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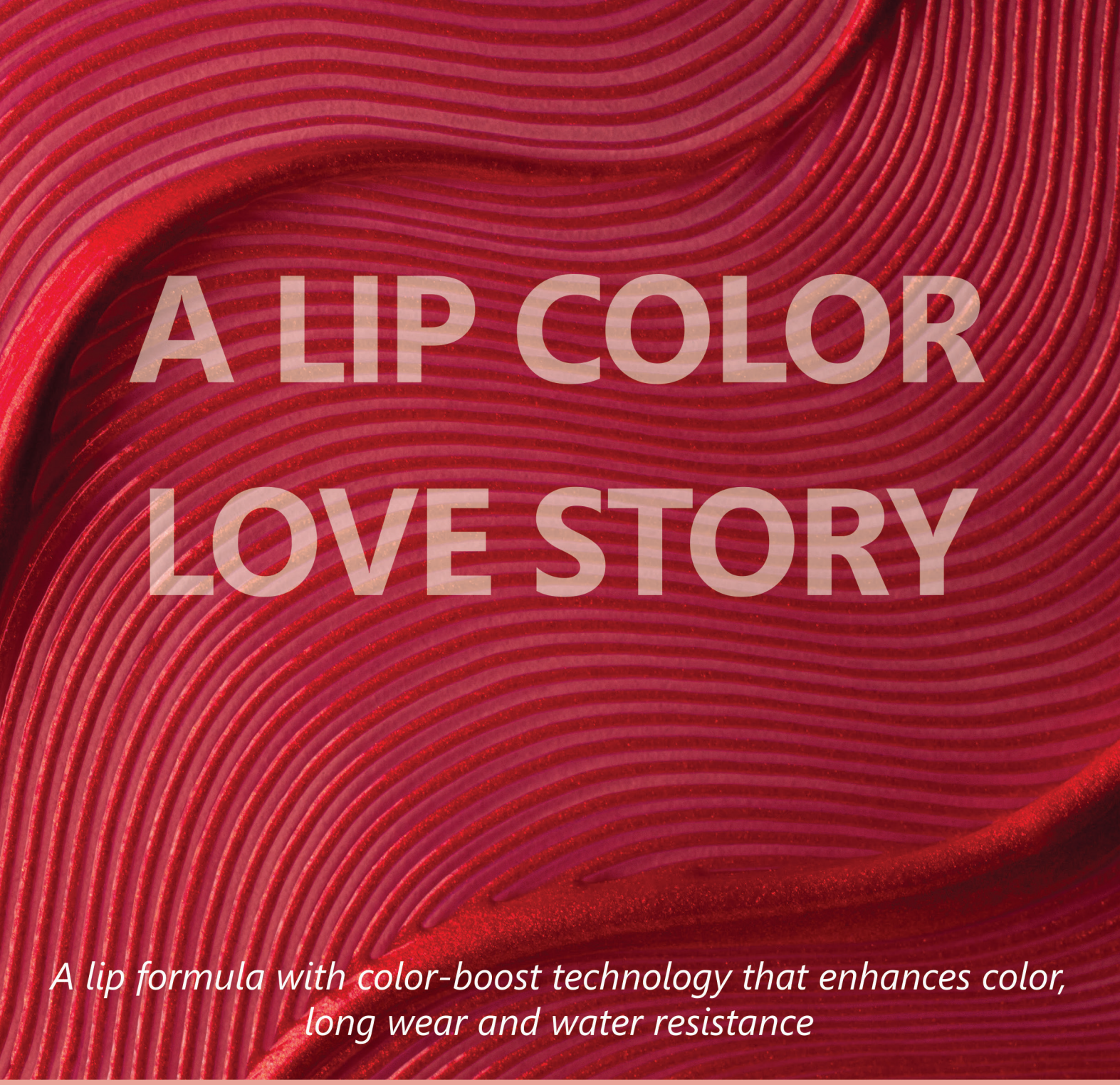
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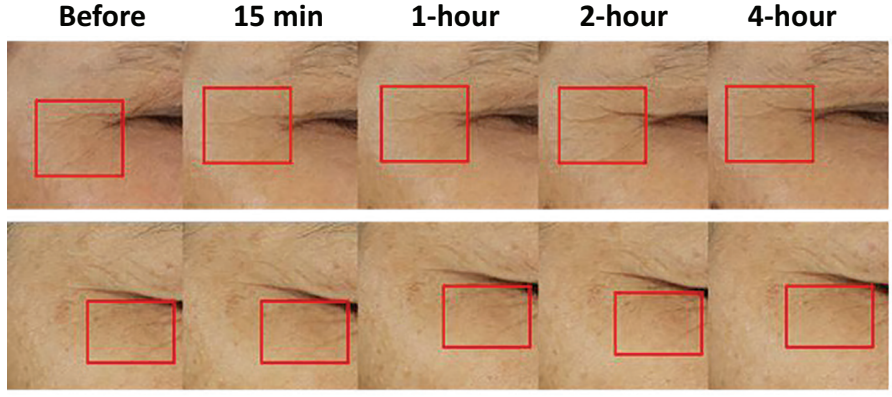
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All other countries may subscribe to the digital edition.
Periodicals Postage paid at Carol Stream, Illinois, and additional mailing offices.

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Global Cosmetic Industry (ISSN 1523-9470) is published eleven times per year as Jan., Feb., March, April, May, June, July/Aug., Sept., Oct., Nov. and Dec. issues by Allured Business Media.
Address: *Global Cosmetic Industry*, 336 Gundersen Drive, Suite D, Carol Stream IL 60188-2403.
www.GCImagazine.com
All correspondence regarding business, editorial, advertising and production should be sent to *Global Cosmetic Industry*, 336 Gundersen Drive, Suite D, Carol Stream, IL 60188-2403. Periodicals postage paid at Carol Stream, IL 60188-2403 and additional mailing offices.

POSTMASTER: Please send address changes to *Global Cosmetic Industry*, PO Box 3009, Northbrook, IL 60065-3009.

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Where Do DTC and Influencer Beauty Brands Fit in 2023?

There was a time when DTC (direct-to-consumer) and influencer brands were the hottest things in beauty. While neither has gone away, they now exist in a very different market reality.

U.S. DTC beauty sales totaled $6.7 billion in 2021, down from $7 billion in 2020, per a new eye-opening analysis from NielsenIQ[a]. The report attributes the decline to everything from a glut of beauty offerings to iOS 14 privacy rules taking effect to increased marketing costs.

That said, there remain growth sectors in DTC, as well as white space opportunities. According to the report, pure-play DTC brands grew in 2021. For the 12 months ending October 30, 2022, the bath and shower sector grew 6.3%, while the cosmetics and nail grooming sector grew 33.2%. Fragrances, which had a banner year in the prestige space, grew 26.6% in the DTC sector. Similarly, hair care, which boomed in the prestige space, grew 91.6% in the DTC sphere; hair removal jumped 19.2%. Meanwhile, DTC feminine care brands have now taken a more than 20% share of the market, while there remains immense white space in eye and ear care, per NielsenIQ.



Styleseat reported that 76% of social media users believe influencer recommendations are fake, yet 57% have purchased a beauty product after seeing it on social media; photo by Ron Lach at Pexels.

How can DTC brands succeed amid unprecedented competition? According to NielsenIQ's analysis, personalized products, diagnostic quizzes, subscriptions/direct shipping options and clean/sustainable offerings can still capture shopper buy-in.

Meanwhile, high-profile influencer brands such as Item Beauty from influencer Addison Rae and Selfless by Hyram from influencer Hyram Yarbro have reportedly lost significant social followings and been pulled from Sephora shelves. At the same time, Forma Brands, whose Morphe brand rode the influencer beauty wave of the last decade, has filed for Chapter 11 Bankruptcy and closed all U.S. stores.

While consumers are increasingly drawn in by expert-backed brands, shoppers still respond to key influencers, including Caroline Hirons, who recently released her retinoid skin care line, Skin Rocks. And high-profile brands such as Briogeo continue to leverage influencer partnerships on product launch campaigns.

Notably, influencer brands continue to garner investments. In early December 2022, Dae Hair raised an $8 million series A funding. Between Q1 2021 and Q1 2022, Dae Hair's EMV (earned media value) growth outperformed its competitive set by 81%, per the brand.

There's also some cognitive dissonance at play when it comes to influencer beauty. In 2022, Styleseat reported that 76% of social media users believe influencer recommendations are fake, yet 57% have purchased a beauty product after seeing it on social media. Therefore, the key question is not whether shoppers can be influenced by influencers but whether that initial interest can be retained over time.

As many brands have learned, the rules of the recent past no longer apply. Learning the new rules will determine brand success in 2023 and beyond. ■

[a]https://nielseniq.com/global/en/insights/analysis/2022/can-the-dtc-beauty-model-survive-2023/
[b]www.styleseat.com/blog/social-media-influencers/



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Featured insiders…

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Brands that bring new skin care technology into their hair care formulations will thrive.

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INSIDER INSIGHTS:
HAIR CARE PACKAGING & INGREDIENTS + ANTI-AGING TRENDS

The hair care and anti-aging spaces continue to cater to the growing consumer demands.

Global Cosmetic Industry spoke with beauty insiders to highlight recent hair care packaging launches, as well as trends in hair care and anti-aging ingredients.

Tactile Packaging

Dan Kroger, VP of sales at Premium Label & Packaging Solutions, says, "Tactile packaging, whether subtle or overt, is a trend that continues to grow in popularity. Adding a textured dimension to a label opens up an array of options to level up the overall design."

Kroger continues, "Label Graphics, which is part of Premium Label & Packaging Solutions, worked with the Beauty Quest Group to launch Rusk's ColorX and Vhab color care system. The sleek modern packaging consists of a pressure-sensitive label printed on a clear Bopp material with a UV black background and silk-screened white lettering. To enhance the look, Label Graphics used a soft touch laminate with a spot clear gloss silkscreen for dimension and to give the mostly matte label a striking contrast."

Moira Stein, insights and strategy at Berlin Packaging, says, "Another trend that continues to gain traction is accessible design. Consumers want to support companies and brands that are socially responsible, and demonstrating a commitment to diversity, inclusivity, and accessibility is becoming increasingly meaningful. Herbal Essences and Victorialand Beauty have included tactile markings to help people with visual impairments find the right product. Other brands are making their products and packaging easier to use for people with physical limitations and the aging population by using ergonomic shapes, one-handed dispensing, and larger font sizes."

Sustainability

Stein says, "Sustainability continues to be a huge packaging trend, especially within personal care and beauty care categories, but it's about more than just material circularity and recyclability. There is growing consumer awareness around greenhouse gas emissions and carbon footprint. Several companies, including Unilever and Cocokind, have started incorporating carbon labeling.



Label Graphics worked with the Beauty Quest Group to launch Rusk's ColorX and Vhab color care system.

EXPANDING SKINIFICATION

| BY DEANNA MULICKA, Acme-Hardesty

There has been an expansion in the skinification of hair trends over the last few months as consumers look to incorporate skin care-inspired products into their hair care routines. As a result, consumers are increasingly focused on scalp health to remove build-up and exfoliate dead skin to build a base for healthy, nourished hair. Brands that find a way to bring new skin care technology into their hair care formulations will thrive in the coming months.

BeautyPol Moist PHA is a complexion of sodium hyaluronate cross polymer and hydroxy-acids for a better surface skin renewal. It contains madelic acid to provide high exfoliating activity for the scalp and lactobionic acid to moisturize, reduce irritation and improve the skin barrier.

Botaniplex Calm 4 contains a synergistic combination of four potent botanical extracts that exhibit multiple activities to prevent skin deterioration. It has anti-inflammatory and antioxidative properties and protects the skin's extracellular matrix against degradation by MMP1 (collagenase). Botaniplex Calm 4 also preserves hyaluronic acid by inhibiting hyaluronidase. ■

BEAUTY FROM WITHIN

| BY DOUGLAS JONES, BioCell Technology, LLC

The top trend that we are seeing in the market is the continued success of dietary supplements that are targeting the "beauty from within" consumer. One of the trends that have come out of the pandemic is consumers are looking for personal care solutions that they can use at home. Since we all are now spending hours each day on Zoom or team calls, facial appearance is top of mind. Consumers are looking for clinically proven ingredients to provide solutions and BioCell Collagen is able to deliver that.

Two retail trends that we see that are interesting are major retailers like Target and CVS are adding dietary supplement sections in their cosmetic aisle with products that target "beauty from within" products. The other is with beauty retailers such as Ulta adding more supplements to their stores. ■

ANTI-AGING: NATURAL INGREDIENTS FOR SENSITIVE SKIN

Philip Shukla, CEO, International Cosmetics Science Centre (ICSC) A/S, Denmark, says, "We foresee a growing trend for formulations with the power of traditional ingredients. After the recent pandemic, we are witnessing a strong interest for natural ingredients with traditional medicinal properties like Ayurveda ingredients. Since the consumers are familiar with or at some points have even used traditional ingredients, they know that these are safe and have enough efficacy and can be a solution for their problems."

He continues, "To combine customers demand for sustainable, natural and safe traditional ingredients with the claim of power of tradition, ICSC has launched Cosmosil CICA Omega-3 Butter (*Centella asiatica* leaf extract, *Linum usitatissimum* seed oil, *Brassica campestris* seed oil, *Butyrospermum parkii* butter) and Cosmosil HB Butter (*Ocimum sanctum* leaf extract and *Butyrospermum parkii* butter). In Ayurveda, *Centella asiatica* (gotu kola) is known for its healing and anti-aging properties whereas Holy basil with its strong antioxidant and inflammatory properties is a very well-known skin protectant. *Centella asiatica* leaves and calendula flowers are sustainability grown in ICSC's certified vertical farm in Denmark."

Vaijnath Lad, manager creative cosmetics technologies, ICSC, adds, "Products suitable for sensitive skin is a growing category and customers are scouting for natural ingredients for sensitive skin formulations. With growing legal cases with side effects of cosmetics products containing synthetic ingredients, consumers are preferring natural and sustainable ingredients for the replacement of synthetic and harsh on skin ingredients. Although, it is a challenging task for manufacturers to identify natural ingredients with better or similar efficacy than synthetic ingredients."

Lad adds, "To cater the increasing demand for natural ingredients for sensitive skin, we at ICSC have launched Cosmosil CAL Butter (*Calendula officinalis* flower extract and *Butyrospermum parkii* butter). Cosmosil CAL is a special extract of the best quality dried flowers of *Calendula* grown sustainably in the ICSC vertical farming facility in Denmark. Traditionally used in Ayurvedic medicine for their calming and soothing benefits, *Calendula* is also known for its anti-inflammatory, and antibacterial properties. Cosmosil CAL Butter can be used in several formulations like after shave balm, post sun care products, make up cleansing balm, diaper creams etc." ■

Q&A: HOW TO ADDRESS FRANCE'S AGEC LAW

| BY GWENAELLE OGOR, general manager of IBG France



Gwenaelle Ogor is the general manager of IBG France.

Q: What does France's AGEC (in English: Anti-Waste for a Circular Economy) law require of brands?

Gwenaelle Ogor (GO): The cosmetics sector is directly affected by the implementation of the anti-waste for a circular economy law, in both formula and the beauty product in its overall state. This law is now integrated into all cosmetic regulations and necessitates four main requirements of brands, first and foremost in France, but also in Europe and beyond.

Only reusable cosmetic packaging is allowed, made entirely from recycled materials with zero single-use plastics.

Use of the word "biodegradable" (or equivalent) will soon be prohibited on cosmetic products and packaging, as it creates confusion among consumers concerning the recyclability of waste and the fight against plastic pollution.

The obligation to use a single, standardized label with regards to sorting and recyclability of a product (the Triman logo, for example).

Regarding formulas, cosmetic brands will initially be required to inform consumers about the possible presence of endocrine disruptors, such as microplastic. This information must be available publicly and free of charge on the internet. As part of a second phase, brands will have to stop selling beauty products containing "any substance in the state of microplastic," from January 1, 2026 onward.

Additionally, linked to the AGEC law is the "3R Decree: reduction, reuse and recycling" of single-use plastic packaging. This decree, which came into effect on April 30, 2021 and applies until December 21, 2025, lays out the following objectives:

Brands must implement a 20% weight reduction target, compared to 2018 standards, for single-use plastic packaging. At least half of this reduction must be achieved through reuse, and can also include unit mass reduction and plastic substitution. The decree has a goal to recycle 100% of plastics by 2025.

Q: Which brands are impacted?

GO: In addition to brands located in France, this law can also affect companies selling products throughout the European Union, including e-commerce sites, and inclusive of brands located in the United States. The "actors" of online sales are also considered "producers" and are obliged to follow the law's standards.

Q: What are the implications for brands and suppliers in terms of packaging material selection, etc.?

GO: As with any sector, considerations for packaging material selection in the cosmetics sector include cost, brand identity, product protection, consumer safety, supply chain ease and sustainability. Notably, changing packaging materials to meet sustainability requirements can have an impact on other parameters, including the formula itself, given quality testing and assurance necessities. Another challenge is that post-consumer recycled packaging is more difficult to produce in clear formats, meaning a brand's overall aesthetic may need to change to comply with packaging sustainability initiatives.

In short, one fact affects other factors, requiring a holistic approach to incorporating sustainability efforts. This makes close collaboration between brands and suppliers even more crucial, so all factors can be considered when deciding upon a suitable, AGEC-acceptable sustainable packaging option. It will mean supplementing the well-known four pillars of sustainability (reduce, recycle, refill, reuse + rethink) with approaches that are unique to both products and brand identities.

Q: What are the implications in terms of formulations?

GO: Apart from the removal of microplastics, depending on the choice of materials and the type of packaging, it may be necessary to retest stability and compatibility. Sometimes, it is even necessary to review galenics due to, for example, a change in a pump or other product delivery feature.

As a result, it is often preferred to reduce plastic to minimize any impact on the formulas.

At IBG, for example, we have introduced a refillable jar in which 63% of raw materials have been removed. In addition to being smart, innovative and fun, IBG won an IF Design Award for this product. ■



Berlin Packaging worked with Oneiro for its Sunchasers Ready to Go kit.

Berlin Packaging conducts lifecycle analyses (LCA) to help our customers quantify their product's environmental impact over the course of its entire lifecycle, including sourcing and raw materials extraction, manufacturing, distribution, and end-of-life. LCA tools allow us to calculate a product's carbon footprint as well as its water and fossil fuel use so we can help our customers select the most effective and impactful sustainable packaging solutions."

Stein continues, "Berlin Packaging is committed to sustainability. We have a dedicated team of experts who combine deep subject matter expertise with practical commercial experience to build circular strategies that will strengthen our customers' brands and grow their bottom line. Our sustainable packaging strategies include lightweighting, recycled content, refill and reuse systems, optimized logistics, and more. We recently supplied packaging for Oneiro's Sunchasers Ready to Go kit. Every package in the bag contains post-consumer recycled plastic, including plastic waste from the ocean. The labels use recyclable ink, and the company's manufacturing labs and warehouses are located close to each other to reduce the brand's carbon footprint." ■





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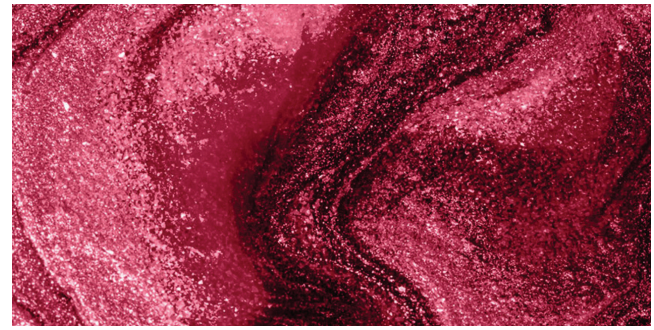


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Not all collagen-promoting ingredients are the same

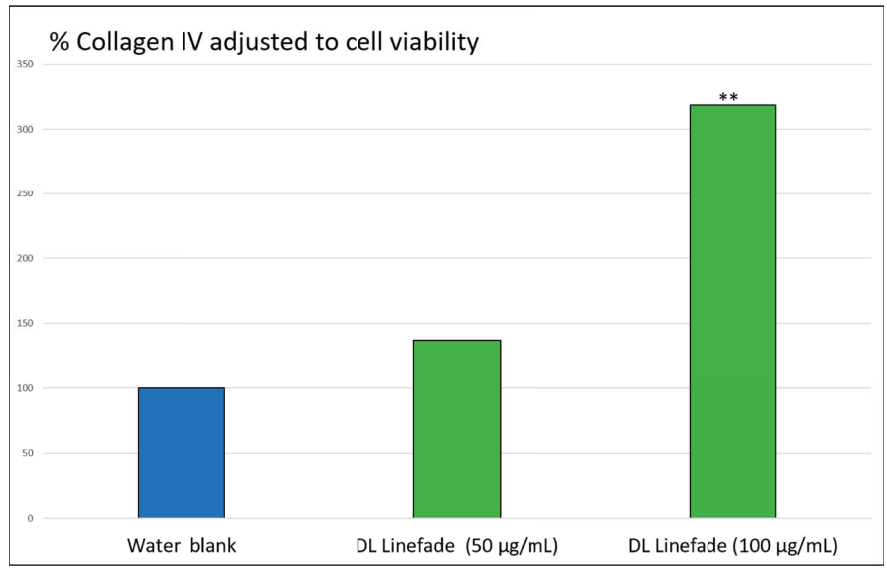
Collagen, an abundant structural protein found in human skin, has been a cornerstone focus in skin care product development for many decades. However, existing cosmetic ingredients known to promote collagens in cell studies mostly target dermal collagens I and III. Both are found in the deeper layer of skin (the dermis). Now, a new approach towards targeting collagen has been discovered—DL Linefade has been found to impart a stimulatory effect on collagen IV. This protein resides closer to the skin's surface, located at the interface of the epidermis and dermis. The structural features of collagen IV include a unique pliable consistency, which is organized in a sheet-like network forming an anchor between the skin layers[1]. With chronological aging, collagen IV progressively depletes, and the dermal-epidermal junction (DEJ) flattens leading to a loss of the skin's youthful structural properties[2]. These changes that occur at the DEJ contribute to the age-related remodeling of the skin, and produce visible signs of aging.

DL Linefade, a novel collagen IV promoter

Olive leaf, rich in a variety of anti-oxidants and bio-active compounds, is known to contain several lipid-soluble molecules which exhibit PPAR-activation. Peroxisome proliferator-activated receptors (PPAR) are known to play an important role in maintaining epidermal homeostasis and regulating the synthesis of lipids and proteins[3].

In early research, we have discovered that DL Linefade prepared from olive leaf activates PPAR-α transcriptional regulation and induces collagen IV synthesis in both cultured cells and human skin explant models[4]. In a human fibroblast cell-culture model, DL Linefade increased collagen IV output by 219% as shown in Figure 1. Further, a human skin explants model (Figure 2) confirmed that collagen IV (stained in green) along the epidermal-dermal junction had increased with the application of just 1% DL Linefade in a triglycerides carrier.

Figure 1. Stimulatory effect of DL Linefade on the synthesis of collagen type IV expressed as percentage of water control. Data are presented as mean values ± SEM, n = 6; **p-value < 0.01 vs. water blank



A 45-Day split-face image analysis study comparing [DL Linefade + Niacinamide] vs. [Niacinamide]

With such compelling in vitro/ex vivo findings, two skin creams were prepared with and without DL Linefade to examine the possible clinical skin care benefits. Niacinamide, a commonly utilized skin conditioning ingredient for photo-aged skin, was added as a positive control into both the experimental (Product A) and control (Product B) creams.

To quantify changes in human skin, a 45-day split face image analysis study was conducted by comparing Products A and B. This single-blinded randomized study was carried out on 20 healthy female volunteers, at the average age of (N=20) 43 years old. The study was conducted to evaluate the efficacy of Products A and B for (1) improving crow's feet roughness and wrinkles, and for (2) reducing facial sagging. The assessment techniques utilized a positioning bench instrument for 3D facial measurement and VisioTOP-300® with AEVA-V3 image analysis software system (EOTECH, France). Image topography analysis intends to study quantitatively the skin roughness with scientifically validated methodologies, largely used in controlled clinical trials. Based on these considerations, crow's feet evaluation implied the following analyses and monitoring of the following parameters:

- **Mean depth of roughness (Rz)** represents the arithmetic average of the different segment roughness calculated from 5 succeeding measurement segments of the same length.

Figure 2. Effects of DL Linefade on collagen IV synthesis in human skin explants vs. untreated and excipient-treated controls after 3 Days of incubation. Collagen IV was detected by immunostaining using specific antibodies. Number of explants per condition = 3. Yellow arrows locate the dermal-epidermal junction.



Figure 3. Intra-group image analysis. Percent change with respect to Day 0 of mean Rz, mean Ra and mean variation of positive volume at different time points (Day 15, Day 30, Day 45) of product usage in a split face application with N=20 subjects. *p values refer to a statistically significant variation value when below 0.05.

Product (A) experimental cream with DL Linefade		Product (B) control cream without DL Linefade	
Days of Product A usage	**Mean percent (%) variation in Rz**	Days of Product B usage	**Mean percent (%) variation in Rz**
T15 ± 2 Days vs. T0	**-4.3%***	T15 ± 2 Days vs. T0	**-0.9%**
T30 ± 2 Days vs. T0	**-5.2%***	T30 ± 2 Days vs. T0	**-0.9%**
T45 ± 2 Days vs. T0	**-3.9%***	T45 ± 2 Days vs. T0	**0.7%**

Days of Product A usage	**Mean percent (%) variation in Ra**	Days of Product B usage	**Mean percent (%) variation in Ra**
T15 ± 2 Days vs. T0	**-3.6%***	T15 ± 2 Days vs. T0	**-2.1%**
T30 ± 2 Days vs. T0	**-5.3%***	T30 ± 2 Days vs. T0	**-3.1%**
T45 ± 2 Days vs. T0	**-5.7%***	T45 ± 2 Days vs. T0	**-0.9%**

Days of Product A usage	**Mean percent (%) variation in positive volume**	Days of Product B usage	**Mean percent (%) variation in positive volume**
T15 ± 2 Days vs. T0	**-3.31%***	T15 ± 2 Days vs. T0	**-1.64%**
T30 ± 2 Days vs. T0	**-3.80%***	T30 ± 2 Days vs. T0	**-1.24%**
T45 ± 2 Days vs. T0	**-6.34%***	T45 ± 2 Days vs. T0	**-1.56%**

This parameter can be associated with changes in wrinkles.

- **Arithmetical mean of roughness (Ra)** is the generally used parameter for the evaluation of skin roughness since it is based on the sampling of all the points characterizing the micro profile of the skin. This parameter can be associated with changes in roughness and fine lines.
- **The variation of positive volume** is simply that which protrudes above from the reference plane. The reference plane baseline was calculated at T0. Topographical analysis was made to evaluate changes in volume around the jaw contour zone. This parameter can be associated with changes in facial sagging.

Figure 4 compares the experimental and control products in a split-face inter-group analysis. Product A demonstrates a significant reduction at Day 15, Day 30, Day 45 time points as compared to Product B in the Rz parameter. *p values refer to a statistically significant variation value when below 0.05.

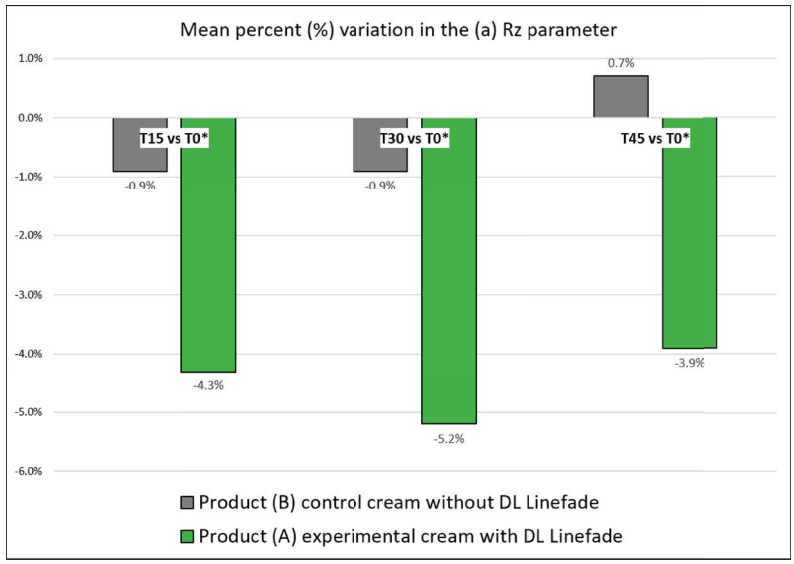


Image analysis results in crow's feet roughness, wrinkles and facial sagging

Intra-group analysis

Usage of Product A (with DL Linefade) induced significant intra-group improvements at Day 15, Day 30, Day 45 vs. Day 0 (baselines) in all parameters: Rz, Ra and positive volume. Usage of Product B (without DL Linefade) did not yield significant intra-group changes at Day 15, Day 30, Day 45 vs. Day 0 (baselines) in all parameters: Rz, Ra and positive volume as shown in Figure 3.

Inter-group analysis

The split-face study findings shown in Figures 4, 5, and 6 are published in the Journal of Cosmetic Dermatology, a peer-reviewed journal which explores imaging techniques in dermatology, cosmetology and plastic surgery[5].

DL Linefade, a new ingredient for anti-aging skin care

Existing collagen-promoting ingredients support dermal collagens I and III, yet effective delivery of these ingredients into the deeper layers of the dermis are not well understood and prone to regulatory challenges. In contrast, DL Linefade targets the collagen-connectivity between skin layers located near the skin's surface. In vitro, ex vivo and in vivo findings demonstrate how this approach translates into significant improvements in skin roughness, wrinkles, and facial sagging. DL Linefade prepared from plant-derived compounds is lipid-soluble, easy to formulate and has been shown to improve the performance of niacinamide containing creams. DL Linefade is ideal for inclusion into functional skin care products offering formulators a new option for creating result-driven skin care.

Figure 5. Product A demonstrates a significant reduction at Day 45 as compared to Product B in the Ra parameter. *p values refer to a statistically significant variation value when below 0.05.

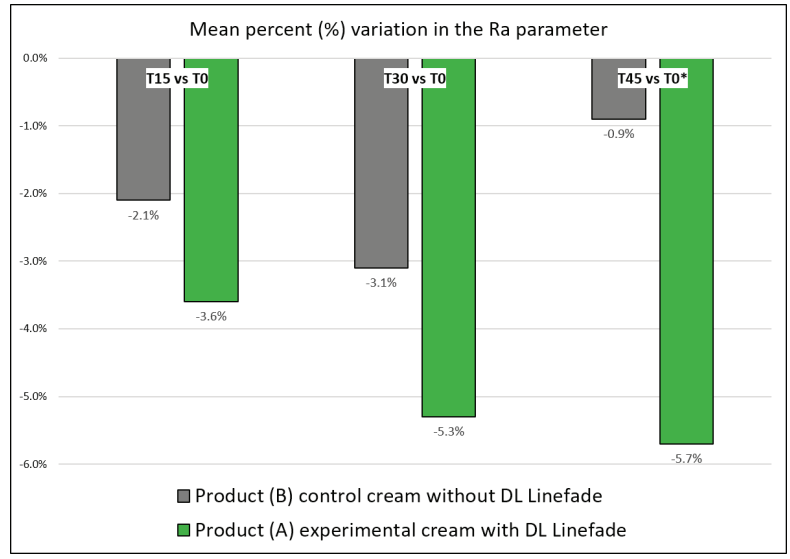
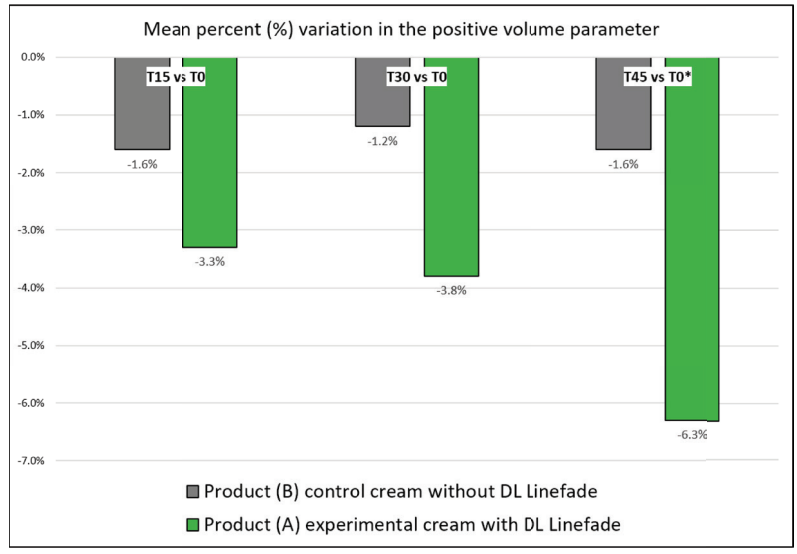


Figure 6. Product A demonstrates a significant reduction at Day 45 as compared to Product B in the positive volume parameter. *p values refer to a statistically significant variation value when below 0.05.



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7 KEYS TO THE HAIR WELLNESS BOOM

From scalp care to exposomal defense to personalized care for textured hair, this red-hot category is set for further innovation.



The intersection of hair health, skinification, sustainability and inclusion are driving significant hair category growth.

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Hair care is one of beauty's all-star categories, powered by a growing array of health- and inclusion-focused innovations.

To illustrate: Q3 2022 prestige hair care sales in the United States totaled $853.8 million for the period, representing 23% year-over-year growth, according to NPD data. Key drivers included products offering restoration and strengthening benefits.

Category sales online and in brick-and-mortar are almost evenly split, per NPD. In addition, the sector has actually reduced the number of units sold on promotion by two points as of Q3.

According to its latest financials, hair care is Ulta's second largest category, driven (no surprise) by hair health, damage repair and targeted treatments. Key performing brands include Ouai and Briogeo in prestige, and masstige brands such as Eva NYC, Batiste and Kristin Ess, as well as professional brands such as Pureology, Redken and Kenra.

With so much healthy growth, investments in the hair wellness sector are on the rise. Recently, Arey, a direct-to-consumer hair care brand targeting gray hair, blew past its $2 million fundraising target, generating a $4.15 million seed round led by the Female Founders Fund and Greycroft. Avey addresses gray hair with a supplement and hair serum, as well as a duo of shampoo and conditioner that helps prevent an increase in graying hair. In total, the system can reportedly preserve and perhaps restore hair pigment.

Around the same time, Dae Hair raised an $8 million series A funding round led by Verity Venture Partners (co-founded by Tina Bou-Saba and Matt Levin), an early growth firm which previously invested in Noto Botanics, with participation from Digital Brand Architects (DBA), Whitney Port, Aimee Song and Christine Andrew, and with continued participation of existing investor Willow Growth Partners. Dae's hair care assortment includes shampoos and conditioners, along with multitasking styling and treatment products.

Bou-Saba notes, "Hair care has been a high growth sector in beauty and a major focus for us as investors. Clean, prestige hair care is growing especially rapidly, driven by consumer interest in ingredients and the 'skinification' of hair. Of course, beauty is a crowded space, and we look for brands with the potential to break through and scale. We think that Dae is incredibly well-positioned to be a major winner!"

Jenny Son, president of Dae, adds, "This past year we have seen a movement of the consumer's interest towards clean hair care–and looking for that clean hair care option within the prestige space specifically. The category continues to grow year over year and we don't see that slowing any time soon. Just like what we have seen with skin care, the consumer has become more savvy and is looking for the best in terms of performance and quality."

Son concludes, "We are seeing a similar trend to skin care now show

[a]www.npd.com/industry-expertise/beauty/



TOP-GROWING HAIR CARE BRANDS

Spate recently detailed[a] the hair care brands that drove the most significant year-over-year growth this year in terms of Google search volume. These are:

1. Jvn (846.3%)
2. Shark hair dryer (556.5%)
3. Arey Grey (386.4%)
4. Lolavie (313.2%)
5. Roseglow (259.4%)
6. Monday Haircare (158.8%)
7. British M (147.8%)
8. Alba Botanica (122.3%)
9. Mise en Scene (119.8%)
10. The Beachwaver (105.9%)

[a] www.spate.nyc/spate-2022-trends-report

up in the hair space, where the consumer is becoming more savvy and looking for the best ingredients and results based on hair type and concern. She wants her hair care products to be both safe and effective and not have to compromise. The consumer is thinking about the scalp like they think about their skin care routines. At Dae, every product has been intentionally crafted with clean ingredients that are safe and effective and all formulations are loaded with nourishing ingredients derived from desert botanicals that have worked for centuries to revive hair to its healthiest and shiniest."

With the hair care boom fully underway, *Global Cosmetic Industry* took some time to break down the key drivers and growth opportunities for brand innovation.

1. Scalp Care

There is simply no bigger hair care trend than scalp care. In its annual forecast, Pinterest revealed that scalp health searches are climbing[b]:

- Scalp massage technique searches are up 55%
- Clean scalp searches are up 55%
- Scalp treatment for dry scalp searches are up 70%
- Natural hair mask for growth searches are up 80%

In December 2022, Spate[c] reported that there are 5.1K monthly searches for "hair slugging," a skinification trend that benefits the scalp and hair. That represents a more than 200% growth year-over-year. The technique involves the application of hair oils or masks, then covering the site with a bonnet or sock before bed to retain moisture.

Meanwhile, innovation in the scalp care space has continued, as with Bloomage Biotech's BioBloom Microecobeauty ME-1/ME-2, a postbiotic for scalp care. Originating from a probiotic fermentation technology, ME-1 is rich in various amino acids, polysaccharides, proteins and other biologically active substances. Bloomage Biotech found that ME-1 can effectively inhibit the growth of harmful bacteria and balance the secretion of oil, thus providing a healthy microenvironment for the scalp.

Meanwhile, ME-2 can significantly increase the secretion of Nrf2, activate antioxidant pathways and reduce scalp oxidative stress, Bloomage Biotech reports, thereby improving premature hair loss, dandruff, dermatitis and other adverse effects caused by oxidative stress.

2. Hair Loss & Density

Spate has reported a spike in online searches for ingredients like minoxidil and tretinoin, revealing consumer interest in effective, doctor-prescribed treatments for hair loss. At the same time, a trendy hair loss technology, clascoterone, is among the highest growth ingredients tracked by the firm. Shoppers are clearly also interested in natural solutions, leading to a spike in searches for pumpkin seed oil to address hair loss.



Briogeo recently expanded its hair health offerings with the launch Destined for Density, a density serum featuring caffeine, biotin and peptides that is clinically shown to increase hair density by up to three times, according to the brand.

Briogeo recently expanded its hair health offerings with the launch Destined for Density, a density serum



"As a founder, Amber [Fillerup Clark] (pictured) is uniquely qualified to lead and build the business, given her strong credibility in the hair category and unique creative vision," says Verity Venture Partners co-founder Tina Bou-Saba.

[b]https://newsroom.pinterest.com/en/post/pinterest-announces-its-pinterest-predicts-2023-report-to-reveal-the-trends-that-pinterest

[c]*For more Spate data, visit* https://hubs.la/Q01snlKM0



From pearlizers to mango blends, hair ingredient technology offers a growing range of benefits; photo by Ivan Dodig at Unsplash.

HAIR CARE INGREDIENT BULLETIN

Pigment-free Pearlizer

BASF's Euperlan NL Pearl (INCI: hydrogenated vegetable oil (and) cocamidopropyl betaine (and) glyceryl oleate) is a wax-based, COSMOS-compliant and pigment-free pearlizer for personal care products. It has quality attributes in hair care applications, as demonstrated in wet and dry combing tests, anti-hair breakage measurements and suppleness tests.

The ingredient is biodegradable and suitable for ethylene oxide-free and sulfate surfactant-free solutions. It is cold processable and can be formulated in shampoos, body washes, shower gels and more, allowing a natural origin content of up to 99%, according to ISO 16128.

Palm-derived Naturals for Hair

Oleon Health and Beauty has launched Radia 7102K (INCI: caprylic/capric triglycerides (70/30)), a palm-based medium-chain triglyceride suitable for all skin types. It is used in skin care, sun protection, color and hair care. Meanwhile, its Radia 7500 (INCI: cetyl palmitate) is used as an adjusting agent for the consistency of creams and hair treatments.

Nourishing Mango Blend

Integrity Ingredients Corp.'s IntegriButter Mango Fruit Blend (INCI: *Mangifera indica* (mango) seed butter (and) *Olea europaea* (olive) fruit butter (and) *Carica papaya* seed oil (and) *Prunus domestica* seed oil) features a combination of oils that contains a surplus of antioxidants, beta carotene, flavonoids, lutein, oleic acid, polyphenols, potassium, and vitamins C and E designed to nourish, fortify and revitalize hair and skin.

Mango is rich in stearic acid, which has similar properties to cocoa butter. The ingredient reportedly demonstrates good lubricity and delivers excellent moisturization to dry skin and hair; helps to restore skin elasticity; protects against UV rays; reduces cellular degeneration; and inhibits the formation of fine lines and wrinkles. ■

featuring caffeine, biotin and peptides that is clinically shown to increase hair density by up to three times, according to the brand. The formulation comprises the brand's Density Boosting Complex, featuring copper peptides, zinc and caffeine.

Destined for Density, which retails at Sephora and the brand's site, is a non-greasy, lightweight formula that absorbs quickly onto the scalp. It reportedly encourages nutrient-rich microcirculation to the scalp. This product is for all hair types, including straight, wavy, curly and coily. It is also safe for color-treated, keratin-treated, chemically treated and relaxed hair.

3. Exposomal Defense

Among the Gen Z beauty trends unearthed in a recent Instagram x WGSN report[d] was the fact that "two out of three Gen Z shoppers plan to buy skin care or beauty products that protect against extreme weather and sun." This opens a new avenue for R&D and marketing innovation for exposomal defense for the skin and the hair.

The skin and hair exposome is the totality of exposures to which an individual is subjected throughout their life, including from the sun, pollution and climate change, as well as chemical and physical manipulation from skin and hair care routines. These factors, combined with the body's response to each, can lead to premature signs of aging.

Lubrizol/LLS Beauty's Xpozuki biotech ingredient is designed to defend against these stressors by preserving the skin barrier, while repairing damage in the skin, scalp and hair (particularly addressing split ends, hair fiber alignment and curl definition to reduce frizz and volume). The technology is sustainably sourced from organic azuki beans, known for their detoxifying and antioxidant

[d]https://about.instagram.com/blog/announcements/instagram-trends-2023

benefits, which are then subjected to biotechnological processes.

4. Moisturization: Hyaluronic Acid for the Hair

In an October 2022 trend report from Spate[e], the firm noted that rising searches for creme lighteners could be attributed to a desire for gentler lifting hair color. Spate advised "consider a deeper focus on moisturizing and conditioning hair care products that counteract the damage incurred by harsh bleaching and chemical processing."

Indeed, innovation in the moisturization space is on the rise to meet this R&D and marketing opportunity. For instance, Bloomage Biotech's Hyanutra-RH Hair Nourishing Shield is a new moisturizing hair conditioner ingredient made from hyaluronic acid (HA) of various molecular weights and brown rice ferment filtrate. Suitable for damaged hair, it uses a water-locking repair system to permeate and distribute active ingredients in the hair. It strengthens chemical bonds and keratin consolidation, making the hair shiny, smooth and strong from the root, according to Bloomage Biotech.

5. Elevating & Destigmatizing Dandruff Care

While dandruff care is nothing new, brands are finding ways to update the category for today's hair health consumer.

For instance, Ouai's new Anti-Dandruff Shampoo—its first containing an FDA approved ingredient, 2% salicylic acid—is formulated to relieve dandruff symptoms and break down dandruff-causing bacteria to soothe the scalp. In addition to salicylic acid, the formulation comprises propanediol caprylate, which has been shown to deactivate *Malassezia* for dandruff control. Users will reportedly experience reduced flaking, itching and irritation.



Among the Gen Z beauty trends unearthed in a recent Instagram x WGSN report was the fact that "two out of three Gen Z shoppers plan to buy skin care or beauty products that protect against extreme weather and sun"; photo by Garon Piceli at Pexels.

The scent and packaging design are tooled to elevate dandruff care above the medicated, functional norms of the category, per the brand. The shampoo's "spa-like" Cape Town scent features notes of ginger, basil and spearmint. The gender-neutral packaging is reportedly 100% recyclable.

In a consumer study of 103 participants over 28 days, 92% of users purportedly reported that their dandruff had improved after using Anti-Dandruff Shampoo.

"Our goal with Anti-Dandruff Shampoo is to break the stigma of dandruff," says Ouai founder Jen Atkin. "One in five people has dandruff, yet it's still very taboo to talk about it. We are here to take the shame, embarrassment and discomfort out of having dandruff. From our formulation and clinicals, packaging, campaign, and especially fragrance, we are here to help you stop being flaky."

The launch originated from consumers sliding into Ouai's DMs, seeking help with dandruff.

"When we launched our Detox Shampoo, we received countless DM messages about whether it could also help stop dandruff, and while it's an incredible cleansing and purifying shampoo, it actually does not treat dandruff," explains Diana Prataziewicz Barnao, Ouai's director of education. "The launch of [the] Anti-Dandruff Shampoo quite literally was inspired by what [went] down in our DMs, and so we developed a specific anti-dandruff formula (made from FDA-approved 2% salicylic acid) that can also bring dandruff to the conversation that people tend to hide away from."

The product design was tooled to stand out in the category, Prataziewicz Barnao shares: "The product smells good, while the gentle formula works to reduce flaking, itching and irritation associated with dandruff that leaves hair feeling clean and soft."

The education director continues, "People come to Ouai to demystify topics that are confusing and we

[e]www.spate.nyc/post/trends-update-no-107

love to take products that aren't luxe, and elevate them to the next level. For example, Ouai took apple cider vinegar, commonly used in clarifying shampoos, and added Ouai's fragrance Melrose Place to Detox to elevate it. Now Ouai is doing the same with [its] Anti-Dandruff Shampoo."

Prataziewicz Barnao continues, "One in five people has dandruff, yet it's still very taboo to talk about it, and a big percentage of that are men. Our goal with [the] Anti-Dandruff Shampoo is to break the stigma of dandruff. This is the first time we're using a man in a product campaign because we understand the concern amongst the male community and want to offer a solution that's different from what's currently available today."

As for why the hair health sector is so hot right now, the educator has some theories: "Consumers have become more conscious about scalp care and how the scalp is key to healthy hair as well. The interest in hair—and the scalp category as a whole—has increased dramatically, with the top two hair concerns being hair thinning/loss and dandruff."

Prataziewicz Barnao concludes, "We've really noticed this demand from our community and wanted to act, giving them solutions. With Anti-Dandruff Shampoo, we've seen incredible clinical results, with 100% of users reporting that their dandruff had improved after using Ouai Anti-Dandruff Shampoo over 28 days, and 92% of users reporting improvement from our consumer perception studies. Earlier this year, we launched Ouai Scalp Serum that nourishes the scalp and prevents shedding, resulting in fuller, thicker hair, addressing the other top concern in hair health right now."

6. Water/Less

In addition to the rising focus on hair health, the sector has doubled down on sustainability, a key point of which is water usage reduction.

Recently, Lubrizol Life Science developed Beauty Beyond H2O, a line of waterless formulations combining ingredients such as AlgaPūr HSHO algae oil (INCI: triolein), Kelco-Care diutan gum (INCI: *Sphingomonas* ferment extract), Sensomer CI-50 polymer (INCI: starch hydroxypropyltrimonium chloride), Oilkemia 5S polymer (INCI: caprylic/capric triglyceride (and) polyurethane-79), Matrifuse S-1 dispersant (INCI: polyhydroxystearic acid (and) neopentyl glycol diethylhexanoate) and Sunhancer Eco SPF (INCI: *Copernicia cerifera* wax (and) *Oryza sativa* wax).

This responds to the United Nation's (U.N.'s) prediction that, by 2025, two-thirds of the world's population will be living in water-stressed conditions. As climate change continues to threaten the natural water cycle, more consumers are seeking out beauty brands that offer waterless products that work.

Beauty Beyond H2O gives consumers a waterless beauty routine with products for cleansing, hair care. The collection offers a range of textures and formats, sulfate- and silicone-free formulations, travel-friendly portable solutions, and sustainable packaging made from recycled or reusable materials.

The Flip-me Algae Bar Shampoo is a solid bar that washes hair while nourishing and conditioning to provide curl definition and frizz control. Shampooing with it is said to allow consumers to use 6.5x less product than traditional shampoo.

The Algae Oil Solid Hair Mask is designed to bring hydration, shine and strength to hair with a light, satin-like feel, while the Instant Nourishing Hair and Scalp Oil Serum is an oil-based formulation that reportedly transforms damaged hair and scalp.

Elsewhere, Unwrapped Life rebranded as NOT!CE Hair Co. to better reflect its commitment to waterless, solid hair care products and reduction of single-use plastic waste. In addition to a new name and bold logo design, the rebrand features a new website that includes a hair quiz to help users determine the right



Ouai's new Anti-Dandruff Shampoo is designed to elevate dandruff care above the medicated, functional norms of the category, per the brand.

shampoo and conditioner bars for users, as well as videos on how to use the products.

While the company has changed its identity and branding, NOT!CE Hair Co. remains committed to selling its solid-form hair care bars—which are activated when mixed with water. The company plans to launch new products this year as part of its rebranding. The products will also continue to be packaged in either 100% recyclable or compostable materials.

In addition, NOT!CE Hair Co. intends to maintain its partnership with Plastic Bank, a social enterprise that seeks to reduce plastic pollution in oceans by building recycling ecosystems in underdeveloped communities. For every product sold, NOT!CE Hair Co. prevents 10 plastic bottles from entering the ocean, rendering the company plastic-negative, per the brand.

7. Personalized Textured Hair Care

The direct-to-consumer personalized hair care market was reportedly valued at $2.21 billion in 2021, and is expected to expand to $10.55 Billion by 2030, per an analysis from Insight Ace Analytic[f]. The North American share of the market stands at 42.2% as of 2021.

While the personalized hair space has expanded amid strong category performance, platforms tooled toward textured hair are on the rise. Most recently, Florae Beauty debuted its personalized, clean, plant-powered and scientist-crafted formulas for textured hair. Florae Beauty's debut product range includes:

- Sana Hydration Booster Treatment Collection
- Sana Growth Booster Treatment Collection
- Sana Strength Booster Treatment Collection

The collections each include a hair oil serum, hair treatment mask and a booster. Customers can take a quiz to determine which products will work best for them.

A percentage of Florae's profits are donated to organizations that support women who are experiencing various hair and scalp conditions, such as cancer, alopecia areata, lupus and burns.

Founder Natalie King, Ph.D., wanted to create a brand that "combined the scientific rigor of her medical work and her personal hair journey as an Afro-Latina woman with textured hair."

Brands addressing the personalized needs of textured haired consumers include Carra, an app dedicated to helping women with textured hair discover their personalized hair care routines with the help of expert advice.

Carra founder Winnie Awa has said, "We match you to the best product and routine to suit your individual drawing from dozens of brands I



A percentage of Florae's profits are donated to organizations that support women who are experiencing various hair and scalp conditions, such as cancer, alopecia areata, lupus and burns.

[f]www.insightaceanalytic.com/request-sample/1216



NOT!CE Hair Co.'s solid-form hair care bars are formulated with concentrated ingredients that are activated when mixed with water.

want to help women reconnect with their hair in a joyful, celebratory way. Let's banish wash day dread once and for all!"

Myavana, meanwhile, offers digital consultations to determine client hair goals; offers a hair analysis kit to assess customers' strands in a lab; offers product, ingredient and regimen recommendations based on the results; and provides ongoing virtual consultations with hair professionals.

A new brand, OurX, is forthcoming in 2023, per the brand's site. The platform will reportedly offer a "comprehensive solution designed to take the guesswork out of your textured hair and scalp care for good—powered by the personalization, innovation and care that you've always deserved." The service will offer relevant content, "tech-powered, personalized regimens," and "science-backed product innovation."

Even Function of Beauty is entering the customized styling category with the launch of its new collection, available exclusively at Target. The collection offers products catered toward straight, wavy, curly and coily hair. Each new styling product offers UV, heat and pollution protection.

The entire collection is made with 90% naturally-derived ingredients and can be enhanced with one of Function of Beauty's 10 Hair Goal Boosters. Products in the collection include:



Each Function of Beauty styling product offers UV, heat and pollution protection.

- Soft Bounce Texturizing Spray: This formulation comprises coconut sugar for soft-to-the touch texture, improved movement and bounce, as well as rice protein for volume and manageability.
- Zero-Gravity Styling Mousse: This flexible-hold formulation comprises aloe juice and apple extract for hydration and panthenol for shine.
- Super Shape Curl Cream: This nourishing formulation with lightweight hold features moringa oil for hydration, sugarcane to reduce frizz, enhance elasticity and ease combing force, and castor seed oil for shine.
- Mane Moisture Styling Gel: This defining gel features carob tree seed oil for hair resistance and elasticity, as well as panthenol for shine, moisture and conditioning.

Looking Ahead

As the convergence of health- and wellness focused innovation continues, hair care brands will increasingly differentiate with elevated, personalized and sustainable offerings. ■

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Ingredient searches related to hair health and growth have dominated search in the last year.

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THE BEAUTY INGREDIENT AGENDA: FEBRUARY 2023

Consumer data and supplier launches align to reveal emerging brand innovation and marketing opportunities.

To better help R&D and marketing teams in their product innovation journeys, *Global Cosmetic Industry* has launched a monthly series breaking down not only the latest ingredients, but also the trends, market data and relevant claims those technologies respond to. From consumer search data to advancements in sustainable chemistry, this regular bulletin will help beauty professionals scope out their next differentiating breakthrough.

Top-trending Beauty Ingredients in Search

Spate[a] recently assessed ingredient search volume alongside the beauty category, unearthing some of the sector's fastest-growing trends (**T-1**). Per 12-month search data ending October 2022, Spate found that rosemary, tretinoin and minoxidil trended amid rising interest in addressing hair loss solutions. At the same time, consumers sought natural hair styling concepts, leading to an uptick in "sea salt" searches.

In skin care, "snail mucin" searches jumped amid a rise in interest in dewy skin, while clascoterone trended in searches related to both acne and hair loss. Finally, Spate found that tepezcohuite trended in searches related to psoriasis and acne.

[a]https://hubs.la/Q01snlKM0

Hair Care's Top-trending Ingredients

Treatment-related hair ingredients have dominated searches, per Spate data (**T-2**). The most queried hair growth ingredients included rosemary oil, pumpkin seed oil and minoxidil.

Meanwhile, consumers searched ketoconazole for the treatment of dandruff and fungal infections. Salicylic acid also spiked in searches related to dandruff and scalp treatments in general. Among shampoo and dry shampoo searches, oat dominated, likely related to its scalp-soothing properties.

All Things Microalgae

According to Trendalytics data[b], consumer searches for microalgae

[b]www.trendalytics.co

(Continued on Page 28)

T-1. Top-growing beauty ingredient searches in the 12 months ending October 2022

Example use of **increase** search data: *Rosemary oil, as searched alongside the beauty category, is experiencing an increase of 33.5K searches on average every month since last year.*

Methodology: Ingredients driving the most significant positive change that have also demonstrated consistent upward growth historically

Trend	Increase↓
rosemary oil	33.5K
sea salt	19.6K
minoxidil	15.1K
snail mucin	13.5K
tretinoin	12.8K

Source: Spate (U.S. Search Data, ending October 2022)

T-2. Top-growing beauty ingredient searches in the 12 months ending November 2022

Example use of **increase** search data: *Rosemary oil, as searched alongside the hair category, is experiencing an increase of 46.0K searches on average every month since last year.*

Methodology: Ingredients in hair driving the most significant positive change that have also demonstrated consistent upward growth historically

Trend	Increase↓
rosemary oil	46.0K
sea salt	19.0K
minoxidil	17.9K
ketoconazole	13.3K
mint	11.7K

Source: Spate (U.S. Search Data, ending November 2022)

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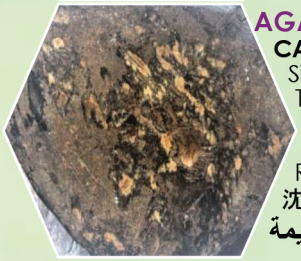
Extensive research in our USA laboratories has provided a breakthrough in skincare technology. We have discovered that the enzymes found in the **Songyi Mushroom** are an effective natural skin-whitening agent. Used regularly, the enzymes penetrate the skin to gives a fairer, clearer complexion, with wrinkle reduction. CLINICALLY PROVEN!

我们在美国的实验室经过广泛研究后，在皮肤护理领域取得重大突破。我们已发现松茸蘑菇内所含的酶是有效的天然皮肤增白剂。经常使用，松茸酶精会渗入皮肤，使肤色更加白净，还能有效减少皱纹。以上效果经过临床证实。



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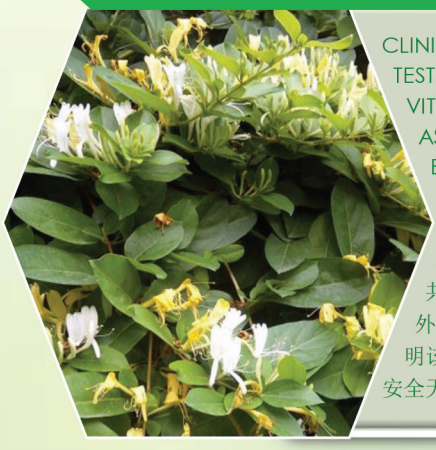
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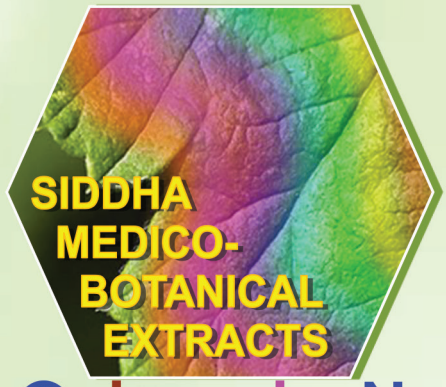
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Lonicera Caprifolium (Honeysuckle) Flower Extract
Lonicera Japonica (Honeysuckle) Flower Extract
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TSCA Listed | FEMA GRAS Listed | DHHS Listed
A Novel plant based preservative (lipo/oil soluble) for cosmetic formulations
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Brown Red 棕红 Brown 棕 Violet (Blue-reddish) 紫
Green 绿 Red Deep 深 红 Ultra Sky Blue 天蓝
White Pearlescent 珍珠白 Red Light 浅红
Dark Ultra Brilliant Yellow 亮黄 Yellow Light 浅黄
Dark Black 黑

LIPO & OIL SOLUBLE LIQUIDS 脂/油溶性液体

Brown 棕 Red 红 Natural Yellow 纯黄 Green 绿
Red Light / Scarlet Red 鲜红 Ultra Sky Blue 天蓝
Dark Black 黑

OIL SOLUBLE POWDER 油溶性粉末

Brown 棕 Yellow 黄 Green 绿 Red 红

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THE RISE IN BIOTECH BEAUTY

| BY JASLEEN KAUR, content Lead and Brand Manager, ChemBiz



Blue/marine ingredient biotechnology draws on molecules and active ingredients found in the ocean with a particular focus on algae and microalgae.

In 2022, the global cosmetics active ingredients market was valued at ~$5 billion; biotechnology held just over 20% market share. The category is, however, the fastest growing, with a CAGR of over 7%, compared to the average 5% growth in the wider active ingredients category. Currently, these biotech ingredients have a higher penetration and a tremendous growth curve in the anti-aging and moisturizing active ingredient categories.

In light of the immense opportunity in the biotech space, there is a major axis shift in the growth strategies of players across the value chain. Brand owners such as L'Oréal and Estée Lauder, among others, have accelerated the product development activities of biotech beauty products, while ingredient manufacturers are heavily investing in the development of innovative biotechnological raw materials, which are cost-effective and environmentally friendly alternatives to ingredients derived from both petrochemical and plant-based sources.

The Power of White, Blue and Green Biotechnology

The term "biotech beauty" refers to ingredients produced using cellular organisms like bacteria, yeast or algae in the course of biocatalysis or biofermentation processes. Based on the type of biomass used, the technology can be divided into three main nodes: white biotechnology, blue biotechnology and green biotechnology, each offering a novel and distinctive way to generate value.

- White biotechnology is the science of using microorganisms (fermentation and bioconversion) or enzymes (biocatalysis) to produce active cosmetic ingredients. Unlike chemical bioconversion, these procedures are natural and employ environmentally friendly solvents. There have been several

innovative product launches in the past year, such as Biobloom Microecobeauty by Biomage Biotech, obtained by fermentation of Lactobacillus rhamnosus bacteria, which helps to balance the skin microbiota. This results in multifunctional benefits like anti-aging, long-term hydration and overall improved skin health.

- Blue/marine ingredient biotechnology draws on molecules and active ingredients found in the ocean with a particular focus on algae and microalgae. This is among the fastest growing and evolving ingredients categories, particularly with the advent of photobioreactors, which have facilitated the industrial-scale cultivation of microalgae. At present, just over 20 species are commercially used. However, this algal biomass represents a largely under-exploited potential because more than 1 million species of microalgae that can be produced within this technology. The marine biomass is not only a highly sustainable resource but also offers powerful anti-aging and hydrating beauty benefits. The manufacturers leading in this technology are primarily based in France, Japan and South Korea.
- Green biotechnology enables the production of plant cell and tissue cultures, offering skin care technologies to the market. Apart from sustainability, this technology is enables manufacturers to adopt a faster and more efficient extraction technologies, capture the most valuable metabolites in a botanical source, and produce extracts with enhanced phytoactive profiles and better performance than conventional botanical extracts.

Beauty Biotech Investments Growing

Although there are numerous brand owners, OEMs/ODMs and brands creating products with biotech ingredients, the actual innovators in the biotech sector are the speciality chemicals and ingredients manufacturers.

For instance, Silab, which has long been a leader in the production and distribution of botanical extracts in France and Europe, has significantly increased its investments in the biotech sector. Silab has quadrupled the production capacity of its microorganism feedstocks like yeasts, microalgae and bacteria, and devoted a new, larger space to its biotechnology research laboratory, which is outfitted with the most recent technological innovations.

Innovative ingredients manufacturers such as this are increasingly focussing on growing the share of biotech ingredients in their overall offerings, responding to today's key security issues, traceability and respect for the environment.

Other key suppliers investing in the biotech sector include Bloomage, C16 Biosciences, Apoena Biotech, Lubrizol Life Science, Vytrus Biotech, DSM and Gelita, to name but a few.

Feasibly backing these huge investments are the big brand owners, including L'Oréal and Unilever, which have vowed to improve their carbon footprint using sustainable practices. Lately, to support their product development teams, these big brand owners are ambitiously collaborating with innovative ingredients manufacturers to get their formulation support and create exclusive biotech cosmetic raw materials from cultured biomass. One such example can be seen in the recent investment by L'Oréal in Microphyt, a start-up in the blue biotechnology space.

Challenges and Barriers to Biotech Beauty

Despite the rapidly increasing demand for biotech beauty products and the reduced production costs associated with them, the initial investment cost in product development and production activities is a significant barrier for many ingredient manufacturers. However, due to rising consumer demand and their propensity to pay a premium for sustainable beauty products, the market for biotech beauty products is anticipated to experience rapid expansion.

Widespread greenwashing practices are another constraint. Although biotech beauty is an environmentally friendly solution, marketers of biotech beauty products face significant consumer skepticism toward "lab-made" or genetically modified products, compared to conventional organic or natural ingredients.

However, the category will ultimately succeed due to growing consumer awareness and the evolution of clean beauty away from naturalness and toward aspects like sustainability and carbon neutrality. Manufacturers would also be helped by a higher safety rating for these products because of the thorough testing they've undergone and their relative lack of contaminants.

The Potential Future

In the last few years, the entry of many new-age biotech startups and the shift in focus of several established ingredient suppliers has exponentially increased the number of available materials. Though still in the early stages of industrialization, these technologies hold great promise for the future. Although the demand is currently primarily concentrated in the United States, Europe and a few East Asian nations like Japan and Korea, developing economies such as India, China and Latin America offer a significant future market for biotech beauty.

Market leaders in the ingredient supplier space, as well as FMCG giants, have already begun experimenting with biotechnology and developing synergistic capabilities that extend to all three of the major biotechnology subfields. Growth strategies likely to be implemented in the future include increased technical and formulation capabilities, smart partnerships and targeted M&A, and large-scale manufacturing capability buildup. ■

(Continued from Page 23)

materials recently increased 14% year-over-year, while social engagement has risen 1%. Top associated benefits include hydration, brightening and anti-aging.

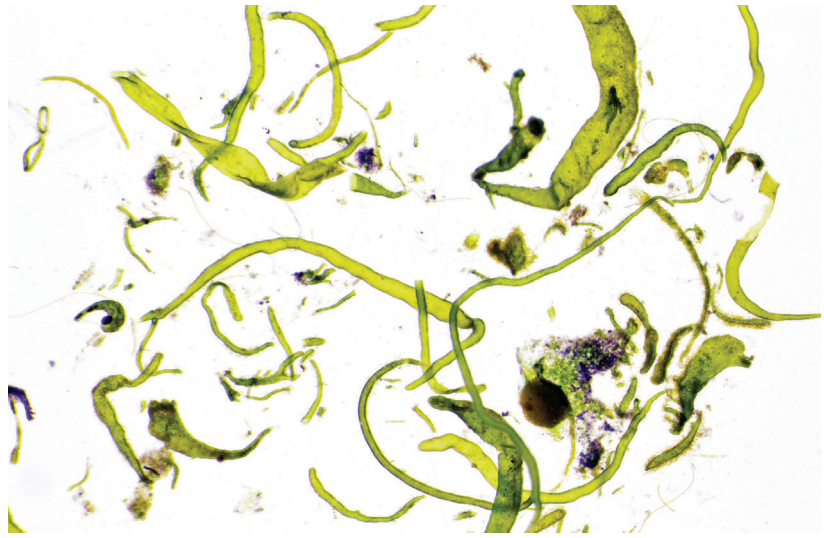
The rise illustrates the rising interest in ocean-derived innovation. Suppliers are stepping up with new ingredient tech in the space. For instance, Silab's Algophagyl (INCI: *Chlorella sorokiniana* extract) helps preserve the skin's equilibrium and corrects the functioning of mitochondria, which can malfunction in reaction to stress. The ingredient was tested on Caucasian and Asian volunteers; results showed the ingredient rendered the skin glowing, with an overall improved quality of skin, per Silab.

Meanwhile, IFF/Lucas Meyer Cosmetics' IBR-SolAge (INCI: *Simmondsia chinensis* (jojoba) seed oil (and) *Dunaliella salina* extract) is an oil-soluble extract of pink microalgae that is sustainably grown in the Mediterranean. The ingredient was developed to mimic the algae's ability to withstand solar irradiation, providing photoprotective mechanisms to create anti-glycation and anti-aging skin care and fight what the company refers to as *glyc-aging*.

In applications, the technology inhibits the formation of advanced glycation end products (AGEs); removes AGEs already formed by degrading glycated proteins; and inhibits the AGE-mediated signalling cascade.

According to the company, when tested on a solar-challenged population, the application of IBR-SolAge reduced the accumulation of AGEs in the skin, improved skin elasticity, reduced skin roughness, and decreased the appearance of wrinkles, red spots and UV spots.

Elsewhere, Symrise's SymControl Scalp, based on a microalgae from the Mediterranean Sea, is designed to protect the hair and scalp from environmental stress and damage from UV radiation, restoring hair shine and rendering it healthier. The ingredient comprises a combination of *Tetraselmis suecica* algae and naturally occurring mannitol.



According to Trendalytics data, consumer searches for microalgae materials recently increased 14% year-over-year.

In applications, the ingredient has been found to offer a clean sensation on the hair and scalp by effectively normalizing sebum production and extending time between washings. SymControl Scalp is 99.4% natural in origin and is COSMOS-approved, halal and kosher-certified. The microalgae is produced using sunlight and carbon dioxide.

Pro-retinol's Gentle Boom

Pro-retinol search volume recently jumped 96% in average weekly searches, per Trendalytics, which notes that the popularity is driven by the technology's gentle efficacy. Related search terms include anti-aging, firming, hydrating, brightening, balancing and wrinkles.

Hey Discount[c] data shows that interest in retinols overall is strong, generating 1.2 billion views on Tik Tok and more than 9 million Google searches.

Key launches featuring the ingredient include Glossier's Universal Pro-Retinol, which comprises 0.5% pro-retinol and is formulated to improve the appearance of fine lines, blemishes, pores, dark spots, and uneven tone and texture, all while nourishing skin. The SKU also includes stevia leaf extract to smooth the look of skin to address fine lines. Elsewhere, Josie Maran's Pro-Retinol Megamoisture Face Cream features pro-retinol, sodium hyaluronate argan oil to impart irritation-free anti-aging effects.



Glossier's Universal Pro-Retinol comprises 0.5% pro-retinol and is formulated to improve the appearance of fine lines, blemishes, pores, dark spots, and uneven tone and texture, all while nourishing skin.

[c]https://heydiscount.co.uk/consumer-research/the-biggest-2022-skincare-and-beauty-trends-most-popular-beauty-trends-of-2022-revealed

Adaptogenic Mushrooms

Tremella mushrooms (*Tremella fuciformis*) are adaptogens, which help the body respond to stress, anxiety, fatigue and more. Their high vitamin D content makes them ideal for skin care applications. According to Trendalytics, weekly search volume for the ingredient spiked 87% year-over-year. Keywords related to tremella mushrooms included terms like hydrating, wrinkles, vegan, immunity, inflammation and firming.

Campo offers *Tremella fuciformis* sporocarp extract, a botanical, multifunctional active comprising phyto-vegetative viable pluripotent stem cells. In topical formulations, it can reportedly spur the skin's regeneration processes.

On the brand side, Herbar has launched an adaptogenic skin care brand that focuses on the "superpowers of adaptogenic mushrooms, herbs and plants to work their magic inwards and outwards." Key ingredients include tremella and reishi mushroom, da zao (jujube), bakuchiol, rosehip, and hemp seed oil. The blend is said to restore radiance, balance, soothe inflammation, enhance elasticity and fortify skin against environmental elements.

A More Stable Vitamin C

Per an NPD Group[d] report, 60% of women in the United States think the inclusion of vitamin C is important when buying skin care products. Unfortunately, the ingredient is notoriously unstable in formulations.

In late 2022, during the SCC 76th annual showcase (SCC76), Shin-Etsu Silicones of America (SESA) highlighted CAL16-60, an anhydrous, stable and sensorial silicone emulsion system with 10% L-ascorbic acid (AA). While vitamin C (ascorbic acid) is well-known for improving skin pigmentation and increasing collagen, it also degrades and oxidizes in the presence of water, oxygen and light, losing much of its efficacy. According to the company, its Formulation CAL16-60 overcomes such vitamin C stability issues.

SESA's CAL16-60 combines KF-6105 (INCI: lauryl polyglyceryl-3 polydimethylsiloxyethyl dimethicone), KSG-710 (INCI: dimethicone (and) dimethicone/polyglycerin-3 crosspolymer) and USG-1010 (INCI: dimethicone (and) vinyl dimethicone/dimethicone crosspolymer) stabilized 10% AA in a non-aqueous emulsion (polyol in oil).

The company found that the silicone gels improved the texture and eliminated the greasy feel of formulas, while emulsifiers such as KF-6105 achieved stability. The final formulation is described as an opaque lotion that has a non-greasy, velvety texture and absorbs quickly with a powdery, non-tacky after-feel.

[d]www.npd.com



Herbar has launched an adaptogenic skin care brand that focuses on the "superpowers of adaptogenic mushrooms, herbs and plants to work their magic inwards and outwards."

Biodesigned Palm Alternative for Anti-aging

C16 Biosciences' Palmless torula oil is a bio-designed technology aimed at combating palm-driven deforestation. The technology is fermented using naturally occurring microorganisms, rendering an oil that is rich in antioxidant carotenoids for anti-aging product claims, as well as sterols that support the skin barrier and reduce the appearance of fine lines and wrinkles. The technology also offers rich moisturization, per C16 Biosciences. ■



C16 Biosciences' Palmless torula oil is a bio-designed technology aimed at combating palm-driven deforestation.

THE ERA OF CLEANICAL ANTI-AGING IS HERE

Eco-friendly methods and modern technology meet in the pro-aging sector as savvy brands and suppliers unite the best of both worlds.

BY LISA DOYLE

In the past, beauty consumers often fell into one of two categories: those who want the most medically backed, science-based personal care, and those who want the most all-natural, organic, responsibly sourced products. Today, both demands can often be served with the same offering.

For instance, Milan-based DF18+, a new luxury range of plant-based skin care designed to bio-hack beauty, features powerful naturals such as Vitalab's skin rejuvenating Vita Nova, derived from *Lotus japonicus* somatic embryo cultures; Green Coffea Vita, which boosts skin cell renewal, reinforces the epidermal barrier, lightens the skin, prevents water loss and accelerates skin repairing properties; and Vitalab's VitaLight, a pore minimizer and skin brightener derived from *Cirsium eriophorum* cell suspension cultures. In addition to offering a skin quiz to ensure optimal product and routine selection, the brand offers cutting-edge ingredients to lift, plump, reduce the appearance of wrinkles, combat hyperpigmentation and much more.

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While anti-aging has been studied extensively, the science and ingredient development in the space has rarely centered people of color. New initiatives are correcting that.

Such marriages of science and nature will continue to escalate, particularly, as Mintel has noted, 53% of U.S. beauty and personal care consumers research beauty ingredients to understand product effectiveness[a].

Tapping Sacred Rituals

Based on a quick search of the retailer's website in January 2023, Sephora currently offers 20 products touting Ayurvedic properties, including selections from brands such as Moon Juice, Tatcha and Ranavat. Indeed, use of the science of Ayurvedic traditions has been growing steadily in personal care in the past few years. The newly launched brand Vedic Tiger takes the science to the next level.

While many modern Ayurvedic formulations have been adapted or diluted for cost savings or commercial purposes, Vedic Tiger's products are made from medicinal herbs from the rich tropical soils of India and strictly adhere to original, 5,000-year-old recipes documented in 47 ancient texts. According to the brand, the Neeli Nourishing Hair Oil is made from the pure essence left over from boiling a combination of antioxidant herbs at a specific temperature, and then infusing the results in virgin coconut oil, resulting in a high-protein blend capable of reducing premature graying and reducing hair loss.

New ingredients also highlight long-beloved rituals.

"Inspired by ancestral Japanese beauty rituals, Sacred Patch is based on a molecular patch technology to harness the power of the valuable algal polysaccharide sacran," says Hannah Cwienkala, marketing manager, sun and skin care, BASF North America. "This precious substance was entrapped into a molecular patch technology, consisting of three natural biopolysaccharides that form a molecular mesh: pullulan, alginate and hyaluronic acid. Sacred Patch soothes sensitive skin and provides moisturization."

[a]www.mintel.com/beauty-trends



Vedic Tiger's products are made from medicinal herbs from the rich tropical soils of India.

Marine-based Technologies Rise to the Surface

Suppliers are tapping sustainable marine-based ingredients to boost anti-aging products' efficacy. Among them is BASF North America's Seanactiv bioactive, which uses the power of algae-derived fucoidans to help decrease the signs of aging around the eyes.

"Seanactiv helps to reduce the appearance of dark circles and crow's feet wrinkles, while simultaneously enhancing the luminosity and vitality of the eye area," says Cwienkala. "The algae from which Seanactiv is extracted is certified organic ... fully traceable and manually harvested in Nova Scotia."

Microphyt's PhycoSi (INCI: water (aqua) (and) *Phaeodactylum tricornutum* extract (and) pentylene glycol) is an upcycled, water-soluble source of marine silicium for anti-aging. Through in vitro testing, Microphyt found that PhycoSi strengthens the epidermis, restores the cutaneous barrier, improves skin exfoliation and smooths the cutaneous microrelief.



DF18+, a new luxury range of plant-based skin care designed to bio-hack beauty, features powerful naturals.

The ingredient was also found to boost exchanges and increase density in the dermis, as well as improve skin firmness, elasticity and tonicity after 14 days, according to the company. Microphyt's R&D team developed a process for extracting the silicium from a manufacturing co-product, recycling a diatom intended for disposal that resulted in the development of PhycoSi.

L'Oréal's venture capital fund, BOLD, recently acquired a minority stake in Microphyt to support the consumer product giant's ambitions in green biotech, particularly from algae-derived materials. The move will help support L'Oréal's 2030 sustainable development goals, which include leveraging 95% biosourced ingredients.

Baillargues, France-based Microphyt, founded in 2007, produces microalgae under low-carbon conditions (leveraging light, salt, nutrients, temperature variation and other inputs) for the purpose of deriving renewable cosmetic technologies. Under the deal, L'Oréal and Microphyt will develop a technological platform and to create cosmetic raw materials from microalgae biomass.

Microphyt has launched three active cosmetic ingredients in the last 18 months; for instance, Microphyt's Luteana was recently found to relieve sensitive skin.

Science-backed Naturals

Utilizing plant-based ingredients in hair care isn't new, but combining them with high-tech, science-backed ingredients bolsters both the strength of formulations and their sustainability factor, with incredible results. In partnership with Novachem, distributor Coast Southwest can offer the latest ingredient innovations exclusively to the U.S. market, notably Oleobiota, a botanical active from the tannin-rich Ñangapirí plant, which serves as a natural astringent.

"Based in Argentina, Novachem combines science and nature, leveraging the resources and biodiversity found in Argentina to develop the latest in natural active ingredients that align with today's trends and consumer desires," says Traci Cassell, vice president, anti-aging, for Coast Southwest. "We can develop interesting skin care formulations that can help to balance sebum production and help to minimize the appearance of pores, which is appealing to a variety of consumer segments."

Elsewhere, Jojoba Desert has collaborated with Lycored to create an active for glowing skin and hair, featuring both JD Jojoba oil and concentrated phytoene, isolated from a non-GMO fungi produced through a controlled fermentation pathway.

The result is JD Phyto-Or 1%, an active that protects and maintains the natural hydro lipid skin barrier, evens skin tone and complexion, and reduces wrinkles and enhances elasticity.

"Applying the benefits of phytoene and JD Jojoba Oil via JD Phyto-Or 1% in daily care routines will create a path for active, natural and sustainable cosmetics that prevent signs of aging and result in glowing appearance," says Lee Reuveni, CEO, Jojoba Desert.

Meanwhile, Bloomage Biotec's Bioyouth-FCM *Cordyceps militaris* ferment filtrate can reportedly promote the expression of HIF-1α while also improving skin aging problems such as collagen loss and pigmentation, and the reduced skin elasticity caused by hypoxia. The technology can also purportedly activate autophagy and help skin repair and regeneration.

Taking a different approach to well-aging, IFF-Lucas Meyer Cosmetics' IBR-Chill (INCI: glycerin (and) water (aqua) (and) *Cistus incanus* flower/leaf/stem extract) biomimics the effects of meditation, which can reportedly improve the appearance of skin affected by stress and anxiety.

IBR-Chill is based on the *Cistus incanus* flower, otherwise known as the hoary rock rose, a hybrid of *Cistus albidus* and *Cistus crispus*. The renewable biomass is organically grown in the Israeli desert using precision irrigation methods.

Hoary rock rose comprises compounds that are said to block the key stress receptor in the skin. The ingredient is standardized in myricitrin, a known anti-anxiety active naturally occurring flavonoid glycoside.

IBR-Chill was applied at a concentration of 1% on psychologically stressed subjects. The ingredient reportedly reduced the appearance of wrinkles, improved skin elasticity and firmness, and reduced skin microcirculation, skin redness and the appearance of red spots, while improving the skin's capacity to mitigate heat and chemical stress-induced inflammation.

Finally, BioCell Collagen, a clinically studied dietary supplement with more than twenty years of safe and effective use, has recently been certified as halal by the Islamic Information Documentation and Certification GmbH (IIDC). According to the company, this certification is accepted in nearly all Islamic countries, including those with the most rigorous standards.

"The halal product category is growing, and more consumers are looking for the IIDC halal symbol as it affirms the product's commitment to safety and health," says Mohammed Ishaq, CEO of BioCell Technology. "It's important to us to reach and serve those who seek halal-certified products, and BioCell Collagen meets those strict standards."

BioCell Collagen has reportedly been shown to address the physiological degradation of connective tissue and the associated age-related loss of structurally essential molecules. More than a decade of research, including seven human clinical trials, has reportedly demonstrated that the ingredient can combat visible signs of aging, such as wrinkles, fine lines and crow's feet, while providing internal support for healthy connective tissues and joints.

The beneficial effects BioCell Collagen are attributed to its composition of naturally occurring hydrolyzed collagen type II peptides and chondroitin sulfate, the company reports.



The product most associated with copper peptide searches is The Ordinary's Buffet + Copper Peptides.

Peptide Power

From products to ingredients, peptides are among beauty's hottest commodities.

Lipotec offers a green chemistry solution via its Argireline Amplified peptide, an evolution of Lipotec's bestselling Argireline peptide.

"We believe that brands do not need to compromise on efficacy while achieving their sustainability targets," says Bianca McCarthy, Ph.D., global marketing manager, Lipotec Active Ingredients. "For 2023, we plan to strengthen our offerings in active ingredients with exceptional sustainability profiles that also demonstrate a targeted molecular approach and enhanced clinical efficacy, validated using the latest digital technologies."

Elsewhere, copper peptides experienced an 81% rise in weekly search volume in 2022, according to Trendalytics[b]. Key related concerns in searches included the terms smoothing, antioxidant, brightening, wrinkles, firming and restoring. The product most associated with copper peptides is The Ordinary's Buffet + Copper Peptides.

Meanwhile, Spate[c] notes that there are about 4.1K U.S. searches for peptide moisturizer ever month, representing 42.5% growth year-over-year. Brands most associated with the product term are Olay, The Inkey List and Derma E.

Key associated benefits related to the search term are hydrating, firming, lift, intense, anti-aging and balancing, while key related searches include SPF collagen, vitamin C, ceramide, argan, hyaluronic acid and retinol.

Per Spate, skin care brands should take note of consumer preferences for these ingredients and consider offering a peptide moisturizer that serves all types of people with different skin care concerns.

Peptides are front-and-center with Keys Soulcare's Truly Becoming Multi-Benefit Peptide Serum, which is said to plump, hydrate and visibly reduces fine lines and wrinkles with a poly-peptide complex and marine bamboo.



Peptides are front-and-center with Keys Soulcare's Truly Becoming Multi-Benefit Peptide Serum, which is said to plump, hydrate and visibly reduces fine lines and wrinkles with a poly-peptide complex and marine bamboo.

The poly-peptide complex reportedly comprises a potent amino acid formulation that helps to visibly firm and improve skin tone. Marine bamboo, meanwhile, helps reduce the appearance of fine lines, per the brand. Finally, the inclusion of a multi-weight hyaluronic acid is said to offer powerful hydration that helps keep skin hydrated for a plump, smooth look.

In clinical testing, 97% of subjects experienced an instant improvement in the appearance of fine lines and wrinkles, while 98% saw an increase in skin hydration immediately, and 100% experienced an improvement in the appearance of fine lines and wrinkles in just seven days.

Harnessing Cycles

From skin cycling to menopausal care, a renewed focus on the body's cycles and its implications for beauty and aging are front-of-mind for today's consumers.

"Skin cycling" videos have 3.5 billion views on TikTok alone. Popularized by dermatologist Whitney Bow, MD, the concept simply extols the virtues of spacing out the use of active-ingredient-laced skin care products over four nights to minimize irritation and clear up breakouts without undercutting results. While the system originated for the face, it can be adopted for the neck and chest as well.

Per Google Trends data, key ingredients associated with the trend include vitamin A, retinol and hyaluronic acid, and product formats such as serums. The Ordinary is the leading brand associated with the concept.

Meanwhile, the body's natural aging cycle is another area of significant innovation.

"Menopausal skin care products emphasize the estrogen/skin connection with research finding estrogen's important role for skin health, elasticity, and youthfulness," notes Melissa Hago, vice president and creative director of beauty and wellness, Fashion Snoops. "Brands develop skin care products targeted towards aging skin, like Avon's Adapt range for perimenopause

[b]https://trendalytics.co/
[c]www.spate.nyc

to help the body resist stressors, or Faace's menopause face cream packed with collagen-boosting and anti-inflammatory ingredients."

Vichy Laboratoires' Neovadiol Meno 5 Serum for Peri & Post Menopause is a skin-replenishing serum powered by proxylane, cassia extract, vitamins B3-C-E, omegas 6-9 and Vichy Volcanic Water.

"The latest addition to our growing line of targeted and efficacious serums, Neovadiol Meno 5 Serum for Peri & Post Menopause illustrates the brand's commitment to developing products that are designed to treat skin concerns at all stages of life," says Charlotte Mejat, international marketing director of Vichy Laboratoires. "With more than 40 years of research on the effects that lifestyle, environmental and hormonal factors have on skin, Vichy's expertise in exposome science provides invaluable insights that are reflected in each and every formula."

Suppliers are also developing ingredients that can help treat the physical symptoms caused by the onset of menopause.



Vichy Laboratoires' Neovadiol Meno 5 Serum for Peri & Post Menopause is a skin-replenishing serum powered by proxylane, cassia extract, vitamins B3-C-E, omegas 6-9 and Vichy Volcanic Water.

"Symrise's legacy Frescolat collection of cooling sensates are perfect options that provide a gentle, cooling sensation in body and face mists for menopausal care," notes Jennifer King, director of marketing, North America, Symrise Cosmetic Ingredients.

Nutraceuticals are also key solutions for this category and continue to grow.

Hago notes, "Brands like Bonafide are pioneering a natural approach to alleviating menopause symptoms with a patented bioavailable formulation that are optimal for menopausal women."

Bonafide's Silvessa line, containing silicon and biotin, includes a daily capsule as well as daily serums for both skin care and hair care, to treat and beautify from the inside out.

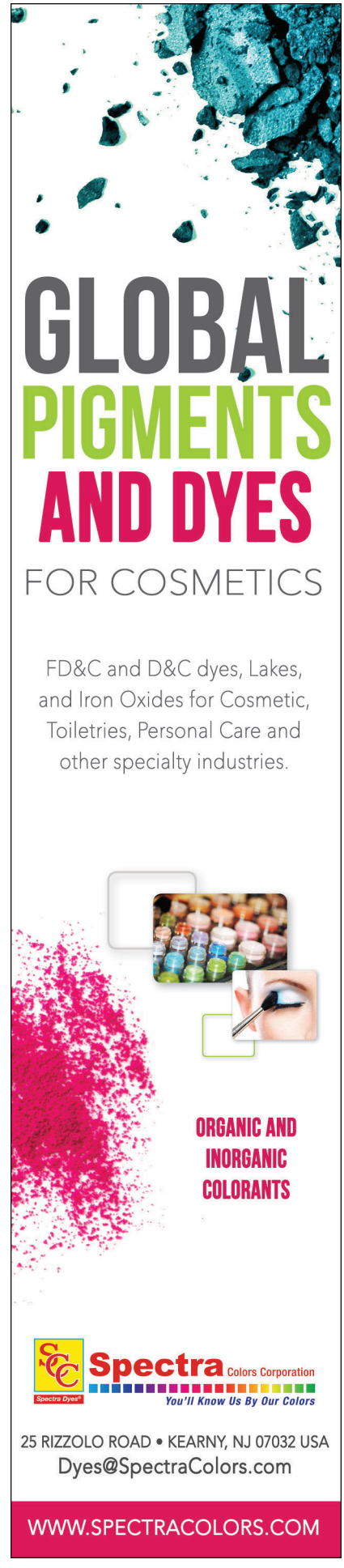
Additionally, Phenology has launched the Beautiful Day AM+ dietary supplement, with biotin, lutein and zeaxanthin to produce healthier hair and skin.

"Building off of this, Phenology is taking its commitment to soothe menopause symptoms a step further, by supporting a study to track hormones and redefine the menopause experience," says Hago.

Personalization: 3D-printed Supplements & Environmental Data

Two recent launches highlight the power of personalization in the anti-aging space. Recently, Nourished partnered with Neutrogena to develop The Ageless Skinstack, personalized 3D-printed skin health dietary supplements that are said to support healthy skin from within. The seven-layer skin health supplements are powered by Neutrogena Skin360's digital skin assessment technology, which IDs the appropriate ingredient mix for each individual consumer.

Every nutrient stack is coated in a sugar-free flavor of the user's choosing and features the following key ingredients: maltitol, erythritol, pectin, potassium citrate, citric acid,



maltodextrin, malic acid, vitamin A, vitamin E, vitamin C, selenium, vitamin D3, zinc, riboflavin, coq10, natural colors, and natural flavors from plants and fruits.

Diagnostics are also boosting personalized experiences. For instance, Haut.AI has tapped BreezoMeter's environmental data to enhance its skin care recommendation engine, allowing users to better understand how their skin responds to the environment and which products are best suited to address those issues.

Haut.AI and BreezoMeter's datasets were combined into analytical models using AI and machine learning to identify patterns of environmental influence on different skin types, depending on the person's location. The analysis yielded three groups of environmental-related skin behaviors, which were integrated into the Haut.AI product matching technology.

"BreezoMeter's cutting-edge AI platform detects and records environmental changes related to particle matter, pollen concentration, UV index and temperature," says Anastasia Georgievskaya, Haut.AI CEO. "All of these factors play a significant role in our skin's health and directly influence inflammation, sun damage, and aging."

She adds, "By accessing these findings, we will unlock greater insights into the relationship between our environment and skin health. Haut.AI's software [uses] individual skin parameters and combinations of facial feature signatures to identify patterns of sun damage, allergy and environmental pollution. We are developing AI-based biomarkers for environmental damage to empower users to pursue interventions to revert or even prevent these changes."

The executive notes that the new capabilities will address key skin care concerns.

"The future of AI-powered skin care is personalized recommendations based on internal factors, like age and stress, and external factors, like the environment," says Georgievskaya.



Recently, Nourished partnered with Neutrogena to develop The Ageless Skinstack, personalized 3D-printed skin health dietary supplements that are said to support healthy skin from within.

"BreezoMeter's unique AI platform analyses environmental changes related to pollution, pollen and sun intensity that impact our skin's inflammation and the aging process. By incorporating their data points into Haut.AI's skin analysis, we will be able to build upon our existing parameters for hyperpigmentation, acne and wrinkles and establish new biomarkers to help treat and prevent environmental damage."

She concludes, "Environmental changes like sun intensity, pollen, temperature and pollution have serious consequences for our skin. BreezoMeter's AI tools monitor these changes to offer more insights into the relationship between the outside world and our skin. Using their data, we will be able to identify and address environment-related skin changes, including inflammation, aging and irritation. We're excited to build upon our suite of biomarkers and use our AI tools to identify interventions for reducing and ultimately preventing environmental damage to our skin."

Equitable Anti-aging

In addition to clean, effective formulations, the era of cleanical beauty demands inclusivity. While anti-aging has been studied extensively, the science and ingredient development in the space has rarely centered people of color. A number of initiatives are seeking to correct this deficit.

For instance, BASF Care Creations' Z-Cote Sheer is a naturally derived zinc oxide UV filter dispersion that delivers transparency and protection for skin types I-V. The low-whitening effect renders the technology applicable for sun and skin care applications, including daily wear products for all skin tones, per the company.

Meanwhile, a different 87% natural BASF technology comprising extracts of papaya, guava and *Saxifraga sarmentosa* and reportedly counteracts age- and acne-related hyperpigmentation in melanated skin by returning skin to the look of its original natural color and overall homogenous tone.

Per BASF, "A clinical in vivo study with these ingredients used a combination of expert evaluations, photographs and self-assessment. The age-related hyperpigmentation study assessed volunteers with Fitzpatrick phototypes between III and IV, while the acne-related study looked at phototypes IV to VI. In both studies, the appearance of spots related to aging and acne were visibly reduced after 28 days."

Finally, BASF's ComfortBD is designed to "enrobe" the skin with full-spectrum CO_2-derived CBD from American-grown organic hemp to mattify and soothe the appearance of red, irritated skin. (ComfortBD contains 0.2% or less of THC.) Per BASF, "After one week, clinical tests with ComfortBD showed significant improvement in the look of redness on the skin versus placebo. After four weeks, the look of shininess and oiliness was also significantly reduced."

"At BASF, we believe inclusive beauty is more than a trend—it's a business imperative," says Nader Mahmoud, vice president, personal care solutions, North America, at BASF. "Consumers want products that celebrate their differences while caring for the planet. Our solutions will bring greater inclusivity to the skin care, hair care and sun protection markets while meeting the market demand for high-performing sustainable products."

Meanwhile, CeraVe has established a fund at Howard University, one of the only historically Black universities with a department of dermatology, to help its faculty further their expertise and build the infrastructure needed to conduct clinical trials with a focus on skin of color.

This new partnership will help Howard University, which serves a predominantly Black patient population, forge the path to advance dermatological science and improve representation of Black people leading clinical trials.

The first stage of the partnership between CeraVe and Howard University will help fund faculty education to obtain certification to conduct clinical trials.

Ginette Okoye, MD, chair of dermatology at Howard University College of Medicine, says, "The creation of the fund in partnership with CeraVe allows us to invest in training our academic faculty to conduct clinical research trials, the first step towards building a dermatology clinical trials unit in the only dermatology department at a historically Black university. The brand's vision and support of the department of dermatology at Howard University improves the retention, and ultimately the academic promotion, of faculty from groups underrepresented in medicine, and by extension provides more opportunities for mentorship of UIM students and residents."

Tom Allison, CeraVe co-founder and senior vice president of global professional marketing, says, "Equity within skin care is more than representation in marketing and advertising. It is representation of all people at the root of product development. To truly achieve therapeutic skin care for all, people of all skin types and tones must be part of skin care research, and this fund at Howard University is one step towards closing the inequity gap." ■



LISA DOYLE was formerly the associate editor of *Global Cosmetic Industry* and is a freelance writer in the Chicago area. Her work has also appeared in *Skin Inc.*, *Salon Today*, *Modern Salon*, *Master Barber* and *Writer's Digest*.



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Global technology firm Nissha Co., Ltd. has again invested in Sulapac, a maker of bio-based materials for packaging and other applications.

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Packaging Innovation Tracker: SUSTAINABILITY BREAKTHROUGHS

From improved recyclability to new bio-sourced materials, suppliers are pushing the envelope on responsible design.

Packaging innovation has continued to advance into 2023, offering unique materials and designs across categories. Here, we round up a few of the latest breakthroughs.

Cushion Compact Made with ABS Alternatives

CJ Biomaterials has developed a cosmetic container made with bio-sourced materials. The first to adopt the technology is CJ Olive Young, which is leveraging polyhydroxyalkanoate (PHA) and polylactic acid (PLA) to create the cushion container for its WAKEMAKE Water Velvet Vegan Cushion, in collaboration with CJ CheilJedang. The materials comprise an alternative to petroleum-based acrylonitrile butadiene styrene (ABS).

South Korea-based CJ CheilJedang is a primary producer of PHA. Blending amorphous PHA in PLA reportedly leads to significant improvements in the mechanical properties of PLA, such as toughness and ductility, resulting in improved impact resistance and the creation of elegant shapes.

CJ Biomaterials' amorphous PHA is purportedly a softer, more rubbery version of PHA that offers different performance characteristics than the crystalline or semi-crystalline forms that currently dominate the PHA market, according to the supplier.

"This is an important milestone for CJ Biomaterials, and we expect that the application of bio-based materials in the consumer goods market will expand beyond the release of the WAKEMAKE cushion," says Seung-Jin Lee, head of the biomaterials business from CJ CheilJedang. "We will widely promote the use of PHA in various markets, as it is an eco-friendly material that is effective for industrial-scale use. We are proud that our PHA products—which are derived from nature and return to nature—are helping to meet the growing demands from brands and consumers for more environmentally friendly products."



CJ Olive Young is leveraging polyhydroxyalkanoate (PHA) and polylactic acid (PLA) to create the cushion container for its Wakemake brand, in collaboration with CJ CheilJedang.

NIR-detectable Black Bottles

Ho.Bag Corporate has introduced a new NIR-detectable black bottle that is fully recyclable. Typically, the carbon black pigments that give a package its dark and opaque color absorb the infrared rays used by the optical sensors installed in plastic waste sorting plants, thereby preventing the bottles from being recycled. This new carbon-black-free bottle avoids this challenge.

Airless with Reduced CO_2 Footprint

APC Packaging has launched an in-stock version of its airless AWP pump that is available for shipping from its U.S. warehouse within 24 hours.

The AWP is reportedly ideal for sensitive formulas such as skin creams,

serums and foundations and can be fully customizable.

Airless technology distributes virtually 100% of the product, allowing the exact same amount to be dispensed with every pump, and ensures formulas enjoy a longer shelf life.

The new packaging has been engineered to be lightweighted to reduce brands' carbon footprint.

The pump is available in 15 ml, 30 ml and 50 ml capacities with either a low or high profile cap, which can be mixed or matched to different sizes.

It also features an ergonomic actuator with depression for finger placement.

Recently, APC Packaging partnered with the National Forest Foundation to plant 10,000 trees in 2023.

Working on behalf of the American public, the National Forest Foundation leads forest conservation efforts and promotes responsible recreation for 193 million acres of the National Forest System.



Ho.Bag Corporate has introduced a new NIR-detectable black bottle that is fully recyclable.

Pulp Compact

Knoll Packaging has launched the 100% Knoll Ecoform molded pulp compact, a sustainable alternative to traditional plastic makeup compacts.

The compact is made from the company's Knoll Ecoform plant-based material, which Knoll Packaging developed five years ago as part of its commitment to eliminate plastic from its supply chain. It consists of bamboo, wood and sugar cane fibers. In addition, the Knoll Ecoform is certified recyclable in the paper recycling stream.

Knoll Packaging spent a year developing the patent-pending design for the 100% Knoll Ecoform molded pulp compact for makeup. To ensure that it can be recycled, the compact features a removable mirror and a closure mechanism that is magnet-free.

The compact doesn't sacrifice aesthetics and functionality for sustainability, according to the company. It has a smooth, luxurious feel and finish and can be embossed and stamped. The company offers an FSC paper mask for added decoration. In addition, the pan configuration is customizable. In addition, the Knoll Ecoform material can be molded, cut to order and color-matched.

Benjamin Cohen, creative and innovation director at Knoll Packaging, said, "The launch of our Knoll Ecoform molded pulp compacts continue our efforts to drive a positive change through product innovation. Our Knoll Ecoform pulp compact took over one year to develop to ensure it has the highest level of quality and design to satisfy the luxury market. The configurations are limitless, and the material can be color matched to align with a brand's DNA. Knoll Ecoform has become one of the most in-demand materials at Knoll, and this latest innovation has the possibility to transform the makeup sector into a more sustainable future."



APC Packaging has launched an in-stock version of its airless AWP pump that is available for shipping from its U.S. warehouse within 24 hours.

New Funding for Bio-based Packaging

Global technology firm Nissha Co., Ltd. has again invested in Sulapac, a maker of bio-based materials for packaging and other applications,



Knoll Packaging has launched its 100% Knoll Ecoform molded pulp compact, a sustainable alternative to traditional plastic makeup compacts.

to advance sustainable alternatives to plastic for its decorative molded products.

Nissha expects the partnership with Sulapac to help expand its Ecosense product line. As global interest in sustainability grows, Nissha's industrial materials business has started to develop ecosense molding, molded products made from sustainable materials like Sulapac's biocomposite and pulp instead of plastic resin.

Nissha initially collaborated with Sulapac in 2018, creating sustainable jars for cosmetics, supplements, spices and dry foods as an alternative to conventional plastic.

Sulapac's bio-based materials are made of plant-based binders, responsibly sourced wood and feedstock from industrial and agricultural side streams, and naturally occurring clay minerals. They biodegrade into CO_2, water and biomass without leaving toxins or permanent microplastics behind.

Alex Takashiba, director of business strategy planning for the industrial materials business unit at Nissha, said, "Sulapac's design principle is to mimic nature. Their materials don't release permanent microplastics, and their carbon footprint is lower compared to traditional plastics made of virgin, oil-based raw materials. Importantly, the beautiful visible wooden chips and the ceramic feel make products made of Sulapac stand out. Its aesthetics is a competitive differentiator. This strengthened partnership supports our sustainability goals and business growth."

Suvi Haimi, CEO and co-founder of Sulapac, said, "The deepened collaboration with Nissha is essential for the future of our company and our mission to save the world from plastic waste. We have high respect for their ambition to significantly replace conventional plastic with truly sustainable alternatives and the investment they have made in the transition towards a circular economy. They are an industry leader and a game-changer that has a real impact on the world." ■





Generation Z consumers are less likely to purchase the same brands as their parents, as their perceptions of beauty are becoming increasingly centered around personal expression, identity and individualism than previous generations.

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5 KEYS TO THE FUTURE OF ORAL CARE

Oral health, clean beauty and sustainability are reinvigorating the category.

BY JANAKI PADMANABHAN, senior research manager, Euromonitor International

The COVID-19 pandemic has transformed the nature of oral care. This essential category is now perceived as an extension of overall health and beauty. Post-pandemic, the emphasis on oral care has only increased, with consumers paying greater attention to their dental health. This renewed consumer interest in oral care products will provide many opportunities for players to explore.

1. Health and hygiene embraced by aging population

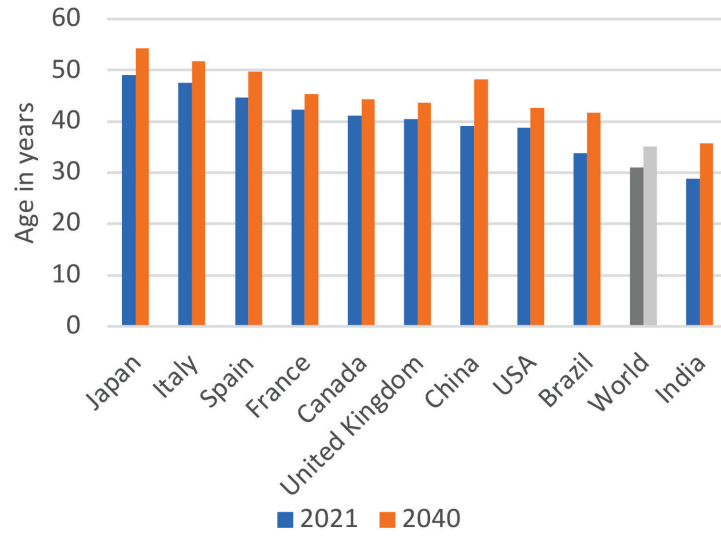
On average, global consumers are living for longer, while birth rates are declining. In Euromonitor International's Voice of the Industry: Consumer Lifestyles Survey 2021, 59% of business leaders surveyed identified demographic shifts as one of the most influential trends impacting business (**T-1**).

For oral care, innovation in gum health, followed by messaging of the value and the benefits of improved oral health to an aging population, is an opportunity.

Japan is the only market in which toothpaste positioned for gum health is a prominent type sold to consumers, even in younger markets such as India or where consumers are slowly entering the 30-plus age group. This provides opportunities for promotion of oral care products that cater for age-related issues, especially gum and enamel health.

Additionally, electric toothbrushes can also be positioned as offering a more thorough clean for aging consumers, especially in Western Europe where consumers can afford the higher price points of this format.

T-1. Mean age in top oral care markets, 2021-2040



Source: Euromonitor International from national statistics/UN
Note: Data for 2040 are forecast

2. Oral care turns to beauty and lifestyle for younger consumers

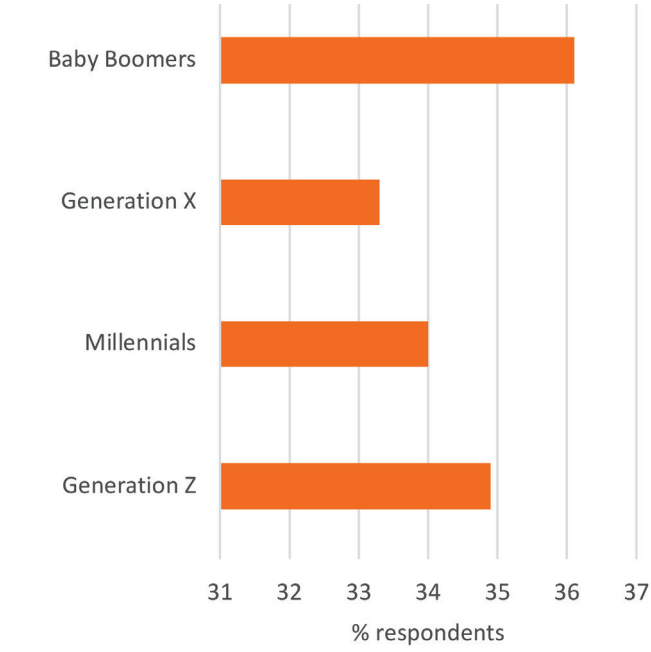
According to Euromonitor International's Beauty Survey 2022, apart from baby boomers, Generation Z is the second-greatest cohort that places greater importance on oral health while defining their perception of beauty (**T-2**). Specifically in oral care, where the industry is dominated by multinational companies with legacy brands, this can be challenging. Generation Z consumers are less likely to purchase the same brands as their parents, as their perceptions of beauty are becoming increasingly centered around personal expression, identity and individualism than previous generations.

The industry witnessed the launch of Co. by Colgate in early 2021. This new brand, by the oral care giant, took a beauty approach to oral health in the United States and targeted Generation Z consumers.

In early 2022, Haleon Inc. launched Sensodyne Nourish to also appeal to younger generations, in this case, millennials.

In China, electric toothbrush brand uSmile has gained share from market leader Philips to become the second largest brand in this space by creating a sleeker design, replacing traditional chargers with a USB charger, in addition to creating collaborations with retailer Beast, which focuses on promoting artistic lifestyle brands.

T-2. Good oral health/care as a perception of beauty by generation, 2022



Source: Euromonitor International Voice of the Consumer: Beauty Survey, fielded June-July 2022

Many new and independent brands are also entering this space with more of a beauty proposition to oral care.

3. Clean beauty trends could compromise dental health

While new brands invigorate the competitive landscape, the clean beauty trend that is evident in skin care is also becoming popular within oral care.

According to Euromonitor International's Product Claims and Positioning 2021, "no fluoride" is becoming an increasingly sought-after claim in key markets such as the United States, China, Germany and the United Kingdom. While consumers demand natural products to replace fluoride in their toothpaste, most dental professionals will argue that fluoride prevents cavities. Hence, the only reason these toothpastes are present is due to a response to "misguided" consumer demand.

Just like clean beauty in skin care, which led to certain ingredients being regarded by consumers as harmful but necessary by manufacturers (ex: preservatives that prevent microbial contamination), it is likely that fluoride could suffer the same fate.

Hence, it is necessary for oral care players to educate consumers on the



Co. by Colgate took a beauty approach to oral health in the United States and targeted Generation Z consumers.

importance of fluoride to dental health before shoppers completely cut fluoride from their oral care regimes, only to later realize that it was a mistake.

4. Conscious consumers demand sustainable products

Increasingly, consumers are reporting concerns around several metrics related to climate change, carbon footprint and recycling (**T-3**). The global consumer is becoming more educated in understanding sustainable products and options, and also demanding products that are environmentally friendly. For many, this is a value they look for prior to buying into a brand.

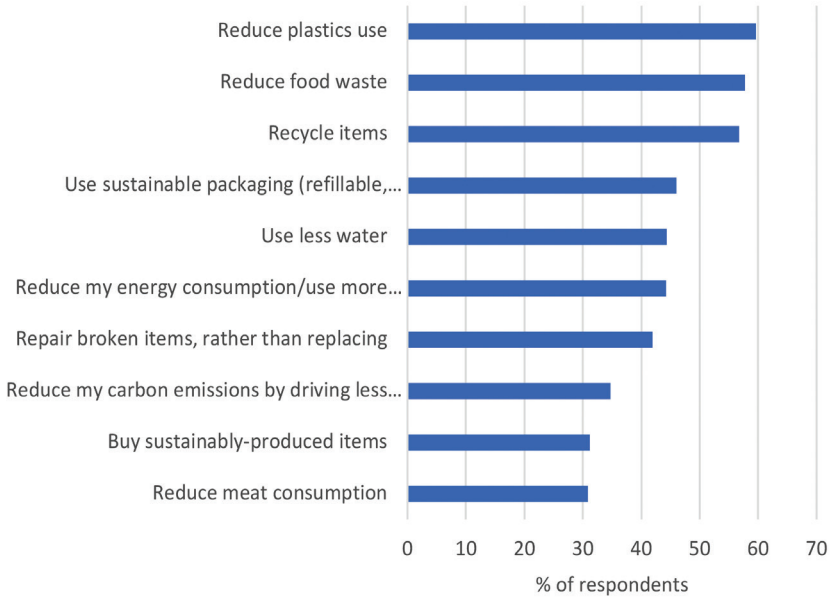
Given the nature of oral care, players can invest in helping consumers who want to lead a sustainable life by reducing plastic use, helping recycle items and using sustainable packaging. With more than 13.6 billion units of toothpaste consumed in 2022, players are focusing on the innovation of toothpaste tubes as part of their sustainability initiatives.

In January 2022, Colgate-Palmolive was successful in creating a recyclable toothpaste tube from a single HDPE material (with different grades). Unilever Plc and Haleon Plc have also made some progress in this space.

Additionally, new entrant brands, such as Waken in the United Kingdom, are focusing on providing toothpaste in 100% aluminum (recycled and recyclable) tubes and mouthwash in bottles made from 100% recycled plastic.

Furthermore, sustainable innovation in toothbrushes has evolved from bamboo options to replaceable heads for manual toothbrushes, and electric toothbrushes made from recycled materials. The launch of Oral-B Clic in 2019 was followed by the launch of Colgate Keep (in the United States) and Link (in the United Kingdom). While these efforts appeal to conscious consumers, it is worth noting that the price point of a bamboo toothbrush and manual toothbrush with replaceable heads help push up value growth in mature markets.

T-3. "Which of the following activities, if any, do you typically do to positively impact the environment or lead a more sustainable life?"



Source: Euromonitor International Lifestyle Survey, 2022, n= 26321



Lush Toothpaste Tabs create a paste when crushed between teeth that can then be used to cleanse the mouth with a wet toothbrush.

5. Oral care could accelerate waterless innovation

Water scarcity is a key environmental concern, and the beauty and personal care industry is often listed among the top contributors to water use, water pollution and wastewater.

In 2021, the industry consumed 10.5 million tons of water globally. Considering the importance of environmental issues, it is unsurprising that businesses are expanding their investment in sustainable initiatives.

Water conservation still features in the top 10 areas of investments (**T-4**); in fact, 59% of professionals in the beauty and personal care industry report that their companies plan to invest in water-related initiatives between 2022 and 2027.

Oral care players can particularly learn from other waterless innovation in the personal care space such as shampoo bars and bar soap. It is unsurprising that toothpaste tablets that have been available for more than a decade have now started gaining prominence.

Toothpaste tablets or tooth tabs are waterless alternatives to toothpaste, although the composition between the two differ. Many tooth tabs are

known for being made with natural ingredients and to some extent, support the no-fluoride movement. Nevertheless, many existing and new tooth tab options have also started to include fluoride alternatives.

There are many smaller brands in this space, including Hello Products LLC, Lush Retail Ltd., Denttabs (Germany), Change Toothpaste (Canada) and The Humble Co. (Sweden). While they are convenient and perceived as more environmentally friendly than a tube of toothpaste, there is limited research surrounding this format, which makes it difficult to identify whether tabs are as effective as traditional toothpaste.

Given the importance of the sustainability and environmentally friendly nature of tooth tabs, this is an area that cannot be overlooked and will benefit from leading players taking a greater interest in innovation in this space.

Future outlook

Over the forecast period, the bulk of growth will stem from Asia Pacific and the Middle East and Africa through products offering specific value and deeper penetration of categories, while in North America and Western Europe, growth will come from toothpaste offering higher specific value and power toothbrushes.

T-4. Sustainable investments (2022-2027)



Source: Euromonitor International Voice of the Industry: Sustainability, fielded January 2022. (n=104)

In key markets in Asia, such as Malaysia, Indonesia and Thailand, extended claims and premiumization, in addition to growing oral health awareness through government policies, will boost demand. ■











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Kindia Beauty has launched with two face masks: Aura Drip and Aura Bounce. Both masks are biodegradable and dissolve in hot water. The Aura Drip face mask is designed to hydrate, reset and illuminate the user's face. The Aura Bounce face mask is designed to heal and rejuvenate the face.



Dr.Jart+ has debuted its revamped ceramidin collection, which features two new products: The Ceramidin Cream-Infused Mask and The Ceramidin Ectoin Cream. The collection is formulated with ingredients such as panthenol and enhanced by Dr.Jart+'s proprietary Ceramidin Complex featuring five types of ceramides to further strengthen the skin's barrier. The cream is an ultra-rich moisture cream with ectoin and five ceramides to nourish, strengthen and proactively protect the skin barrier and resolve the symptoms of severe dryness. The mask hugs the skin to deliver nourishing cream treatment with ceramide NP to instantly bring dull, tight skin back to life, delivering all-day moisture and 24 hours of skin barrier care.



Michal Morrison Inc. is a stem cell science skin care company that has launched its first hero product: Genesis βSTEM6 Molecular Serum, featuring the company's proprietary βSTEM6 molecule. The product is the result of significant research in regenerative medicine and recent advances in stem cell science. The βSTEM6 molecule, a patent-pending "metamolecule," will be available in Michal Morrison products and is said to "restore the self-rejuvenating power of skin that has diminished over time by utilizing an individual's biological inherent potential to extend cell longevity."



Slate Brands, an incubator behind in-house and Gen Z influencer beauty and wellness brands, has launched in-house men's skin care brand Insanely Clean. Korea-manufactured Insanely Clean is streetwear-inspired and science-backed. The brand's initial launches include the Day 'N' Nite Face Wash and Instant Moisturizing Mist.



DF18+ is a new luxury range of plant-based beauty featuring a namesake blend of 18 plant-derived actives to bio-hack beauty. The Milan-based brand also features a skin quiz on its home page, allowing customers to identify their key skin care needs.



JB Skrub is a new direct-to-consumer line of pH-balanced skin, body and hair care products designed for tween boys from former Conde Nast executive (and parent) Jill Biren and actress, producer and director (and parent) Julie Bowen. The JB Skrub range eschews hyper-masculine packaging in favor of bright colors and features reusable packs comprising 25%-30% PCR.



Nourished has partnered with Neutrogena to develop The Ageless Skinstack, personalized 3D-printed skin health dietary supplements that are said to support healthy skin from within. The seven-layer skin health supplements are powered by Neutrogena Skin360's digital skin assessment technology, which IDs the appropriate ingredient mix for each individual consumer. Supplements are a significant opportunity for new and existing beauty brands.



Hero Cosmetics has debuted its Rescue Retinol Nighttime Renewing Cream, which features the Rescue Balm Complex to revitalize skin at night. The cream is said to make the skin look more clean, smoother and bouncier.



Dior has launched its Capture Totale Super Potent Serum, an age-defying serum that is said to make skin appear younger, stronger and "glowing with health" after the first week of use, according to the brand. The serum contains 91% natural-origin ingredients, such as longoza extract boosted with flash multi-fermentation and an exclusive grade of hyaluronic acid.



Keys Soulcare has debuted its first clinically proven product—the Truly Becoming Multi-Benefit Peptide Serum—which is said to plump, hydrate and visibly reduce fine lines and wrinkles with a poly-peptide complex and marine bamboo. The poly-peptide complex is a potent amino acid formulation that helps to visibly firm and improve skin tone.



Florence by mills has launched its latest skin care line, H2Glo, with products that are formulated with a blend of survivalist plants and said to be "designed for busy individuals who may need a faster alternative to their typical skin care routine." The line includes: Plump To It Hydrating Facial Moisturizer, Surfing Under The Eye Hydrating Treatment Gel Pads and True to Hue pH Adjusting Lip and Cheek Balm.

HAIR



Function of Beauty is entering the customized styling category with the launch of its new collection available exclusively at Target. The collection offers products catered toward straight, wavy, curly and coily hair. Products in the collection include: Soft Bounce Texturizing Spray, Zero-Gravity Styling Mousse, Super Shape Curl Cream and Mane Moisture Styling Gel.



Mila Rose Hair Care has launched its Defining Curl Custard with vitamin E and wheat protein, which is said to enhance wavy hair by sealing the moisture and fixing the frizz. Addressing the underserved needs of textured-haired consumers has been an area of increasing focus in the industry. The Mila Rose custard repairs damaged hair, “beautifies the bounce and adds sparkle to your curls without giving a crunchy look,” according to the brand.



Briogeo has launched Destined for Density, a density serum featuring caffeine, biotin and peptides that is clinically shown to increase hair density by up to three times, according to the brand. Destined for Density is a non-greasy, lightweight formula that absorbs quickly onto the scalp. It reportedly encourages nutrient-rich microcirculation to the scalp.



BATH/BODY/GROOMING/FRAGRANCE



Naturium has added to its acne range, launching its Salicylic Acid 2% Body Spray, which penetrates pores and treats and prevents blemishes. Formulated with an encapsulated 2% salicylic acid and niacinamide complex, this blend clears skin and fights breakouts while working to even skin tone and texture. Additionally, the Salicylic Acid 2% Body Spray contains a brightening blend to aid with dark spots and discoloration, as well as a microbiome-supporting fermented complex to promote a healthy and strengthened skin barrier.



Donna Karan New York (DKNY) has released its signature scent, Cashmere Mist, as a deodorant. Cashmere Mist Deodorant offers scent notes of lily of the valley, bergamot, amber, musk, Moroccan jasmine and sandalwood. The Cashmere Mist Deodorant is an aluminum-free, alcohol-free, hydrating, non-irritating, non-allergenic deodorant, designed to offer long-lasting odor protection.



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