



Future Prospects for the Cosmetics Market

Insights from Recent Trade Fairs

*4th South African Conference on Essential and Vegetable
Oils 2026*



the dtic
Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA



Partners in
Transformation
Import Promotion Desk

WHAT WE'LL COVER

1

Celebrating 25 years of SAEOPA — and why associations matter

2

The cosmetics market, globally and in Europe

3

South Africa's export opportunity & trends

4

Why trade fairs matter, and who buys

5

What buyers will ask to see, and a sustainability caution

6

What this means for us

CELEBRATING SAEOPA

25 Years of Building South Africa's Essential & Vegetable Oil Industry



Founded in 2000 as the voice of South Africa's essential and vegetable oil producers

- Represents producers, processors and distributors of essential and vegetable oils across South Africa and the wider SADC region
- GQSP-SA: the UNIDO-backed Global Quality and Standards Programme - anchors SAEOPA's quality and standards work with the support from UNIDO
- Why this matters: associations like SAEOPA aggregate supply into export-ready volumes, build the production quality and standards that make our supply credible to buyers, and give producers a single, credible voice in trade negotiations

SAEOPA × CECOSA

Why supporting associations matters

SAEOPA builds the product

Aggregates production into consistent, traceable volumes.
Delivers the quality systems, bottling guidelines and GQSP-SA technical support that turn a harvest into a specification sheet a buyer can act on.



CECOSA builds the market

The sector specific export council in Public-Private-Partnership with the dtic that puts South African cosmetics, toiletry and fragrance products in front of the buyers and importers who decide what reaches international shelves.

A door only matters if there is something worth carrying through it

Buyers in our In-Cosmetics 2026 market intelligence research said some version of the same thing: they buy documentation, consistency and traceable supply. That has to already exist before anyone reaches a trade fair stand. Good product without market access goes nowhere. Market access without a credible product has nothing to sell.

It is one value chain, not two separate initiatives

THE COSMETICS MARKET GLOBALLY AND IN EUROPE

Still growing, and increasingly natural

US\$338bn

Global cosmetics market value in 2026, projected to reach ~US\$492bn by 2033 (5.5% CAGR)

€104bn

Europe's cosmetics market value in 2024 — about 24% of the €540bn global beauty & personal care market

3rd Largest

Europe's global position, after North America and North Asia (2024) — €11bn direct manufacturing plus €18bn indirect

€29.4bn

Europe's cosmetics exports to non-European countries in 2024
Europe is a major re-exporter, not just a consumer market

6.4% CAGR

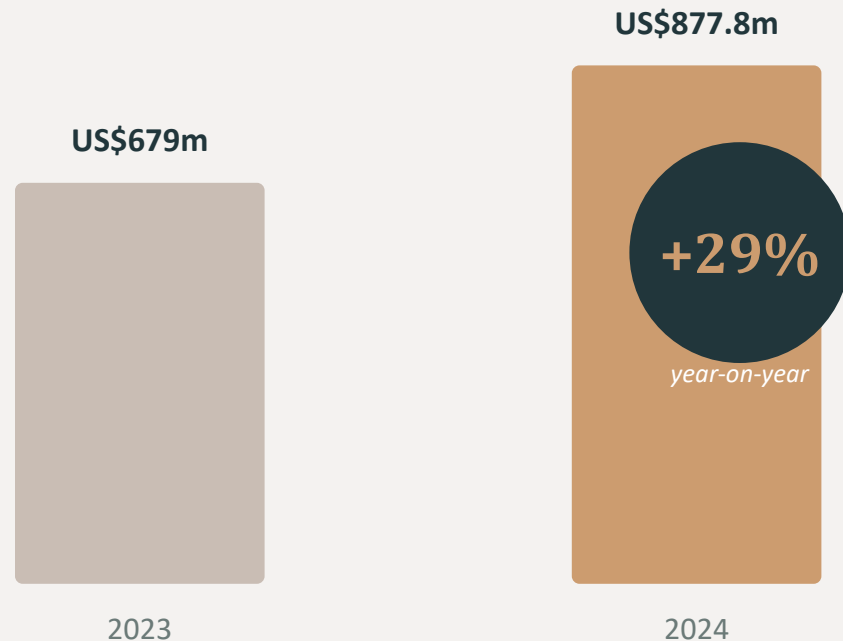
Growth of Europe's natural & organic segment to 2035

Europe figures: CBI (Netherlands Enterprise Agency), "The European market potential for nilotica shea butter," cbi.eu — last updated 7 January 2026. Global figure: Coherent Market Insights.

SOUTH AFRICA'S EXPORTS

Not starting from nothing — real, measurable momentum already behind us

SA exports: essential oils, perfumes, cosmetics & toiletries



Source: UN COMTRADE

Why South Africa is well positioned

- Exports of essential oils, perfumes, cosmetics and toiletries grew 29% year-on-year, reaching US\$877.8m in 2024 (UN COMTRADE)
- Third most biologically diverse country in the world — a genuine, defensible comparative advantage
- Established relationships with European buyers already in place e.g. 30+ years working with Gustav Heess
- CECOSA showcases oil producers alongside finished cosmetics manufacturers at multiple trade shows such as BeautyIstanbul and Cosmoprof — spotlighting both our biodiversity and our own manufacturing capability

NATURAL COSMETICS: THE TRENDS THAT MATTER IN 2026

Verified independently through In-Cosmetics Global and CBI market intelligence

1

Clean label

Clean, safe, natural, sustainable and multifunctional cosmetics
- raising the bar on formulations and ingredient technologies

2

Ancient functionality & storytelling

Ingredients with documented indigenous use - entering new product categories

3

Locally-sourced ingredients

Post-pandemic reshoring: closer suppliers, better traceability, lower shipping emissions

4

Upcycled ingredients

Waste streams into value - pushed by the EU Green Deal and Corporate Sustainability Reporting Directive

5

Biotech & microbiome

Lab-grown actives and “gut-to-glow” inside-out beauty, now an established science platform

6

Certification growth

From 5 cosmetic certification schemes in 2005 to 30+ today - COSMOS, Natrue, Fairtrade, Vegan Society

PRIVATE LABEL & PRODUCT TRENDS

Two under-the-radar signals worth watching

Private label is growing

Retailers are expanding assortments to offer consumers quality at value - an enhanced post-COVID trend. 2024 private-label share by value ranged from 21.7% (Czechia) to 52.0% (Switzerland), with the UK at 44.1%, Germany 39.3%, France 34.4%.

Why it matters for us: identifying private-label manufacturers and the trends/ingredients they need is a distinct, often-overlooked market access route.

Ingredient trends to watch

- Natural alternatives to emulsifiers/preservatives: guar, xanthan and acacia gums
- Marine ingredients: algae and microalgae for anti-ageing, sunscreen and pigment
- CBD, adaptogens (ashwagandha, ginseng), fermentation and probiotics
- Climate is reshaping supply: a global rosemary shortage from drought is opening real opportunities in African-grown essential oils and extracts

WHY TRADE FAIRS MATTER

With that opportunity in view, here's how we went and tested it directly

12,559

unique visitors at Paris 2026 - the largest turnout in the show's history

67%

of attendees were international, versus 33% domestic - a global buyer base

233

record entries in the Innovation Zone - the highest number of new ingredients ever shown

OPTIMISING PARTICIPATION THROUGH MARKET INTELLIGENCE

South Africa was one of the few official country pavilions at Paris 2026. Through market intelligence research undertaken by the dtic and CECOSA, with support from SIPPO and IPD, South African-relevant companies were interviewed directly at the show, giving our producers a window into conversations with the actual buyers, formulators and importers who decide whether South African botanicals and oils make it into global formulations.

WHO ARE WE ACTUALLY SELLING TO?

The European buyer value chain and why each link responds differently



Importers

Source, handle logistics and customs, run QC and lab tests, pre-finance and manage currency risk. Import broadly across food, cosmetics and health, and connect origin to market.

Formulators

Manufacture actives and mixtures for multiple industries. Often import directly; heavy R&D investment; product consistency in volume and quality is non-negotiable.

Brands

Manufacture end-products, B2C-facing. Curated, limited ingredient range. Legally responsible for consumer safety - storytelling and provenance are part of the product itself.

WHAT BUYERS WILL ASK TO SEE

A practical checklist for trade fair conversations

Safety & Compliance

- Safety Data Sheet (SDS)
- REACH registration number, or evidence of exemption
- CITES permit / ABS agreement — only if applicable to your specific species

Product & Quality

- Technical Data Sheet & INCI name
- Certificate of Analysis (COA)
- Allergen statement
- Origin statement & traceability description

Sustainability & Credibility (if you hold it)

- Organic certification (COSMOS/Ecocert)
- FairWild / Fair Trade
- Other

Templates for all of these are freely available from CBI's technical dossier workbook ([cbi.eu](https://www.cbi.eu)) — separated by product type for vegetable oils, essential oils and botanical extracts <https://www.cbi.eu/market-information/natural-ingredients-cosmetics/how-prepare-technical-dossier-cosmetic-ingredient>

A SUSTAINABILITY CAUTION

Claims are easy to make - increasingly hard to get away with unsubstantiated

Both CBI and Cosmetics Design Europe flag the same risk: “empty claims” - natural, clean or sustainable language that isn't backed by evidence. There is still no legal definition or industry consensus on what “upcycled” means for an ingredient or finished product, which makes overclaiming easy and increasingly risky.

For South African producers, this is directly relevant

- Back every sustainability or natural-origin claim with documentation, not just marketing language
- EU rules are closing the gap: the Packaging and Packaging Waste Regulation requires recyclable-by-2030 design, and microplastics used for texture or exfoliation have been restricted under REACH since 2023
- Certification remains one of the clearest ways to substantiate a claim credibly but the claim still has to match the evidence

WHAT THIS MEANS FOR US

Five priorities for producers, 2026–27

1

Know which link you're pitching

Volume and documentation for importers; consistency and R&D credibility for formulators; story and provenance for brands

2

Get EU-compliance ready now

Safety, quality and traceability paperwork - this is what buyers actually check first, before certification

3

Position oils as niche, not bulk

Lead with story, quality and documentation for Kalahari melon, marula, baobab etc.

4

Watch where climate creates openings

Supply disruptions elsewhere - like the rosemary shortage are exactly when a diverse African supply base gets a hearing

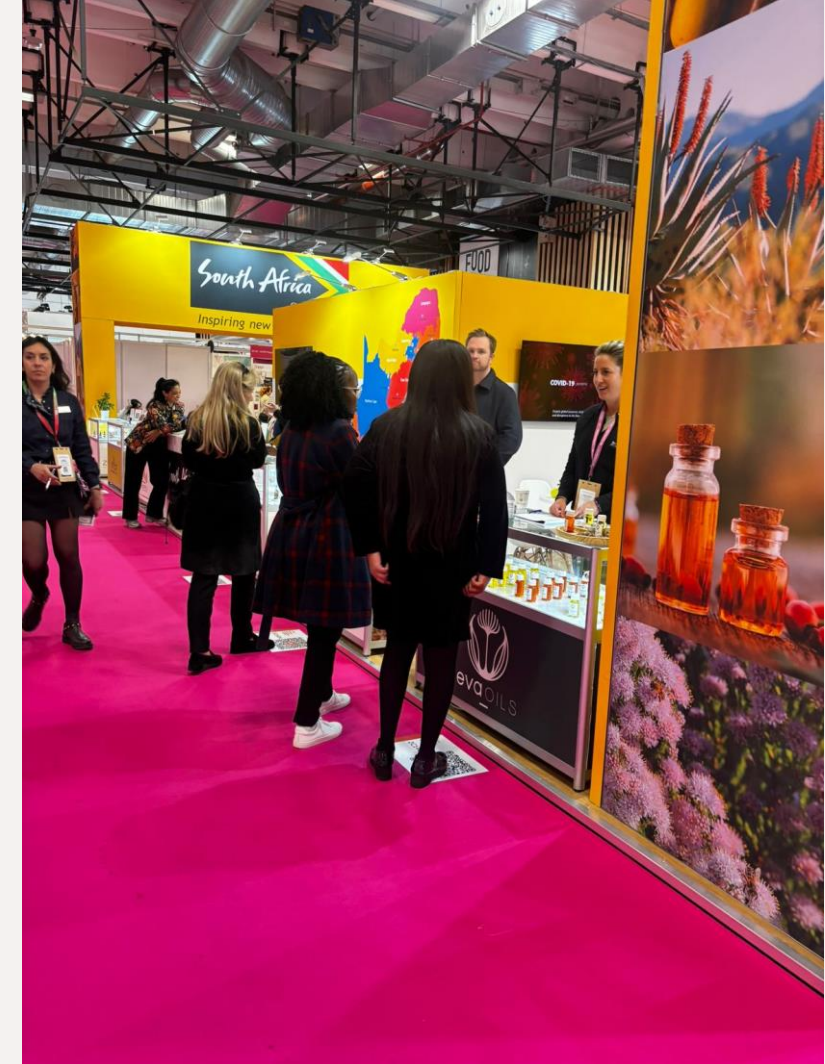
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Lean on the ecosystem already built for this

CECOSA, the dtic, for market intelligence and export support; SAEOPA for the production standards behind it - it's how small producers punch above their weight

IN-COSMETICS GLOBAL 2026

In-Cosmetics Global 2026, Paris - the South Africa pavilion on the ground



IN-COSMETICS GLOBAL 2026

More from the show floor - products, people and partnerships on display





Thank You

*With appreciation to SAEOPA on 25 years of service, and to **the dtic** for financial support, with trade promotion support from SIPPO.*

