

The European market potential for prickly pear seed oil for cosmetics

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Europe is the second-largest cosmetics market in the world, with a growing natural and organic segment. The consumer appreciation for natural cosmetic oils and the established demand for skincare products in Europe offer opportunities for prickly pear seed oil in the European market. Sustainability, ethical sourcing, and traceability are crucial to cosmetics manufacturers in Europe, making it vital for suppliers of prickly pear seed oil to document their supply chain well and demonstrate their commitments to sustainability.

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1. Product description

Prickly pear seed oil is a natural vegetable oil obtained from the seeds of the prickly pear fruit. The prickly pear fruit is obtained from the cactus species *Opuntia ficus-indica*. This cactus is native to Mexico, where it is believed to have originated. However, it has been introduced and now grows in various regions worldwide due to its adaptability to different climates. Prickly pear is cultivated in North and South America, Europe, Africa, Asia, and Australia. Prickly pear seed oil is also known as cactus seed oil or Barbary fig seed oil.

Prickly pear seed oil is generally clear and light yellow in colour, with a mild scent. This means that it works well as a carrier oil. The oil is rich in vitamins E & K, fatty acids, phenols, phytosterols and antioxidants. The exact composition of prickly pear seed oil can vary depending on factors such as the extraction method, geographical location, and the growing conditions of the cactus. The [fatty acid content of prickly pear seed oil](#) ranges from:

- Linoleic Acid (Omega-6): 49-79%
- Oleic Acid (Omega-9): 13-25%
- Palmitic Acid: 9-14%
- Stearic Acid: 2-4%

Prickly pear seed oil is commonly used in cosmetics as a standalone facial oil, or added to moisturizers, serums, face masks, and hair care products. The essential fatty acids prevent moisture loss, while the high vitamin E content has various other benefits for the skin. COSING, the European Commission cosmetic ingredient database, lists [skin conditioning – emollient](#) as the functional properties of prickly pear seed oil.

Cold-pressed prickly pear seed oil is used in cosmetics due to its superior quality. It contains a relatively high percentage of linoleic fatty acid which is an essential fatty acid that the body cannot produce and which has excellent skin barrier properties, similar to Rosehip oil which is very popular in skin care.

Figure 1: Examples of prickly pear seed oil products on the European market



Source: [Compagnie des Sens](#) and [Shaeri](#)

Prickly pear seed oil is 1 of the most expensive oils in the world, as it takes approximately **1 ton of prickly pear fruits to yield just 1 litre of prickly pear seed oil**. Note that a single importer may demand a minimum of 5 tonnes of this oil. This would generate enormous amounts of prickly pear skins. So, if an oil processing company handles the entire process from fruit till oil, prioritising the sustainable handling of the fruit by-product becomes absolutely essential. Costs and sustainability issues could be reduced significantly if the seeds are obtained from juice/jam manufacturers, for which seeds are a by-product.

The table below lists the classification names and codes for prickly pear seed oil. These codes and ingredient names are used as product identifications in the documentation.

Table 1: Classification of prickly pear seed oil

Source	Classification
International Nomenclature Cosmetic Ingredient (INCI) name, according to COSING	OPUNTIA FICUS-INDICA SEED OIL
Chemical Abstract Service (CAS) numbers	90082-21-6
Harmonised system (HS) codes	1515.90 (other fixed vegetable fats and oils and their fractions, refined or not, not chemically modified)

Source: ProFound, 2023

2. What makes Europe an interesting market for prickly pear seed oil?

The European consumer market is, after the United States of America (USA), the largest market for cosmetic products. The market for natural and organic products is established in some markets and growing across Europe, although it represents a small percentage of the total market. Consumers that are more conscious about sustainability in Europe are driving up industrial demand for natural ingredients, including vegetable oils such as prickly pear seed oil.

Europe is the world's second-largest consumer market for cosmetics

Europe is the second-largest cosmetics market in the world, only after the United States. [Retail sales of cosmetic products in Europe reached €88 billion in 2022](#), registering an increase of 7.8% compared to the year before. The [largest national markets for cosmetics in Europe](#) are Germany (€14.3 billion), France (€12.9 billion), Italy (€11.5 billion), the United Kingdom (UK) (€10.5 billion), Spain (€9.3 billion) and Poland (€4.5 billion). Retail sales in the United States amounted to €97 billion in 2022.

In 2022, the largest [segments of the European cosmetics market are skin care \(29%\)](#), followed by toiletries (24%), hair care (18%), fragrances (16%), and decorative (13%). All categories showed positive growth between 2021 and 2022, with fragrances and decorative cosmetics registering the largest growth between 2021 and 2022 with 16% and 14% respectively.

Besides being the second-largest cosmetics market, Europe leads the way in natural and organic cosmetics. In 2020, [the European natural and organic cosmetic market](#) made up 4% of the entire cosmetics market at a value of €3.9 billion, up from €3.64 billion in 2018.

Over the last 5 years the European cosmetics market has [grown at an average of 2.5%](#) including the significant drop in sales during the Covid pandemic. It is expected to continue to grow at this rate and especially in the natural and organic cosmetics segment. The driving forces behind this growth include the rising awareness among consumers about the benefits of natural cosmetics and their increasing availability in mainstream retail channels.

It is worth noting that the size of the cosmetics market and retail sales values are positively related to the quantities of ingredients placed on the market. Consequently, Europe emerges as the most significant market for natural cosmetic ingredients, such as prickly pear seed oil, due to its substantial demand and growth potential.

Strong cosmetics manufacturing industry in Europe demands high volumes of vegetable oils

Europe stands out for the manufacturing of cosmetic products. In 2022, [cosmetics manufacturing alone accounted for about €11 billion in Europe](#). Exports of cosmetic products from Europe totalled €26.4 billion. France and Germany are the main European exporters of cosmetic products with their combined exports exceeding €13.6 billion.

Europe houses a mix of large and small and midsize enterprises (SMEs). SMEs are key to driving innovation and economic growth, as they possess the agility to introduce new ideas to the market. Post-COVID, there has been a surge in the emergence of new SMEs active in the cosmetics industry in Europe. Europe counted an [estimated 8,540 cosmetics SMEs in 2022](#), up from 6,916 in 2021. The UK is home to the highest number of SMEs in 2022, with 1,413 companies, followed by France (1,389), Poland (786) and Italy (776).

Cosmetics manufacturers of all sizes demand vegetable oils, resulting in a high industrial demand. According to data from ITC Trade Map, Europe is the world's largest importer of vegetable oils, followed by Asia and the Americas. The significant European import volumes underscore the market's importance and interest in vegetable oils, including that of prickly pear seed oil.

In 2022, Europe imported a total of 431 thousand tonnes of other fixed vegetable oils, at € 1.3 billion. Between 2018 and 2022, Europe registered an average annual growth of 2.9% with regard to import volume and 12% in value. The largest importers both in terms of volume and value in 2022 were France (17% of total European import market), the Netherlands (13%) and Sweden (12%).

Source: ITC Trade Map, 2023

Tips:

See our [study on the demand for natural cosmetic ingredients in Europe](#) to find more information on relevant markets, sales, imports and potential products in the natural cosmetics segment.

Check online sources such as the [ITC Trade Map](#) or the [EU Access2Markets](#) for more statistics.

3. Which European countries offer most opportunities for prickly pear seed oil for cosmetics?

The largest European cosmetics markets offer opportunities for prickly pear seed oil, in particular France, Germany and Italy. The Netherlands is an interesting market as it is a key importer of vegetable oils and serves as a trade hub in Europe.

France: largest European importer of vegetable oils

France is Europe's leading importer of vegetable oils. According to ITC Trade Map, French imports amounted to almost 74 thousand tonnes at a value of €235 million in 2022. Between 2018 and 2022, import value grew at an average annual rate of 11%, while import volumes increased by 1.4% annually. The steep increase of value is due to the increased prices of raw materials.

Only 18% of French vegetable oils imports were directly sourced from developing market economies in 2022. The main non-European suppliers were Burkina Faso (7.1 thousand tonnes, includes shea butter and sesame oil for [Olvea](#)), Argentina (1.3 thousand tonnes, mostly jojoba oil) and Morocco (616 tonnes, mainly argan oil).

A share of France's import is re-exported again, but an important part also serves France's own strong cosmetics industry. Global companies such as [L'Oréal](#), [Clarins](#) and [Yves Rocher](#) all originate from and have their headquarters in France. The country is also home to many smaller and medium-sized companies that continuously introduce innovations in their product line and formulas. Innovation remains a crucial aspect of the French cosmetics industry. Indeed, the country has its own cosmetics research programme, [Cosmétosciences](#), that focuses on naturalness and eco-friendliness in cosmetic products.

These factors make the French market an interesting proposition for prickly pear seed oil. This is also evidenced by the companies that sell products containing this oil, which are mainly French. A French cosmetic company that currently offers prickly pear seed oil in its portfolio is [Biorgania](#), which imports its organic prickly pear seed oil from Morocco. The cosmetics company [Comptoir des Huiles](#) sources its organic prickly pear seed oil from Madagascar.

Netherlands: key importer and trade hub for vegetable oils

The Netherlands is the second largest importer of vegetable oils in Europe, both in value and volume. The Netherlands had a share of 11% in the total value of European imports and 13% in terms of volume. In 2022, Dutch imports reached a volume of 57 thousand tonnes at a value of €141 million, representing an average annual growth of 3.0% in volume and 8.5% in value since 2018.

The Netherlands is the major European import hub for vegetable oils from non-European countries. In 2022, 52% of Dutch imports came from developing market economies, mainly from Ghana (18 thousand tonnes, mainly shea butter), Burkina Faso (3.9 thousand tonnes, mostly shea butter) and Vietnam (3.1 thousand tonnes, in the main jojoba oil).

This means that the Netherlands is 1 of the main gateways into Europe for exporters of vegetable oils, including prickly pear seed oil. A share of the vegetable oils imported by the Netherlands is processed or refined locally, but a large share is re-exported to refiners and manufacturers in other European countries. Examples of Dutch oil refineries are [ZOR](#) and [Special Refining Company \(SRC\)](#). Partnering up with local refineries may be an interesting proposition, to add extra value to your prickly pear seed oil. [Jan Dekker](#) is an example of a Dutch trader in vegetable oils.

Examples of Dutch cosmetic brands with products featuring prickly pear seed oil are [Pure Oriental](#) and [Caay](#). Both source their organic ingredients from Morocco. [Natural Heroes](#) is another cosmetic brand using prickly pear

seed oil. Their oil is not organic and is sourced from India.

Germany: large established natural and organic cosmetics market

Germany is Europe's largest retail market for cosmetics, [valued at 14.3 billion euros](#) in 2022. Between 2021 and 2022, the market registered a growth rate of 5.4%. It also holds the leading [position for European natural and organic cosmetics](#). In Germany, natural and organic cosmetics have moved from a niche to a mainstream market.

There are several German manufacturers of natural cosmetic products that have products containing prickly pear seed oil. For instance, [Hej Organic](#) developed a [complete beauty line centred around prickly pear seed oil](#), offering products such as face wash, face serum, sunscreen and shampoos.

Although no specific trade data is available for prickly pear seed oil imports, German industrial demand for vegetable oils is relatively high. According to ITC Trade Map, Germany held the tenth position among European importers of vegetable oils in terms of volume and the sixth in terms of value. In 2022, German import volumes reached 17 thousand tonnes at a value of €102 million. Notably, 28% of these imports came from developing market economies. Between 2018 and 2022, total import volumes showed an average annual decline of -4.2%. This drop is associated with the negative impact of the COVID-19 pandemic.

Examples of German importers and distributors of prickly pear are [Ziani Organic Oils](#) and [Cremer Oleo](#). Like this company, many German industry players are known to be highly interested in ingredients certified as organic. [Germany is Europe's largest organic market](#), which makes organic certification an interesting proposition for exporters.

Italy: large natural cosmetic market

[Italy ranked as the third-largest European market for cosmetics](#), with a value of €11.5 billion in 2022. Between 2021 and 2022, the Italian cosmetics market registered a growth of 8.1%. The size of the [natural and organic cosmetics segment in Italy recorded a value of €2.6 billion in 2021](#), an increase of 12.6% compared to 2019. That is about a quarter of the entire Italian cosmetics market. Given the size and growing interest shown by consumers, a growing number of cosmetics companies offer organic products or products that are sustainable for other reasons.

In 2022, Italy was Europe's seventh-largest importer of vegetable oils in terms of volume and the fourth-largest in terms of value. The value of Italian imports of vegetable oils grew significantly at an average annual rate of 19% from 2018 to 2022, amounting to €108 million in 2022. The volume of imports also shows a positive trend at 8.9% during the same period.

With a share of 33% in 2022, Italy imported a relatively large share directly from developing market economies. From 2018 to 2022, the share of imports from non-European countries increased at an average annual rate of 13%. In 2022, the main non-European suppliers of vegetable oils were India (2.5 thousand tonnes), Kenya (2.2 thousand tonnes), Thailand (1.4 thousand tonnes) and Mexico (1.2 thousand tonnes).

[Arganiae](#) is an Italian cosmetic brand that incorporates organic prickly pear oil sourced from Morocco in its product range. The products from the Italian brand [Roviti](#) feature prickly pear seed oil sourced from Italy. Roviti's production is limited because of the scarcity of raw materials and their artisanal manufacturing process. Exporters looking to enter the Italian market face competition from local prickly pear production. It therefore becomes even more important to understand how your products stand out in terms of price, composition, availability and sustainability aspects to effectively target the market. The locally sourced oil from Italy generally has strong environmental claims compared to an oil imported from Morocco, for instance.

Spain: growing imports of vegetable oils

Spain is among the top 5 European importers of vegetable oils in terms of value, with a share of 8.2% of total European imports. The value of vegetable oil imports has grown strongly with an average annual growth rate of 45% between 2018-2022. Import volumes also grew strongly, with imports amounting to 31 thousand tonnes in 2022, registering a year-to-year growth of 37% since 2018.

Spain is also a major market for cosmetics in Europe. In 2022, [Spain was the fifth largest market for cosmetics](#) (€9.3 billion). Between 2021 and 2022, [the Spanish cosmetics market grew at a rate of 23%](#). It is expected that the market will continue to grow. The Spanish company [Nuilea](#), for instance, offers products containing prickly pear seed oil.

Sweden: innovative market

Sweden is the third-largest importer of vegetable oils on the European market. In 2022, import volumes reached 51 thousand tonnes at nearly €113 million. Between 2018 and 2022, import volumes registered an average annual growth rate of 3.7%, while import value went up by 11%. About 88% of vegetable oil imports were sourced from neighbouring country Denmark. Denmark is home to large vegetable oil producers and refineries such as [AAK](#).

The [Swedish cosmetics market is Europe's eighth largest at a value of €2.4 billion in 2022](#), up by 11.3% compared to 2021. The [natural and organic segment is very well-established in Sweden](#), as consumers prioritise simplicity and pureness when it comes to the ingredients in cosmetics products. Sweden is also known for its innovation and focus on and willingness to pay for high-quality products. The combination of these factors provides opportunities for prickly pear oil as a relatively new oil to the market, known for its qualities as a stand-alone facial oil but also for its higher price.

The Swedish market has numerous web shops selling natural and organic cosmetics. Examples include [Jolie](#), [Jordklok](#) and [ECCO Verde](#). Examples of Swedish brands with an offer of prickly pear seed oil include [Opella](#) and [Organic Makers](#).

Tips:

Refer to the [CBI study on finding buyers](#), which provides information about various trade fairs and lists of potential customers in all of the countries discussed above.

Before engaging in an organic certification scheme, verify with your potential buyers whether certification is required and whether it will offer you a competitive advantage over other suppliers to the European market.

4. Which trends offer opportunities or pose threats on the European prickly pear seed oil market for cosmetics?

Prickly pear seed oil is a high-value vegetable oil, used in a range of skincare products for its beneficial skin protection and skin barrier properties. Ethical sourcing and traceability are increasingly important for cosmetic manufacturers to meet consumer demand for sustainable products and comply with stricter European legislation. Suppliers can ensure compliance and competitiveness by adhering to buyers' codes of conduct and by documenting their practices thoroughly. Certification may give you a competitive advantage.

Skincare and anti-ageing products immensely popular in Europe

In Europe, skin care accounts for the largest market share in cosmetic products. In 2022, the skin care segment in Europe was valued at €25.5 billion. Within this segment, anti-ageing cosmetic products stand out. The [interest in anti-ageing products applies to all ages](#) and all genders. Specifically for women, research indicates that 50% of females aged 18-24 also demand anti-wrinkle beauty products. This, in combination with an [increasing ageing population in Europe](#), consolidates the demand for anti-ageing products in Europe. The overall skincare segment in Europe registered a growth of 6.4% between 2021 and 2022.

The growing skincare segment, combined with the [growing market for natural cosmetics](#), provides opportunities for prickly pear seed oil with its high concentration of essential fatty acids that benefit the skin – particularly as [consumers highly appreciate cosmetic oils](#). Although natural cosmetics, including natural oils, are a niche market, European brands offer consumers a growing number of natural virgin oil products. European cosmetic brands offering prickly pear seed oil as a single-ingredient facial oil include [Jolu Naturkosmetik](#) (Germany) and [grüum](#) (UK).

Figure 3: Examples of brands marketing their prickly pear seed oil as anti-ageing (rejuvenating) oil



Source: [Jolu Naturkosmetik](#) and [grüum](#)

Consumption of prickly pear fruit helps boost interest in use in cosmetics

Various natural ingredients find applications in different industries based on their specific properties. For example, vegetable oils such as coconut, avocado and almond oil have long been used in the food industry. However, their value and demand have also surged as sought-after ingredients in cosmetic products. This [trend for food ingredients in cosmetics](#) is nothing new, but it brings several opportunities for prickly pear seed oil.

Prickly pear has a long global history as a food ingredient. The prickly pear fruit is also common in Mediterranean food culture, though it is more exotic to the Northern European market. However, since 2020 there is an [increasing interest in prickly pears at a retail level](#) in the Northern European market too. The cosmetics sector can also benefit from the growing interest and recognition of the product. In general, food-derived ingredients appeal to cosmetics consumers due to their perceived safety and familiarity.

Increased popularity on the food market may support increased recognition and sales in cosmetics. At the same time, however, many exotic oils have proven not to rely on this, such as argan, jojoba and other oils. This means that exotic oils can succeed in the cosmetics market based on their unique cosmetic properties and benefits that set it apart from other cosmetic ingredients in the markets. Prickly pear seed oil has the potential to stand out, as it has very good cosmetic properties, which is its main selling point.

Ethical sourcing and traceability increasingly important on cosmetics market in Europe

[European consumers are increasingly looking for sustainable cosmetic products](#). This typically means they look for cosmetic products that are not harmful to the environment. Consumers are also studying ingredient labels more closely to see which are natural ingredients. To comply with customer demand, cosmetics manufacturers and brands increasingly source ethically and demand higher traceability in their supply chain. This trend is also driven by increasingly strict European legislation. The [European Green Deal](#) (EGD) imposes higher sustainability standards on production and industrial processes.

For European companies it has become crucial to report on their social and environmental impact throughout the chain. This means that European buyers demand transparency from you as a supplier, on cultivation, harvesting and manufacturing processes. One approach employed by buyers to ensure supplier adherence to sustainability standards is the use of certified ingredients. In addition to certification, buyers may also require

compliance with their code of conduct.

For a supplier of prickly pear seed oil, this means you should at least have your supply chain well-documented. In addition, it is recommended to start identifying social and environmental risks in your value chain and production processes. Once these risks have been identified, develop short and long-term strategies and activities to tackle them. This will help you comply with your buyer's sustainability expectations. You can consider demonstrating your commitment and efforts through certification to showcase your compliance with sustainable practices. You can also use self-assessment schemes that serve as a way to communicate the sustainability of your company, such as [UN Global Compact](#) and [Sedex](#). While these initiatives may increase short-term costs, it will lead to greater competitiveness in a sustainable cosmetics market.

It is important that you use the full sustainability potential of your product. It is good to know that [prickly pear is proposed as a means to combat desertification and to regenerate soils](#). The cactus grows in areas few other plants survive. You can use this in your marketing story. Although this could be a good selling point, note that your company would always need to substantiate this. A prickly pear seed oil exporter already promoting this story is [Nopal Nutri](#) from Mexico.

Additionally, by adhering to a certification standard, you can provide assurance to buyers that your products are cultivated and processed responsibly. Examples of companies that have their prickly pear seed oil certified by Fair for Life and as an organic product are [Entreprise Féminine Rurale d'Economie Sociale](#) (Morocco) and [Phileol Madagascar](#). Before engaging in certification schemes, always discuss interest and demand with your (potential) buyer.

Tips:

Have a look at our trends study to learn more about [trends for natural ingredients for cosmetics on the European market](#).

Do further market research on trends for vegetable oils yourself. Check websites such as [Cosmetics Design Europe](#).

Promote the sustainable and ethical aspects of your production process. Buyers will ask you to support your claims with certification or documentation on your sourcing practices and/or your Corporate Social Responsibility (CSR) practices.

Andrew Jones and Lisanne Groothuis of [ProFound – Advisers In Development](#) carried out this study on behalf of CBI.

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