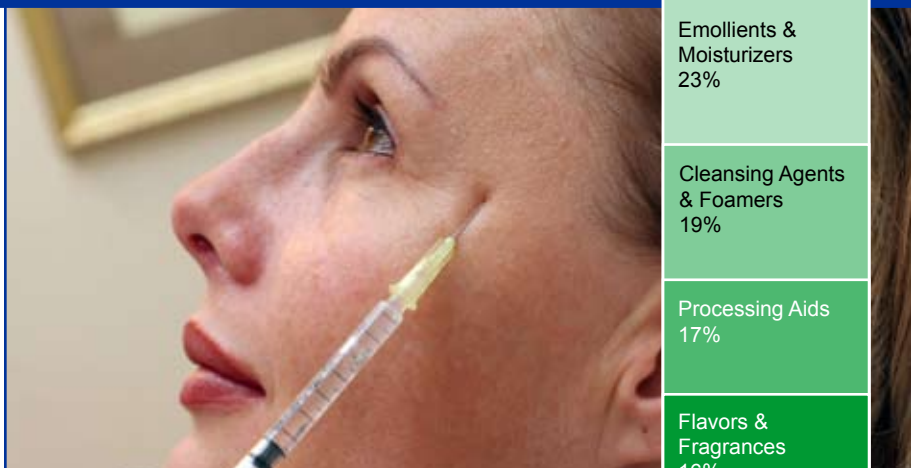
US demand to grow nearly 5% per year through 2016

US demand for cosmetic and toiletry chemicals is forecast to rise 4.9 percent per year to \$9.4 billion in 2016. Gains will be aided by healthy increases in sales of cosmetic and toiletry products, particularly those appealing to baby boomers, who favor products with active ingredients to reduce the signs of aging; and to consumers who prefer that their personal care products be sourced from renewable and natural materials. These product types are typically more costly than inactive or synthetic materials, which will boost dollar gains.

Botanical extracts to exhibit fastest gains

Botanical extracts are expected to post the most rapid gains in demand among cosmetic and toiletry chemicals through 2016. These advances will reflect the favorable natural profile of extracts, which many consumers perceive as being more healthful and beneficial than synthetic chemicals. Traditional materials, such as petroleum-based oils and waxes, will register limited gains going forward as consumers increasingly prefer products formulated with recognizable ingredients, such as those they may find in their own kitchens (e.g., essential oils, aloe vera). In addition to natural ingredient content, consumers also increasingly expect dramatic, visible results from such products as anti-aging cosmetics and toiletries, driving demand for active ingredients such as enzymes and amino acids.

US Cosmetic & Toiletry Chemical Demand, 2016 (\$9.4 billion)



Emollients, moisturizing agents, specialty additives to grow most rapidly

High value raw materials with mass consumer appeal -- such as exotic essential oils sourced from various global locations -- are being increasingly utilized to invigorate sales. Many of these products also benefit from the perception that they are less irritating and more gentle than commodity chemicals. Emollients and moisturizing agents, and specialty additives will see the fastest growth in demand through 2016, as consumers expect higher performance from their toiletries. Active ingredients in particular will see above average gains among specialty additives.

Several consumer segments, historically under-served or not directly served by available personal care items, are seeing more targeted formulations designed for their specific needs. For example, men's products are a niche poised for rapid growth over the coming years, as society slowly lifts the taboo of male grooming with multifunctional toiletries (e.g., body wash that also serves as shaving gel). Ethnic markets have already begun to experience large growth as cosmetics and shampoos formulated for African Americans, Asian Americans, and Hispanics have entered the market. Younger and older consumers are also seeing more products geared toward their developmental physiology -- such as face soaps for adolescents and anti-wrinkle creams for those older in years.

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Sample Text, Table & Chart

FUNCTIONS

Preservatives

Demand for preservatives in cosmetics and toiletries is growing rapidly. Demand is projected to reach \$1.5 billion in 2016. Growth of preservatives in cosmetics and toiletries is driven by the introduction of new products, preservatives offer improved stability, increased efficiency, and with the use of preservatives, increased requirements for preservatives, as these systems demand more preservatives. Restricting the use of preservatives will be a major challenge for preservatives. Restricting the use of preservatives which continues to slow the introduction of new preservatives, despite their obvious benefits, will also limit gains. Another restraining factor is manufacturer's reluctance to reduce the level of preservatives due to the potential for skin irritation and to limit the number of preservatives listed on product labels.

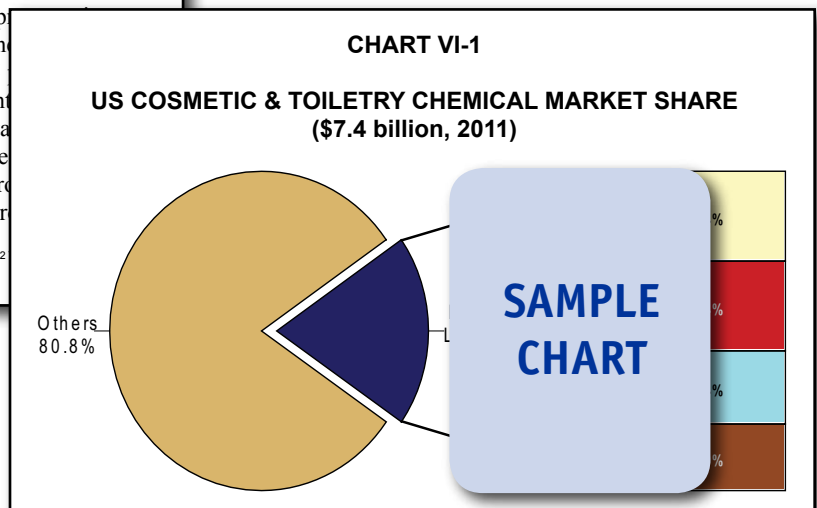
Most cosmetic and toiletry product formulations incorporate preservatives at loading rates of one percent or less, with fat- and water-based products generally requiring higher loadings than powder-based products due to their higher susceptibility to bacterial growth and spoilage. The growing popularity of botanical ingredients increases the need for preservatives, as these ingredients are especially vulnerable to contamination by bacteria during production or attack by microbes while in the formulation itself. Although antimicrobial agents and other preservatives account for a only a small portion of the total weight of the finished product, the selection, incorporation, and loading levels of preservatives is vital to the safety, shelf life, and performance of the finished product. For instance, while a mascara product may only contain 0.5 percent preservatives by weight, it may use four or five different preservatives (methyl paraben, ethyl paraben, propyl paraben, and other standard preservatives) to achieve a desired effect. While preservatives force a manufacturer to list all of these ingredients on the product label, it allows for greater protection against a wider range of microorganisms.

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TABLE III-2
SURFACTANT DEMAND IN COSMETICS & TOILETRIES
(million dollars)

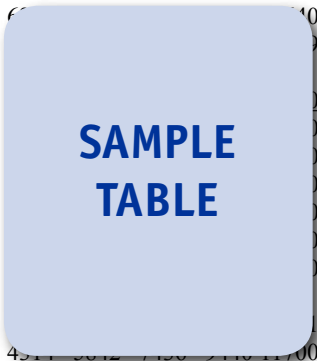
Item	2001	2006	2011	2016	2021
Cosmetic & Toiletry Shpts (mil 2005\$)					
lb surfactants/000\$ C&T					
Surfactant Demand (mil lb)					
\$/lb					
Surfactant Demand					
Anionic					
Cationic					
Nonionic					
Amphoteric					
% surfactants					
Cosmetic & Toiletry Chemical Demand					



Sample Profile, Table & Forecast

TABLE V-3
SKIN CARE PRODUCT CHEMICAL DEMAND
 (million dollars)

Item	2001	2006	2011	2016	2021
Skin Care Product Shipments \$ chemicals/\$ skin care product					
Skin Care Product Chemical Demand					
Emollients & Moisturizing Agents					
Fragrances & Flavors					
Active Ingredients					
Cleansing Agents & Foamers					
Conditioning Agents					
Other					
% skin care products Cosmetic/Toiletry Chemical Demand	45.17	50.12	51.50	51.16	51.00



COMPANY PROFILES

Terry Laboratories Incorporated
 7005 Technology Drive
 Melbourne, FL 32904
 321-259-1100
 http://www.terry-labs.com

Annual Sales: \$100 million
 Employees: 100

Key Products: Aloe vera-based products, and specialty products; and

Terry Laboratories is a manufacturer of aloe vera-based products. The privately held company distributes these products in more than 60 countries.

The Company participates in the US cosmetic and toiletry chemicals industry via the production of aloe vera gels, concentrates, oil extracts, powders, and specialty products. Terry Laboratories reports that it is the world's largest manufacturer of aloe vera extracts and concentrates.

Terry Laboratories' aloe vera gels comprise single-strength types, while concentrates are made in liquid and whole-leaf varieties. The Company sells aloe vera powders in TERRA-PURE non-preserved, TERRA-SPRAY spray-dried, and TERRA-DRY freeze-dried types. Among Terry Laboratories' specialty products are SHEALOE aloe vera and shea butter blends and ALOE-MOIST blends of glycerin and aloe vera. A number of the Company's aloe vera products are certified organic by the US Department of Agriculture (USDA). These products can be used in the production of cosmetics and toiletries, health and beauty aids, industrial soaps, detergents, textiles, and latex gloves.

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"Demand for chemicals used in the formulation of skin care products is forecast to increase 5.8 percent annually to \$2.9 billion in 2016. The skin care market will see above average chemical demand growth, largely due to healthy expansion in the over-55 population, which is fueling rapid sales of skin creams and lotions, and serums, as well as non-drying skin cleansers, and higher requirements for therapeutic and other value added actives."
 --Section V, pg. 189

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OTHER STUDIES

World Flavors & Fragrances

Flavor and fragrance demand will rise 4.4 percent annually to \$26.5 billion in 2016. The most robust gains will be realized in the developing economies of the Asia/Pacific region, Central and South America, and the Africa/Mideast region. Increasing consumer interest in more expensive natural products will drive value demand. This study analyzes the \$21.3 billion world flavor and fragrance industry, with forecasts for 2016 and 2021 by product, market, world region and for 18 major countries. The study also evaluates company market share and profiles industry players.
 #2952 September 2012..... \$6100

Industrial & Institutional (I&I) Cleaning Chemicals

Demand in the US for industrial and institutional (I&I) cleaning chemicals will increase 3.7 percent per year to \$11 billion in 2016. Disinfectants and sanitizers and hand cleansers will be the fastest growing products. The manufacturing market will lead gains, driven by the food and beverage processing and fabricated metals processing segments. This study analyzes the \$9.3 billion US I&I cleaning chemical industry, with forecasts for 2016 and 2021 by market, product and raw material. The study also evaluates company market share and profiles industry players.
 #2916 July 2012..... \$5100

Silicones

US demand for silicones is forecast to climb 5.6 percent annually to \$4.1 billion in 2016. Silicone resins and elastomers will be the fastest growing products, with elastomers overtaking silicone fluids as the largest segment by 2016. The industrial market will remain dominant while the construction segment grows the fastest as it rebounds from previous declines. This study analyzes the \$3.1 billion US silicone industry, with forecasts for 2016 and 2021 by product, market and application. It also evaluates company market share and profiles industry players.
 #2879 April 2012 \$4900

World Enzymes

World enzyme demand will rise 6.8 percent annually to \$8.0 billion in 2015. Growth will be led by enzymes used in the diagnostic, research and biotechnology, animal feed, and food and beverage markets. The fastest regional growth will be in the smaller markets of Central and South America and the Africa/Mideast region. This study analyzes the \$5.8 billion world enzyme industry, with forecasts for 2015 and 2020 by product, market, world region and for 16 major countries. The study also evaluates company market share and profiles industry players.
 #2824 December 2011 \$6100

Alternative Sweeteners

US demand for alternative sweeteners is expected to advance 3.3 percent annually through 2015 to \$1.4 billion. Gains will be led by relatively new entrants such as the stevia extract reb-A. The more mature products -- high intensity sweeteners (such as aspartame) and polyols (including sorbitol) -- will see more restrained, though still healthy, growth. This study analyzes the \$1.2 billion US alternative sweetener industry, with forecasts for 2015 and 2020 by product and market. The study also evaluates company market share and profiles industry players.
 #2819 December 2011 \$4900

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