

# GLOBAL MARKETS FOR CHEMICALS FOR COSMETICS & TOILETRIES



CHM018H  
June 2015

Srinivasa Rajaram  
*Project Analyst*

ISBN: 1-62296-094-7



**BCC Research**  
49 Walnut Park, Building 2  
Wellesley, MA 02481 USA  
866-285-7215 (toll-free within the USA),  
or (+1) 781-489-7301  
[www.bccresearch.com](http://www.bccresearch.com)  
[info@bccresearch.com](mailto:info@bccresearch.com)

**TABLE OF CONTENTS**

<b>TOPIC</b>	<b>PAGE NO.</b>
CHAPTER 1 INTRODUCTION	2
STUDY GOALS AND OBJECTIVES	2
REASONS FOR DOING THIS STUDY	2
SCOPE AND FORMAT	2
CONTRIBUTION OF THE STUDY AND INTENDED AUDIENCE	3
INFORMATION SOURCES	3
ANALYST'S CREDENTIALS	3
RELATED BCC RESEARCH REPORTS	3
BCC RESEARCH WEBSITE	4
DISCLAIMER	4
CHAPTER 2 SUMMARY	6
<i>SUMMARY TABLE GLOBAL MARKET FOR FUNCTIONAL INGREDIENTS USED IN COSMETIC AND TOILETRY PRODUCTS, THROUGH 2021 (\$ MILLIONS)</i>	7
<i>SUMMARY FIGURE GLOBAL MARKET FOR FUNCTIONAL INGREDIENTS USED IN COSMETIC AND TOILETRY PRODUCTS, 2014-2021 (\$ MILLIONS)</i>	7
CHAPTER 3 OVERVIEW	9
DEFINITION OF THE INDUSTRY	9
CONCEPTS IN THE INDUSTRY	9
IMPORTANCE OF THE INDUSTRY	9
LIFE-CYCLE ASSESSMENT OF COSMETIC INGREDIENTS	9
LIFE-CYCLE STAGES OF COSMETIC INGREDIENTS	10
TECHNOLOGY LIFE CYCLE	10
HISTORY OF COSMETICS	11
FRAGRANCE AND FLAVOR HISTORY	12
LIPSTICK HISTORY	12
TOOTHPASTE HISTORY	13
DEVELOPMENTS IN COSMETIC INGREDIENTS	13
INCREASING DEMAND FOR NATURAL PRODUCTS	13
NANOMATERIALS AS COSMETIC INGREDIENTS	14
FUTURE APPLICATIONS FOR NANOTECHNOLOGY	15
NEW IDEAS IN PACKAGING	16
GOVERNMENT REGULATIONS	16
COSMETIC AND TOILETRY CHEMICALS OF CONCERN	16
REGULATIONS FOR COSMETIC INGREDIENTS	20
COSMETICS AND TOILETRIES INDUSTRY REGULATIONS AND STANDARDS	21
ORGANIC COSMETIC STANDARDS	22
Production Standards	22
Organic Content	22
Packaging Standards	22
U.S. Standards for Organic Products	23
European Standards for Organic Products	23
ENVIRONMENTAL SAFETY	25
CHAPTER 4 MARKET FOR COSMETIC AND TOILETRY INGREDIENTS	27

<b>TOPIC</b>	<b>PAGE NO.</b>
CLASSIFICATION OF COSMETIC AND TOILETRY INGREDIENTS	27
CLASSIFICATION BY PRODUCT GROUPS	27
<i>TABLE 1 GLOBAL MARKET FOR COSMETIC AND TOILETRY INGREDIENTS BY PRODUCT GROUP, THROUGH 2021 (\$ MILLIONS)</i>	27
<i>FIGURE 1 GLOBAL MARKET FOR COSMETIC AND TOILETRY INGREDIENTS BY PRODUCT GROUP, 2014-2021 (\$ MILLIONS)</i>	28
CLASSIFICATION BY FUNCTION	28
<i>TABLE 2 GLOBAL MARKET FOR COSMETIC AND TOILETRY INGREDIENTS BY FUNCTION, THROUGH 2021 (\$ MILLIONS)</i>	29
<i>FIGURE 2 GLOBAL MARKET FOR COSMETIC AND TOILETRY INGREDIENTS BY FUNCTION, 2014-2021 (\$ MILLIONS)</i>	29
REGIONAL MARKETS FOR COSMETIC AND TOILETRY INGREDIENTS	30
<i>TABLE 3 GLOBAL MARKET FOR COSMETIC AND TOILETRY INGREDIENTS BY REGION, THROUGH 2021 (\$ MILLIONS)</i>	31
<i>FIGURE 3 GLOBAL MARKET FOR COSMETIC AND TOILETRY INGREDIENTS BY REGION, 2014-2021 (\$ MILLIONS)</i>	31
NORTH AMERICAN COSMETIC AND TOILETRY INGREDIENTS MARKET	31
<i>TABLE 4 NORTH AMERICAN MARKET FOR COSMETIC AND TOILETRY INGREDIENTS, THROUGH 2021 (\$ MILLIONS)</i>	32
EUROPEAN COSMETIC AND TOILETRY INGREDIENTS MARKET	32
<i>TABLE 5 EUROPEAN MARKET FOR COSMETIC AND TOILETRY INGREDIENTS, THROUGH 2021 (\$ MILLIONS)</i>	33
ASIA-PACIFIC COSMETIC AND TOILETRY INGREDIENTS MARKET	33
<i>TABLE 6 ASIA-PACIFIC MARKET FOR COSMETIC AND TOILETRY INGREDIENTS, THROUGH 2021 (\$ MILLIONS)</i>	34
REST OF WORLD COSMETIC AND TOILETRY INGREDIENT MARKET	34
<i>TABLE 7 REST OF WORLD MARKET FOR COSMETIC AND TOILETRY INGREDIENTS, THROUGH 2021 (\$ MILLIONS)</i>	34
GLOBAL MARKET FOR SPECIALTY ADDITIVES	35
<i>TABLE 8 GLOBAL MARKET FOR SPECIALTY ADDITIVES BY TYPE, THROUGH 2021 (\$ MILLIONS)</i>	36
<i>FIGURE 4 GLOBAL MARKET FOR SPECIALTY ADDITIVES BY TYPE, 2014-2021 (\$ MILLIONS)</i>	36
REGIONAL MARKETS FOR SPECIALTY ADDITIVES	36
<i>TABLE 9 GLOBAL MARKET FOR SPECIALTY ADDITIVES BY REGION, THROUGH 2021 (\$ MILLIONS)</i>	37
<i>FIGURE 5 GLOBAL MARKET FOR SPECIALTY ADDITIVES BY REGION, 2014-2021 (\$ MILLIONS)</i>	37
North American Market for Specialty Additives	37
<i>TABLE 10 NORTH AMERICAN MARKET FOR SPECIALTY ADDITIVES, THROUGH 2021 (\$ MILLIONS)</i>	38
European Market for Specialty Additives	38
<i>TABLE 11 EUROPEAN MARKET FOR SPECIALTY ADDITIVES, THROUGH 2021 (\$ MILLIONS)</i>	38
Asia-Pacific Market for Specialty Additives	38
<i>TABLE 12 ASIA-PACIFIC MARKET FOR SPECIALTY ADDITIVES, THROUGH 2021 (\$ MILLIONS)</i>	39
Rest of World Market for Specialty Additives	39
<i>TABLE 13 REST OF WORLD MARKET FOR SPECIALTY ADDITIVES, THROUGH 2021 (\$ MILLIONS)</i>	39
GLOBAL MARKET FOR PROCESSING AIDS	40

<b>TOPIC</b>	<b>PAGE NO.</b>
<i>TABLE 14 GLOBAL MARKET FOR PROCESSING AIDS BY TYPE, THROUGH 2021 (\$ MILLIONS)</i>	40
<i>FIGURE 6 GLOBAL MARKET FOR PROCESSING AIDS BY TYPE, 2014-2021 (\$ MILLIONS)</i>	41
REGIONAL MARKETS FOR PROCESSING AIDS	41
<i>TABLE 15 GLOBAL MARKET FOR PROCESSING AIDS BY REGION, THROUGH 2021 (\$ MILLIONS)</i>	41
<i>FIGURE 7 GLOBAL MARKET FOR PROCESSING AIDS BY REGION, 2014-2021 (\$ MILLIONS)</i>	41
North American Market for Processing Aids	42
<i>TABLE 16 NORTH AMERICAN MARKET FOR PROCESSING AIDS, THROUGH 2021 (\$ MILLIONS)</i>	42
European Market for Processing Aids	42
<i>TABLE 17 EUROPEAN MARKET FOR PROCESSING AIDS, THROUGH 2021 (\$ MILLIONS)</i>	43
Asia-Pacific Market for Processing Aids	43
<i>TABLE 18 ASIA-PACIFIC MARKET FOR PROCESSING AIDS, THROUGH 2021 (\$ MILLIONS)</i>	43
Rest of World Market for Processing Aids	44
<i>TABLE 19 REST OF WORLD MARKET FOR PROCESSING AIDS, THROUGH 2021 (\$ MILLIONS)</i>	44
GLOBAL MARKET FOR CLEANSERS AND FOAMERS	44
<i>TABLE 20 GLOBAL MARKET FOR CLEANSERS AND FOAMERS BY TYPE, THROUGH 2021 (\$ MILLIONS)</i>	45
<i>FIGURE 8 GLOBAL MARKET FOR CLEANSERS AND FOAMERS BY TYPE, 2014-2021 (\$ MILLIONS)</i>	45
REGIONAL MARKETS FOR CLEANSERS AND FOAMERS	45
<i>TABLE 21 GLOBAL MARKET FOR CLEANSERS AND FOAMERS BY REGION, THROUGH 2021 (\$ MILLIONS)</i>	46
<i>FIGURE 9 GLOBAL MARKET FOR CLEANSERS AND FOAMERS BY REGION, 2014-2021 (\$ MILLIONS)</i>	46
North American Market for Cleansers and Foams	46
<i>TABLE 22 NORTH AMERICAN MARKET FOR CLEANERS AND FOAMERS, THROUGH 2021 (\$ MILLIONS)</i>	47
European Market for Cleaners and Foams	47
<i>TABLE 23 EUROPEAN MARKET FOR CLEANERS AND FOAMERS, THROUGH 2021 (\$ MILLIONS)</i>	47
Asia-Pacific Market for Cleaners and Foams	47
<i>TABLE 24 ASIA-PACIFIC MARKET FOR CLEANERS AND FOAMERS, THROUGH 2021 (\$ MILLIONS)</i>	48
Rest of World Market for Cleaners and Foams	48
<i>TABLE 25 REST OF WORLD MARKET FOR CLEANERS AND FOAMERS, THROUGH 2021 (\$ MILLIONS)</i>	48
GLOBAL MARKET FOR FRAGRANCES	49
<i>TABLE 26 GLOBAL MARKET FOR FRAGRANCES BY TYPE, THROUGH 2021 (\$ MILLIONS)</i>	49
<i>FIGURE 10 GLOBAL MARKET FOR FRAGRANCES BY TYPE, 2014-2021 (\$ MILLIONS)</i>	49
REGIONAL MARKETS FOR FRAGRANCES	50
<i>TABLE 27 GLOBAL MARKET FOR FRAGRANCES BY REGION, THROUGH 2021 (\$ MILLIONS)</i>	50

<b>TOPIC</b>	<b>PAGE NO.</b>
<i>FIGURE 11 GLOBAL MARKET FOR FRAGRANCES BY REGION, 2014-2021 (\$ MILLIONS)</i>	50
North American Market for Fragrances	51
<i>TABLE 28 NORTH AMERICAN MARKET FOR FRAGRANCES, THROUGH 2021 (\$ MILLIONS)</i>	51
European Market for Fragrances	52
<i>TABLE 29 EUROPEAN MARKET FOR FRAGRANCES, THROUGH 2021 (\$ MILLIONS)</i>	52
Asia-Pacific Market for Fragrances	52
<i>TABLE 30 ASIA-PACIFIC MARKET FOR FRAGRANCES, THROUGH 2021 (\$ MILLIONS)</i>	52
Rest of World Market for Fragrances	53
<i>TABLE 31 REST OF WORLD MARKET FOR FRAGRANCES, THROUGH 2021 (\$ MILLIONS)</i>	53
GLOBAL MARKET FOR MOISTURIZERS	53
<i>TABLE 32 GLOBAL MARKET FOR MOISTURIZERS BY TYPE, THROUGH 2021 (\$ MILLIONS)</i>	54
<i>FIGURE 12 GLOBAL MARKET FOR MOISTURIZERS BY TYPE, 2014-2021 (\$ MILLIONS)</i>	54
REGIONAL MARKETS FOR MOISTURIZERS	55
<i>TABLE 33 GLOBAL MARKET FOR MOISTURIZERS BY REGION, THROUGH 2021 (\$ MILLIONS)</i>	55
<i>FIGURE 13 GLOBAL MARKET FOR MOISTURIZERS BY REGION, 2014-2021 (\$ MILLIONS)</i>	55
North American Market for Moisturizers	56
<i>TABLE 34 NORTH AMERICAN MARKET FOR MOISTURIZERS, THROUGH 2021 (\$ MILLIONS)</i>	56
European Market for Moisturizers	56
<i>TABLE 35 EUROPEAN MARKET FOR MOISTURIZERS, THROUGH 2021 (\$ MILLIONS)</i>	56
Asia-Pacific Market for Moisturizers	57
<i>TABLE 36 ASIA-PACIFIC MARKET FOR MOISTURIZERS, THROUGH 2021 (\$ MILLIONS)</i>	57
Rest of World Market for Moisturizers	57
<i>TABLE 37 REST OF WORLD MARKET FOR MOISTURIZERS, THROUGH 2021 (\$ MILLIONS)</i>	57
GLOBAL MARKET FOR ACTIVE INGREDIENTS	58
<i>TABLE 38 GLOBAL MARKET FOR ACTIVE INGREDIENTS BY TYPE, THROUGH 2021 (\$ MILLIONS)</i>	58
<i>FIGURE 14 GLOBAL MARKET FOR ACTIVE INGREDIENTS BY TYPE, 2014-2021 (\$ MILLIONS)</i>	59
REGIONAL MARKETS FOR ACTIVE INGREDIENTS	59
<i>TABLE 39 GLOBAL MARKET FOR ACTIVE INGREDIENTS BY REGION, THROUGH 2021 (\$ MILLIONS)</i>	59
<i>FIGURE 15 GLOBAL MARKET FOR ACTIVE INGREDIENTS BY REGION, 2014-2021 (\$ MILLIONS)</i>	59
North American Market for Active Ingredients	60
<i>TABLE 40 NORTH AMERICAN MARKET FOR ACTIVE INGREDIENTS, THROUGH 2021 (\$ MILLIONS)</i>	60
European Market for Active Ingredients	60
<i>TABLE 41 EUROPEAN MARKET FOR ACTIVE INGREDIENTS, THROUGH 2021 (\$ MILLIONS)</i>	61
Asia-Pacific Market for Active Ingredients	61
<i>TABLE 42 ASIA-PACIFIC MARKET FOR ACTIVE INGREDIENTS, THROUGH 2021 (\$ MILLIONS)</i>	61

<b>TOPIC</b>	<b>PAGE NO.</b>
Rest of World Market Active Ingredients	62
<i>TABLE 43 REST OF WORLD MARKET FOR ACTIVE INGREDIENTS, THROUGH 2021 (\$ MILLIONS)</i>	62
CHAPTER 5 MARKETS FOR COSMETIC AND TOILETRY INGREDIENTS BY APPLICATION	64
GLOBAL MARKET FOR COSMETIC AND TOILETRY PRODUCTS	64
<i>TABLE 44 GLOBAL MARKET FOR COSMETICS AND TOILETRIES BY APPLICATION, THROUGH 2021 (\$ BILLIONS)</i>	64
<i>FIGURE 16 GLOBAL MARKET FOR COSMETICS AND TOILETRIES BY APPLICATION, 2014-2021 (\$ BILLIONS)</i>	65
GLOBAL MARKET FOR HAIR CARE PRODUCTS	65
GLOBAL MARKET FOR SKIN CARE PRODUCTS	66
GLOBAL MARKET FOR FRAGRANCE PRODUCTS	66
GLOBAL MARKET FOR ORAL CARE PRODUCTS	67
GLOBAL MARKET FOR MAKEUP PRODUCTS	68
GLOBAL MARKET FOR PERSONAL HYGIENE PRODUCTS	68
GLOBAL MARKET FOR BATH AND SHOWER PRODUCTS	69
GLOBAL SHAVING MARKET	69
GLOBAL MARKET FOR BABY CARE PRODUCTS	69
GLOBAL MARKET FOR NAIL CARE PRODUCTS	70
GLOBAL TREND TOWARD NATURAL PRODUCTS	70
REGIONAL MARKETS FOR COSMETICS AND TOILETRIES	71
North American Market	71
European Market	71
Asia-Pacific Market	71
Rest of World Market	71
<i>TABLE 45 GLOBAL MARKET FOR COSMETICS AND TOILETRIES BY REGION, THROUGH 2021 (\$ BILLIONS)</i>	72
<i>FIGURE 17 GLOBAL MARKET FOR COSMETICS AND TOILETRIES BY REGION, 2014-2021 (\$ BILLIONS)</i>	72
GLOBAL MARKET FOR COSMETICS AND TOILETRY INGREDIENTS BY APPLICATION	72
<i>TABLE 46 GLOBAL MARKET FOR COSMETIC AND TOILETRY INGREDIENTS BY APPLICATION, THROUGH 2021 (\$ MILLIONS)</i>	73
<i>TABLE 18 ASIA-PACIFIC MARKET FOR PROCESSING AIDS, THROUGH 2021 (\$ MILLIONS)</i>	73
APPLICATIONS FOR SPECIALTY ADDITIVES	74
<i>TABLE 47 GLOBAL MARKET FOR SPECIALTY ADDITIVES USED IN COSMETICS AND TOILETRIES BY APPLICATION, THROUGH 2021 (\$ MILLIONS)</i>	74
<i>FIGURE 19 GLOBAL MARKET FOR SPECIALTY ADDITIVES USED IN COSMETICS AND TOILETRIES BY APPLICATION, 2014-2021 (\$ MILLIONS)</i>	74
APPLICATIONS FOR PROCESSING AIDS	75
<i>TABLE 48 GLOBAL MARKET FOR PROCESSING AIDS USED IN COSMETICS AND TOILETRIES BY APPLICATION, THROUGH 2021 (\$ MILLIONS)</i>	76
<i>FIGURE 20 GLOBAL MARKET FOR PROCESSING AIDS USED IN COSMETICS AND TOILETRIES BY APPLICATION, 2014-2021 (\$ MILLIONS)</i>	76
APPLICATIONS FOR CLEANSERS AND FOAMERS	77
<i>TABLE 49 GLOBAL MARKET FOR CLEANSERS AND FOAMERS USED IN COSMETICS AND TOILETRIES BY APPLICATION, THROUGH 2021 (\$ MILLIONS)</i>	77

<b>TOPIC</b>	<b>PAGE NO.</b>
<i>FIGURE 21 GLOBAL MARKET FOR CLEANSERS AND FOAMERS USED IN COSMETICS AND TOILETRIES BY APPLICATION, 2014-2021 (\$ MILLIONS)</i>	77
APPLICATIONS FOR FRAGRANCES	78
<i>TABLE 50 GLOBAL MARKET FOR FRAGRANCES USED IN COSMETICS AND TOILETRIES BY APPLICATION, THROUGH 2021 (\$ MILLIONS)</i>	78
<i>FIGURE 22 GLOBAL MARKET FOR FRAGRANCES USED IN COSMETICS AND TOILETRIES BY APPLICATION, 2014-2021 (\$ MILLIONS)</i>	79
APPLICATIONS FOR MOISTURIZERS	79
<i>TABLE 51 GLOBAL MARKET FOR MOISTURIZERS USED IN COSMETICS AND TOILETRIES BY APPLICATION, THROUGH 2021 (\$ MILLIONS)</i>	80
<i>FIGURE 23 GLOBAL MARKET FOR MOISTURIZERS USED IN COSMETICS AND TOILETRIES BY APPLICATION, 2014-2021 (\$ MILLIONS)</i>	80
APPLICATIONS FOR ACTIVE INGREDIENTS	81
<i>TABLE 52 GLOBAL MARKET FOR ACTIVE INGREDIENTS USED IN COSMETICS AND TOILETRIES BY APPLICATION, THROUGH 2021 (\$ MILLIONS)</i>	81
<i>FIGURE 24 GLOBAL MARKET FOR ACTIVE INGREDIENTS USED IN COSMETICS AND TOILETRIES BY APPLICATION, 2014-2021 (\$ MILLIONS)</i>	81
GLOBAL MARKET FOR HAIR CARE PRODUCT INGREDIENTS	82
<i>TABLE 53 GLOBAL MARKET FOR INGREDIENTS USED IN HAIR CARE PRODUCTS, THROUGH 2021 (\$ MILLIONS)</i>	83
<i>FIGURE 25 GLOBAL MARKET FOR INGREDIENTS USED IN HAIR CARE PRODUCTS, 2014-2021 (\$ MILLIONS)</i>	83
GLOBAL MARKET FOR SKIN CARE PRODUCT INGREDIENTS	84
<i>TABLE 54 GLOBAL MARKET FOR INGREDIENTS USED IN SKIN CARE PRODUCTS THROUGH 2021 (\$ MILLIONS)</i>	84
<i>FIGURE 26 GLOBAL MARKET FOR INGREDIENTS USED IN SKIN CARE PRODUCTS, 2014-2021 (\$ MILLIONS)</i>	84
GLOBAL MARKET FOR MAKEUP PRODUCT INGREDIENTS	85
<i>TABLE 55 GLOBAL MARKET FOR INGREDIENTS USED IN MAKEUP PRODUCTS, THROUGH 2021 (\$ MILLIONS)</i>	85
<i>FIGURE 27 GLOBAL MARKET FOR INGREDIENTS USED IN MAKEUP PRODUCTS, 2014-2021 (\$ MILLIONS)</i>	85
GLOBAL MARKET FOR BATH AND SHOWER PRODUCT INGREDIENTS	86
<i>TABLE 56 GLOBAL MARKET FOR INGREDIENTS USED IN BATH AND SHOWER PRODUCTS, THROUGH 2021 (\$ MILLIONS)</i>	86
<i>FIGURE 28 GLOBAL MARKET FOR INGREDIENTS USED IN BATH AND SHOWER PRODUCTS, 2014-2021 (\$ MILLIONS)</i>	87
GLOBAL MARKET FOR FRAGRANCE PRODUCT INGREDIENTS	87
<i>TABLE 57 GLOBAL MARKET FOR INGREDIENTS USED IN FRAGRANCE PRODUCTS, THROUGH 2021 (\$ MILLIONS)</i>	88
<i>FIGURE 29 GLOBAL MARKET FOR INGREDIENTS USED IN FRAGRANCE PRODUCTS, 2014-2021 (\$ MILLIONS)</i>	88
GLOBAL MARKET FOR ORAL CARE PRODUCT INGREDIENTS	89
<i>TABLE 58 GLOBAL MARKET FOR INGREDIENTS USED IN ORAL CARE PRODUCTS, THROUGH 2021 (\$ MILLIONS)</i>	89
<i>FIGURE 30 GLOBAL MARKET FOR INGREDIENTS USED IN ORAL CARE PRODUCTS, 2014-2021 (\$ MILLIONS)</i>	89
GLOBAL MARKET FOR PERSONAL HYGIENE PRODUCT INGREDIENTS	90
<i>TABLE 59 GLOBAL MARKET FOR INGREDIENTS USED IN PERSONAL HYGIENE PRODUCTS, THROUGH 2021 (\$ MILLIONS)</i>	90

<b>TOPIC</b>	<b>PAGE NO.</b>
<i>FIGURE 31 GLOBAL MARKET FOR INGREDIENTS USED IN PERSONAL HYGIENE PRODUCTS, 2014-2021 (\$ MILLIONS)</i>	90
GLOBAL MARKET FOR SHAVING PRODUCT INGREDIENTS	91
<i>TABLE 60 GLOBAL MARKET FOR INGREDIENTS USED IN SHAVING PRODUCTS, THROUGH 2021 (\$ MILLIONS)</i>	91
<i>FIGURE 32 GLOBAL MARKET FOR INGREDIENTS USED IN SHAVING PRODUCTS, 2014-2021 (\$ MILLIONS)</i>	92
GLOBAL MARKET FOR BABY CARE PRODUCT INGREDIENTS	92
<i>TABLE 61 GLOBAL MARKET FOR INGREDIENTS USED IN BABY CARE PRODUCTS, THROUGH 2021 (\$ MILLIONS)</i>	93
<i>FIGURE 33 GLOBAL MARKET FOR INGREDIENTS USED IN BABY CARE PRODUCTS, 2014-2021 (\$ MILLIONS)</i>	93
GLOBAL MARKET FOR NAIL CARE PRODUCT INGREDIENTS	93
<i>TABLE 62 GLOBAL MARKET FOR INGREDIENTS USED IN NAIL CARE PRODUCTS, THROUGH 2021 (\$ MILLIONS)</i>	94
<i>FIGURE 34 GLOBAL MARKET FOR INGREDIENTS USED IN NAIL CARE PRODUCTS, 2014-2021 (\$ MILLIONS)</i>	94
GLOBAL MARKET FOR MISCELLANEOUS PRODUCT INGREDIENTS	95
<i>TABLE 63 GLOBAL MARKET FOR INGREDIENTS USED IN MISCELLANEOUS PRODUCTS, THROUGH 2021 (\$ MILLIONS)</i>	95
<i>FIGURE 35 GLOBAL MARKET FOR INGREDIENTS USED IN MISCELLANEOUS PRODUCTS, 2014-2021 (\$ MILLIONS)</i>	95
CHAPTER 6 CLASSIFICATION OF COSMETIC APPLICATIONS	97
COSMETICS AND TOILETRIES	97
<i>TABLE 64 CLASSIFICATION OF COSMETIC AND TOILETRY APPLICATIONS</i>	97
COSMETIC AND TOILETRY INGREDIENTS	98
INGREDIENT CLASSIFICATION BY PRODUCT GROUP	99
<i>TABLE 65 COSMETIC AND TOILETRY INGREDIENTS BY PRODUCT GROUP</i>	99
INGREDIENT CLASSIFICATION BY FUNCTION	100
<i>TABLE 66 COSMETIC AND TOILETRY INGREDIENTS BY FUNCTION</i>	100
DESCRIPTION OF VARIOUS FUNCTIONAL INGREDIENTS	101
CLEANSING AGENTS AND FOAMERS	101
SURFACTANTS	101
Surfactant Uses	101
Surfactant Classification Based on Feedstock	102
Surfactant Classification Based on Product Group	102
Anionic Surfactants	102
Cationic Surfactants	103
Nonionic Surfactants	103
Amphoteric and Zwitterionic Surfactants	104
Surfactant Innovations	104
FOAMERS	104
MOISTURIZING AGENTS	104
<i>TABLE 67 MOISTURIZING AGENTS AND THEIR MODES OF ACTION</i>	105
MOISTURIZING TREATMENTS	105
Humectants	105
Occlusives	106
Emollients	106



<b>TOPIC</b>	<b>PAGE NO.</b>
Proteins	107
FRAGRANCES	107
PROCESSING AIDS	107
POLYMERS	108
Polymer Classification	108
Natural Polymers	108
Protein Polymers	108
Synthetic Polymers	108
Functions of Synthetic Polymers	109
Thickeners and Gelling Polymers	109
Fixatives and Styling Polymers	109
Conditioning Polymers	109
Silicones: Multifunction Polymers	109
<i>TABLE 68 SILICONE FUNCTIONS IN SKIN CARE AND HAIR CARE PRODUCTS</i>	110
SOLVENTS AND STABILIZERS	110
EMULSIFIERS	110
PROPELLANTS	111
VISCOSITY-CONTROL AGENTS	111
ACTIVE INGREDIENTS	111
PLANT EXTRACTS, OILS AND WAXES	111
Natural Oils	112
Essential Oils	112
Plant Oils	112
Rosewood Oil	113
Sandalwood Oil	113
Cedarwood Oil	113
Cinnamon Oil	113
Natural Butters	113
Synthetic Oils	113
<i>TABLE 69 IMPORTANT SYNTHETIC OILS</i>	114
Waxes	114
Wax Classification	115
Natural Waxes	115
Beeswax	115
Lanolin	116
Spermaceti Wax	116
Carnauba Wax	116
Candelilla Wax	116
Jojoba Wax	116
Ozokerite	116
Paraffin Wax	117
Microcrystalline Wax	117
Ceresin Wax	117
Petrolatum	117
Synthetic Waxes	118
LIGHT-PROTECTION FILMS	118
VITAMINS	118

<b>TOPIC</b>	<b>PAGE NO.</b>
PROTEINS	118
FRUIT ACIDS	119
SPECIALTY ADDITIVES	119
CONDITIONING AGENTS	119
PRESERVATIVES	119
COLORANTS	120
Organic Colorants	120
Inorganic Colorants	121
Natural Colorants	121
ALCOHOLS	122
ANTIOXIDANTS	122
THICKENERS	123
COSMETIC AND TOILETRY INGREDIENTS BY APPLICATIONS	123
SKIN CARE PRODUCTS	123
Face and Neck Creams and Lotions	123
Body and Hand Creams and Lotions	123
Cleansers	124
Moisturizers	124
Body and Dusting Powders	124
Foot Powders and Sprays	124
Sunscreen and Suntan Products	124
Sunblock and Sunscreen Gels, Creams and Liquids	124
Sunless Tanners	125
HAIR CARE PRODUCTS	125
Hair Conditioners	126
Hair Sprays	126
Shampoos and Rinses	126
Tonics and Dressings	126
Hair Straighteners and Relaxers	126
Permanent Waves	126
Hair Dyes and Colors	126
Hair Bleaches	127
Hair Tints and Rinses	127
BATH AND SHOWER PRODUCTS	127
Bath Oils, Tablets and Salts	127
Bath Capsules	128
Bubble Baths	128
FRAGRANCE PRODUCTS	128
Colognes, Perfumes and Fragrance Mists	128
Ingredients of Fragrance Products	128
MAKEUP PRODUCTS	129
Facial Makeup Products	129
Lip Colors	129
Cheek Colors	129
Face Powders	129
Foundations	130
Concealers	130

<b>TOPIC</b>	<b>PAGE NO.</b>
Eye Makeup Products	130
Eyebrow Pencils	130
Eyeliners	130
Eye Color Products	131
Eye Makeup Removers	131
Mascaras	131
<b>NAIL CARE PRODUCTS</b>	131
Cuticle Oils, Creams and Lotions	131
Exfoliators	132
Conditioners	132
Removers	132
Nail Polishes	132
Artificial Nail Extensions	133
Manicure and Pedicure Products	133
<b>ORAL HYGIENE PRODUCTS</b>	133
Toothpastes	133
Toothpaste Active Agents	133
Antimicrobial Agents	134
Anti-tartar Agents	134
Desensitizing Agents	134
Other Ingredients	134
Abrasives	134
Flavors	135
Humectants	135
Mouthwashes	135
Breath Fresheners	135
<b>PERSONAL HYGIENE PRODUCTS</b>	135
Soaps	135
Deodorants	136
Antiperspirants	136
Douches	136
Feminine Deodorants	136
<b>SHAVING PRODUCTS</b>	136
Shaving Soaps	137
Shaving Creams	137
Pre-shave Lotions	137
Aftershave Lotions	137
<b>BABY CARE PRODUCTS</b>	137
Baby Shampoos	137
Baby Lotions, Oils, Powders and Creams	138
<b>COSMETIC MANUFACTURING PROCESSES</b>	138
PERSONAL HYGIENE, SKIN CARE, HAIR CARE AND COLOR COSMETICS	138
NAIL POLISH	139
FACE POWDER AND BLUSHER	139
PERFUMES	139
Production of Synthetic or Semisynthetic Odoriferous Compounds	140
Blending	140

<b>TOPIC</b>	<b>PAGE NO.</b>
DENTAL PRODUCTS	140
INNOVATIONS IN PRODUCT DEVELOPMENT	141
RISK ASSESSMENT	141
ANALYSIS OF SAMPLE U.S. PATENTS	142
<i>TABLE 70 U.S. PATENTS FOR COSMETIC AND TOILETRY INGREDIENTS BY COUNTRY, 2011 TO 2014 (NUMBER)</i>	143
<i>TABLE 71 U.S. PATENTS FOR COSMETIC AND TOILETRY INGREDIENTS BY TECHNOLOGY TYPE, 2011 TO 2014 (NUMBER)</i>	143
<i>TABLE 72 U.S. PATENTS FOR COSMETIC AND TOILETRY INGREDIENTS BY YEAR, 2011 TO 2014 (NUMBER)</i>	144
<i>TABLE 73 U.S. PATENTS FOR COSMETIC AND TOILETRY INGREDIENTS ISSUED TO COMPANIES AND INDIVIDUALS, 2011 TO 2014 (NUMBER)</i>	144
CHAPTER 7 INDUSTRY STRUCTURE AND COMPETITIVE ANALYSIS	147
DRIVING FORCES OF THE INDUSTRY	147
IMPORTANT INDUSTRY SHIFTS	149
GLOBAL TREND TOWARD NATURAL PRODUCTS	149
RESEARCH AND DEVELOPMENT	150
SKIN CARE PRODUCTS	150
HAIR CARE PRODUCTS	151
ORAL CARE PRODUCTS	151
FRAGRANCE AND FLAVOR PRODUCTS	151
MERGERS AND ACQUISITIONS	151
<i>TABLE 74 MAJOR COSMETIC INGREDIENT MANUFACTURING COMPANY MERGERS AND ACQUISITIONS, JAN. 2012 TO JAN. 2015</i>	153
GLOBAL SALES OF COSMETIC AND TOILETRY INGREDIENTS BY MAJOR COMPANIES	157
<i>TABLE 75 GLOBAL COSMETIC AND TOILETRY INGREDIENT SALES BY MAJOR COMPANIES</i>	158
CHAPTER 8 COMPANY PROFILES	160
COSMETIC AND TOILETRY INGREDIENT MANUFACTURERS	160
AAK AB	160
ACTIVE ORGANICS	161
AJINOMOTO CO. INC.	161
AKEMA FINE CHEMICALS	161
AKZONOBEL SURFACE CHEMISTRY LLC	162
ALKA CHEMICAL INDUSTRIES	163
ARKEMA INC.	163
AROMATICS INTERNATIONAL	164
ASHLAND INC.	164
BASF AKTIENGESELLSCHAFT	165
BASF Schweiz AG	165
BASF Personal Care and Nutrition	165
BIO-BOTANICA	166
BIOCHEMICA INTERNATIONAL	167
BIOSIL TECHNOLOGIES INC.	167
CIBA INC. (SEE BASF)	168
CLARIANT INTERNATIONAL LTD.	168

TOPIC	PAGE NO.
COGNIS GMBH (SEE BASF)	169
COSMETIC RHEOLOGIES LTD.	171
CRODA INTERNATIONAL PLC	171
DANISCO U.S. INC.	173
DOW CHEMICAL CO.	173
DUPONT INDUSTRIAL BIOSCIENCES	174
ECKART GMBH & CO. KG	175
ELEMENTIS PLC	176
EMD CHEMICALS INC.	176
EM INDUSTRIES INC.	177
ERCETIN GUL YAGI SAN. TIC. A.S	177
EVONIK INDUSTRIES AG	178
FENCHEM BIOTEK LTD.	178
FIRMENICH INTERNATIONAL SA	179
GEORGE UHE CO. INC.	180
GIUSTO FARAVELLI SPA	180
GIVAUDAN SUISSE SA	181
GYAN FLAVOURS EXPORT	182
HONEYWELL INTERNATIONAL INC.	182
HUBEI XIANGXI CHEMICAL INDUSTRY CO. LTD.	183
IMPACT COLORS INC.	183
INTERNATIONAL FLAVORS AND FRAGRANCES INC.	184
INTERPOLYMER CORP.	185
JEEN INTERNATIONAL CORP.	185
KIBUN FOOD CHEMIFA CO. LTD.	186
KITOZYME SA	186
LANXESS AG	187
THE LUBRIZOL CORP.	187
NOVOZYMES A/S	188
PROVITAL GROUP	189
ROYAL DSM NV	190
SCHULKE & MAYR GMBH	190
SCIENCEUTICALS	191
SEDERMA SAS	191
SOPHIM	192
SOZIO INC.	192
STEPAN CO.	193
SYMRISE GMBH & CO. KG	193
ULTRA CHEMICAL INC.	194
U.S. COSMETICS CORP.	194
VIVA CORP.	195
WACKER-CHEMIE GMBH	195
COSMETIC AND TOILETRY PRODUCT MANUFACTURERS	196
AVON PRODUCTS INC.	196
BEIERSDORF AG	196
COLGATE-PALMOLIVE CO.	197
COTY INC.	198

<b>TOPIC</b>	<b>PAGE NO.</b>
ELIZABETH ARDEN INC.	198
ESTEE LAUDER CO. INC.	199
LOREAL SA	199
REVLON INC.	200
SHISEIDO INTERNATIONAL CORP.	200
UNILEVER PLC	201
CHAPTER 9 APPENDIX A: PATENTS	203
<i>TABLE 76 PATENT ANALYSIS</i>	203
CHAPTER 10 APPENDIX B: MANUFACTURER DIRECTORY	216
<i>TABLE 77 MANUFACTURERS OF INGREDIENTS OF COSMETICS AND TOILETRIES</i>	216
CHAPTER 11 APPENDIX C: INGREDIENT PROPERTIES AND SAFETY	223
<i>TABLE 78 COSMETIC AND TOILETRY PRODUCT INGREDIENT PROPERTIES AND SAFETY FEATURES</i>	223
CHAPTER 12 APPENDIX D: FUNCTION OF INGREDIENTS	272
<i>TABLE 79 COSMETIC AND TOILETRY INGREDIENT FUNCTIONS</i>	272
CHAPTER 13 APPENDIX E: INFORMATION WEBSITES	283
COSMETIC INGREDIENT SAFETY INFORMATION WEBSITES	283
UNITED STATES	283
INTERNATIONAL	283
OTHER ASSOCIATIONS	283
SCIENTIFIC WEBSITES FOR COSMETIC INGREDIENTS INDUSTRIES	284
CHAPTER 14 APPENDIX F: SAFETY IN COSMETIC INGREDIENTS	288
CHAPTER 15 APPENDIX G: CONSULTANCY ORGANIZATIONS	290
CONSULTANCY ORGANIZATIONS IN COSMETICS AND TOILETRIES	290
CANADIAN COSMETIC, TOILETRY AND FRAGRANCE ASSOCIATION	290
COSMETIC INGREDIENT REVIEW	290
COSMETIC, TOILETRY AND FRAGRANCE ASSOCIATION	290
COSMETIC TOILETRY AND FRAGRANCE ASSOCIATION OF AUSTRALIA INC.	290

**LIST OF TABLES**

<b>TABLE HEADING</b>	<b>PAGE NO.</b>
SUMMARY TABLE GLOBAL MARKET FOR FUNCTIONAL INGREDIENTS USED IN COSMETIC AND TOILETRY PRODUCTS, THROUGH 2021 (\$ MILLIONS)	7
TABLE 1 GLOBAL MARKET FOR COSMETIC AND TOILETRY INGREDIENTS BY PRODUCT GROUP, THROUGH 2021 (\$ MILLIONS)	27
TABLE 2 GLOBAL MARKET FOR COSMETIC AND TOILETRY INGREDIENTS BY FUNCTION, THROUGH 2021 (\$ MILLIONS)	29
TABLE 3 GLOBAL MARKET FOR COSMETIC AND TOILETRY INGREDIENTS BY REGION, THROUGH 2021 (\$ MILLIONS)	31
TABLE 4 NORTH AMERICAN MARKET FOR COSMETIC AND TOILETRY INGREDIENTS, THROUGH 2021 (\$ MILLIONS)	32
TABLE 5 EUROPEAN MARKET FOR COSMETIC AND TOILETRY INGREDIENTS, THROUGH 2021 (\$ MILLIONS)	33
TABLE 6 ASIA-PACIFIC MARKET FOR COSMETIC AND TOILETRY INGREDIENTS, THROUGH 2021 (\$ MILLIONS)	34
TABLE 7 REST OF WORLD MARKET FOR COSMETIC AND TOILETRY INGREDIENTS, THROUGH 2021 (\$ MILLIONS)	34
TABLE 8 GLOBAL MARKET FOR SPECIALTY ADDITIVES BY TYPE, THROUGH 2021 (\$ MILLIONS)	36
TABLE 9 GLOBAL MARKET FOR SPECIALTY ADDITIVES BY REGION, THROUGH 2021 (\$ MILLIONS)	37
TABLE 10 NORTH AMERICAN MARKET FOR SPECIALTY ADDITIVES, THROUGH 2021 (\$ MILLIONS)	38
TABLE 11 EUROPEAN MARKET FOR SPECIALTY ADDITIVES, THROUGH 2021 (\$ MILLIONS)	38
TABLE 12 ASIA-PACIFIC MARKET FOR SPECIALTY ADDITIVES, THROUGH 2021 (\$ MILLIONS)	39
TABLE 13 REST OF WORLD MARKET FOR SPECIALTY ADDITIVES, THROUGH 2021 (\$ MILLIONS)	39
TABLE 14 GLOBAL MARKET FOR PROCESSING AIDS BY TYPE, THROUGH 2021 (\$ MILLIONS)	40
TABLE 15 GLOBAL MARKET FOR PROCESSING AIDS BY REGION, THROUGH 2021 (\$ MILLIONS)	41
TABLE 16 NORTH AMERICAN MARKET FOR PROCESSING AIDS, THROUGH 2021 (\$ MILLIONS)	42
TABLE 17 EUROPEAN MARKET FOR PROCESSING AIDS, THROUGH 2021 (\$ MILLIONS)	43
TABLE 18 ASIA-PACIFIC MARKET FOR PROCESSING AIDS, THROUGH 2021 (\$ MILLIONS)	43
TABLE 19 REST OF WORLD MARKET FOR PROCESSING AIDS, THROUGH 2021 (\$ MILLIONS)	44
TABLE 20 GLOBAL MARKET FOR CLEANSERS AND FOAMERS BY TYPE, THROUGH 2021 (\$ MILLIONS)	45
TABLE 21 GLOBAL MARKET FOR CLEANSERS AND FOAMERS BY REGION, THROUGH 2021 (\$ MILLIONS)	46
TABLE 22 NORTH AMERICAN MARKET FOR CLEANERS AND FOAMERS, THROUGH 2021 (\$ MILLIONS)	47
TABLE 23 EUROPEAN MARKET FOR CLEANERS AND FOAMERS, THROUGH 2021 (\$ MILLIONS)	47
TABLE 24 ASIA-PACIFIC MARKET FOR CLEANERS AND FOAMERS, THROUGH 2021 (\$ MILLIONS)	48
TABLE 25 REST OF WORLD MARKET FOR CLEANERS AND FOAMERS, THROUGH 2021 (\$ MILLIONS)	48

<b>TABLE HEADING</b>	<b>PAGE NO.</b>
TABLE 26 GLOBAL MARKET FOR FRAGRANCES BY TYPE, THROUGH 2021 (\$ MILLIONS)	49
TABLE 27 GLOBAL MARKET FOR FRAGRANCES BY REGION, THROUGH 2021 (\$ MILLIONS)	50
TABLE 28 NORTH AMERICAN MARKET FOR FRAGRANCES, THROUGH 2021 (\$ MILLIONS)	51
TABLE 29 EUROPEAN MARKET FOR FRAGRANCES, THROUGH 2021 (\$ MILLIONS)	52
TABLE 30 ASIA-PACIFIC MARKET FOR FRAGRANCES, THROUGH 2021 (\$ MILLIONS)	52
TABLE 31 REST OF WORLD MARKET FOR FRAGRANCES, THROUGH 2021 (\$ MILLIONS)	53
TABLE 32 GLOBAL MARKET FOR MOISTURIZERS BY TYPE, THROUGH 2021 (\$ MILLIONS)	54
TABLE 33 GLOBAL MARKET FOR MOISTURIZERS BY REGION, THROUGH 2021 (\$ MILLIONS)	55
TABLE 34 NORTH AMERICAN MARKET FOR MOISTURIZERS, THROUGH 2021 (\$ MILLIONS)	56
TABLE 35 EUROPEAN MARKET FOR MOISTURIZERS, THROUGH 2021 (\$ MILLIONS)	56
TABLE 36 ASIA-PACIFIC MARKET FOR MOISTURIZERS, THROUGH 2021 (\$ MILLIONS)	57
TABLE 37 REST OF WORLD MARKET FOR MOISTURIZERS, THROUGH 2021 (\$ MILLIONS)	57
TABLE 38 GLOBAL MARKET FOR ACTIVE INGREDIENTS BY TYPE, THROUGH 2021 (\$ MILLIONS)	58
TABLE 39 GLOBAL MARKET FOR ACTIVE INGREDIENTS BY REGION, THROUGH 2021 (\$ MILLIONS)	59
TABLE 40 NORTH AMERICAN MARKET FOR ACTIVE INGREDIENTS, THROUGH 2021 (\$ MILLIONS)	60
TABLE 41 EUROPEAN MARKET FOR ACTIVE INGREDIENTS, THROUGH 2021 (\$ MILLIONS)	61
TABLE 42 ASIA-PACIFIC MARKET FOR ACTIVE INGREDIENTS, THROUGH 2021 (\$ MILLIONS)	61
TABLE 43 REST OF WORLD MARKET FOR ACTIVE INGREDIENTS, THROUGH 2021 (\$ MILLIONS)	62
TABLE 44 GLOBAL MARKET FOR COSMETICS AND TOILETRIES BY APPLICATION, THROUGH 2021 (\$ BILLIONS)	64
TABLE 45 GLOBAL MARKET FOR COSMETICS AND TOILETRIES BY REGION, THROUGH 2021 (\$ BILLIONS)	72
TABLE 46 GLOBAL MARKET FOR COSMETIC AND TOILETRY INGREDIENTS BY APPLICATION, THROUGH 2021 (\$ MILLIONS)	73
TABLE 18 ASIA-PACIFIC MARKET FOR PROCESSING AIDS, THROUGH 2021 (\$ MILLIONS)	73
TABLE 47 GLOBAL MARKET FOR SPECIALTY ADDITIVES USED IN COSMETICS AND TOILETRIES BY APPLICATION, THROUGH 2021 (\$ MILLIONS)	74
TABLE 48 GLOBAL MARKET FOR PROCESSING AIDS USED IN COSMETICS AND TOILETRIES BY APPLICATION, THROUGH 2021 (\$ MILLIONS)	76
TABLE 49 GLOBAL MARKET FOR CLEANSERS AND FOAMERS USED IN COSMETICS AND TOILETRIES BY APPLICATION, THROUGH 2021 (\$ MILLIONS)	77
TABLE 50 GLOBAL MARKET FOR FRAGRANCES USED IN COSMETICS AND TOILETRIES BY APPLICATION, THROUGH 2021 (\$ MILLIONS)	78
TABLE 51 GLOBAL MARKET FOR MOISTURIZERS USED IN COSMETICS AND TOILETRIES BY APPLICATION, THROUGH 2021 (\$ MILLIONS)	80
TABLE 52 GLOBAL MARKET FOR ACTIVE INGREDIENTS USED IN COSMETICS AND TOILETRIES BY APPLICATION, THROUGH 2021 (\$ MILLIONS)	81
TABLE 53 GLOBAL MARKET FOR INGREDIENTS USED IN HAIR CARE PRODUCTS, THROUGH 2021 (\$ MILLIONS)	83



<b>TABLE HEADING</b>	<b>PAGE NO.</b>
TABLE 54 GLOBAL MARKET FOR INGREDIENTS USED IN SKIN CARE PRODUCTS THROUGH 2021 (\$ MILLIONS)	84
TABLE 55 GLOBAL MARKET FOR INGREDIENTS USED IN MAKEUP PRODUCTS, THROUGH 2021 (\$ MILLIONS)	85
TABLE 56 GLOBAL MARKET FOR INGREDIENTS USED IN BATH AND SHOWER PRODUCTS, THROUGH 2021 (\$ MILLIONS)	86
TABLE 57 GLOBAL MARKET FOR INGREDIENTS USED IN FRAGRANCE PRODUCTS, THROUGH 2021 (\$ MILLIONS)	88
TABLE 58 GLOBAL MARKET FOR INGREDIENTS USED IN ORAL CARE PRODUCTS, THROUGH 2021 (\$ MILLIONS)	89
TABLE 59 GLOBAL MARKET FOR INGREDIENTS USED IN PERSONAL HYGIENE PRODUCTS, THROUGH 2021 (\$ MILLIONS)	90
TABLE 60 GLOBAL MARKET FOR INGREDIENTS USED IN SHAVING PRODUCTS, THROUGH 2021 (\$ MILLIONS)	91
TABLE 61 GLOBAL MARKET FOR INGREDIENTS USED IN BABY CARE PRODUCTS, THROUGH 2021 (\$ MILLIONS)	93
TABLE 62 GLOBAL MARKET FOR INGREDIENTS USED IN NAIL CARE PRODUCTS, THROUGH 2021 (\$ MILLIONS)	94
TABLE 63 GLOBAL MARKET FOR INGREDIENTS USED IN MISCELLANEOUS PRODUCTS, THROUGH 2021 (\$ MILLIONS)	95
TABLE 64 CLASSIFICATION OF COSMETIC AND TOILETRY APPLICATIONS	97
TABLE 65 COSMETIC AND TOILETRY INGREDIENTS BY PRODUCT GROUP	99
TABLE 66 COSMETIC AND TOILETRY INGREDIENTS BY FUNCTION	100
TABLE 67 MOISTURIZING AGENTS AND THEIR MODES OF ACTION	105
TABLE 68 SILICONE FUNCTIONS IN SKIN CARE AND HAIR CARE PRODUCTS	110
TABLE 69 IMPORTANT SYNTHETIC OILS	114
TABLE 70 U.S. PATENTS FOR COSMETIC AND TOILETRY INGREDIENTS BY COUNTRY, 2011 TO 2014 (NUMBER)	143
TABLE 71 U.S. PATENTS FOR COSMETIC AND TOILETRY INGREDIENTS BY TECHNOLOGY TYPE, 2011 TO 2014 (NUMBER)	143
TABLE 72 U.S. PATENTS FOR COSMETIC AND TOILETRY INGREDIENTS BY YEAR, 2011 TO 2014 (NUMBER)	144
TABLE 73 U.S. PATENTS FOR COSMETIC AND TOILETRY INGREDIENTS ISSUED TO COMPANIES AND INDIVIDUALS, 2011 TO 2014 (NUMBER)	144
TABLE 74 MAJOR COSMETIC INGREDIENT MANUFACTURING COMPANY MERGERS AND ACQUISITIONS, JAN. 2012 TO JAN. 2015	153
TABLE 75 GLOBAL COSMETIC AND TOILETRY INGREDIENT SALES BY MAJOR COMPANIES	158
TABLE 76 PATENT ANALYSIS	203
TABLE 77 MANUFACTURERS OF INGREDIENTS OF COSMETICS AND TOILETRIES	216
TABLE 78 COSMETIC AND TOILETRY PRODUCT INGREDIENT PROPERTIES AND SAFETY FEATURES	223
TABLE 79 COSMETIC AND TOILETRY INGREDIENT FUNCTIONS	272

**LIST OF FIGURES**

<b>FIGURE TITLE</b>	<b>PAGE NO.</b>
SUMMARY FIGURE GLOBAL MARKET FOR FUNCTIONAL INGREDIENTS USED IN COSMETIC AND TOILETRY PRODUCTS, 2014-2021 (\$ MILLIONS)	7
FIGURE 1 GLOBAL MARKET FOR COSMETIC AND TOILETRY INGREDIENTS BY PRODUCT GROUP, 2014-2021 (\$ MILLIONS)	28
FIGURE 2 GLOBAL MARKET FOR COSMETIC AND TOILETRY INGREDIENTS BY FUNCTION, 2014-2021 (\$ MILLIONS)	29
FIGURE 3 GLOBAL MARKET FOR COSMETIC AND TOILETRY INGREDIENTS BY REGION, 2014-2021 (\$ MILLIONS)	31
FIGURE 4 GLOBAL MARKET FOR SPECIALTY ADDITIVES BY TYPE, 2014-2021 (\$ MILLIONS)	36
FIGURE 5 GLOBAL MARKET FOR SPECIALTY ADDITIVES BY REGION, 2014-2021 (\$ MILLIONS)	37
FIGURE 6 GLOBAL MARKET FOR PROCESSING AIDS BY TYPE, 2014-2021 (\$ MILLIONS)	41
FIGURE 7 GLOBAL MARKET FOR PROCESSING AIDS BY REGION, 2014-2021 (\$ MILLIONS)	41
FIGURE 8 GLOBAL MARKET FOR CLEANSERS AND FOAMERS BY TYPE, 2014-2021 (\$ MILLIONS)	45
FIGURE 9 GLOBAL MARKET FOR CLEANSERS AND FOAMERS BY REGION, 2014-2021 (\$ MILLIONS)	46
FIGURE 10 GLOBAL MARKET FOR FRAGRANCES BY TYPE, 2014-2021 (\$ MILLIONS)	49
FIGURE 11 GLOBAL MARKET FOR FRAGRANCES BY REGION, 2014-2021 (\$ MILLIONS)	50
FIGURE 12 GLOBAL MARKET FOR MOISTURIZERS BY TYPE, 2014-2021 (\$ MILLIONS)	54
FIGURE 13 GLOBAL MARKET FOR MOISTURIZERS BY REGION, 2014-2021 (\$ MILLIONS)	55
FIGURE 14 GLOBAL MARKET FOR ACTIVE INGREDIENTS BY TYPE, 2014-2021 (\$ MILLIONS)	59
FIGURE 15 GLOBAL MARKET FOR ACTIVE INGREDIENTS BY REGION, 2014-2021 (\$ MILLIONS)	59
FIGURE 16 GLOBAL MARKET FOR COSMETICS AND TOILETRIES BY APPLICATION, 2014-2021 (\$ BILLIONS)	65
FIGURE 17 GLOBAL MARKET FOR COSMETICS AND TOILETRIES BY REGION, 2014-2021 (\$ BILLIONS)	72
FIGURE 19 GLOBAL MARKET FOR SPECIALTY ADDITIVES USED IN COSMETICS AND TOILETRIES BY APPLICATION, 2014-2021 (\$ MILLIONS)	74
FIGURE 20 GLOBAL MARKET FOR PROCESSING AIDS USED IN COSMETICS AND TOILETRIES BY APPLICATION, 2014-2021 (\$ MILLIONS)	76
FIGURE 21 GLOBAL MARKET FOR CLEANSERS AND FOAMERS USED IN COSMETICS AND TOILETRIES BY APPLICATION, 2014-2021 (\$ MILLIONS)	77
FIGURE 22 GLOBAL MARKET FOR FRAGRANCES USED IN COSMETICS AND TOILETRIES BY APPLICATION, 2014-2021 (\$ MILLIONS)	79
FIGURE 23 GLOBAL MARKET FOR MOISTURIZERS USED IN COSMETICS AND TOILETRIES BY APPLICATION, 2014-2021 (\$ MILLIONS)	80
FIGURE 24 GLOBAL MARKET FOR ACTIVE INGREDIENTS USED IN COSMETICS AND TOILETRIES BY APPLICATION, 2014-2021 (\$ MILLIONS)	81
FIGURE 25 GLOBAL MARKET FOR INGREDIENTS USED IN HAIR CARE PRODUCTS, 2014-2021 (\$ MILLIONS)	83
FIGURE 26 GLOBAL MARKET FOR INGREDIENTS USED IN SKIN CARE PRODUCTS, 2014-2021 (\$ MILLIONS)	84
FIGURE 27 GLOBAL MARKET FOR INGREDIENTS USED IN MAKEUP PRODUCTS, 2014-2021 (\$ MILLIONS)	85

<b>FIGURE TITLE</b>	<b>PAGE NO.</b>
FIGURE 28 GLOBAL MARKET FOR INGREDIENTS USED IN BATH AND SHOWER PRODUCTS, 2014-2021 (\$ MILLIONS)	87
FIGURE 29 GLOBAL MARKET FOR INGREDIENTS USED IN FRAGRANCE PRODUCTS, 2014-2021 (\$ MILLIONS)	88
FIGURE 30 GLOBAL MARKET FOR INGREDIENTS USED IN ORAL CARE PRODUCTS, 2014-2021 (\$ MILLIONS)	89
FIGURE 31 GLOBAL MARKET FOR INGREDIENTS USED IN PERSONAL HYGIENE PRODUCTS, 2014-2021 (\$ MILLIONS)	90
FIGURE 32 GLOBAL MARKET FOR INGREDIENTS USED IN SHAVING PRODUCTS, 2014-2021 (\$ MILLIONS)	92
FIGURE 33 GLOBAL MARKET FOR INGREDIENTS USED IN BABY CARE PRODUCTS, 2014-2021 (\$ MILLIONS)	93
FIGURE 34 GLOBAL MARKET FOR INGREDIENTS USED IN NAIL CARE PRODUCTS, 2014-2021 (\$ MILLIONS)	94
FIGURE 35 GLOBAL MARKET FOR INGREDIENTS USED IN MISCELLANEOUS PRODUCTS, 2014-2021 (\$ MILLIONS)	95