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What's Behind Beauty's Growth?



Combined mass and prestige beauty product sales in the United States grew 11% in 2022.

Uncertain economy or not, beauty is a winner. NPD[a] has announced that U.S. prestige beauty sales revenue for 2022 grew by 15% year-over-year, totaling $27.1 billion. Beauty was the *only* sector tracked by the firm to post positive year-over-year unit sales.

Combined, the mass and prestige beauty product market revenue growth for 2022 was 11%. That said, only prestige unit demand remained strong.

In prestige beauty, year-over-year brick-and-mortar retail share grew, while online sales share increased in the mass market.

Across categories, specific segments drove growth.

In makeup, the fastest growing sector was lip products, with sales surpassing pre-pandemic 2019 levels by double-digits. Lip gloss outperformed lipstick, compared to both 2021 and 2019.

Meanwhile, body skin care products grew at more than three-times the rate of facial products, while hair care was driven by masks and targeted treatments.

Elsewhere, prestige fragrance sales were driven by higher fragrance concentrations such as eau de parfums and parfums, and higher-end artisanal fragrance juices.

While NPD is expecting "positive performance" in 2023, there are concerns.

Euromonitor recently reported[b] that "48% of [surveyed] beauty and personal care industry professionals stated that their companies raised prices on some products and services, while 34% raised prices on all products and services."

Indeed, as inflationary pressures shrank profit margins, brands were forced to pass the expense along to shoppers. At the same time, competitive shopping around the holidays forced many of the same companies to offer discounts.

However, discounting hasn't been universal. About 25% of prestige beauty units sold in the United States are sold on promotion, per a research note from The NPD Group's Larissa Jensen. That's lower than pre-pandemic (2019) levels. Even better, the prestige beauty sector's reduced use of promotions hasn't hurt growth in revenue or unit sales.

But brands should beware in 2023. Jensen warned that promotional levels could escalate again this year if shoppers experience category fatigue or overindulgence.

[a]www.npd.com/industry-expertise/beauty/
[b]www.euromonitor.com/article/cyber-monday-promotional-strategies-for-us-anti-ageing-products-amid-inflation-concerns



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INSIDER INSIGHTS:
2023 SKIN CARE INGREDIENT TRENDS

Skin care ingredients are versatile in the benefits they provide to consumers.



Featured insiders…

- Eco-Shell
- Jojoba Desert
- Mibelle Group Biochemistry

Consumers are continuing to be conscious about what ingredients they are using on their skin.

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Global Cosmetic Industry spoke with beauty insiders to highlight recent skin care and sun care trends and recent ingredient launches in those spaces.

Menopausal Skin Care

Christine Meier, digital marketing manager, Mibelle Group Biochemistry, says, "One big trend is menopausal skin care; skin care products, brands and ingredients focusing specifically on the special needs of the skin of menopausal women. Menopause is shifting out of taboo and into the spotlight as women worldwide seek a deeper understanding of changes during this time, carving out plenty of opportunity for beauty and wellness industries to support, educate and empower."

Meier continues, "We launched very successfully NovoRetin, a plant-based alternative to retinol. It is based on mastic and serves as an ideal plant-based retinol alternative, providing both strong anti-aging effects and exceptional benefits for acne-prone skin. Recently, we also launched CALMandrin, an upcycled and sustainable ingredient to combat inflammaging by notably improving the signs of aging, as well as soothing reddened and inflamed skin."

Bioengineered Ingredients

Meier says, "The other trend we see is bioengineered ingredients. As climate change and the limitation of natural resources make sourcing natural ingredients challenging, lab engineering will be a concrete option to provide effective ingredients in a sustainable way and create a new story in the future of facial care. The common ground for lab-grown movement is the conservation of natural resources. The idea behind this is that by growing ingredients biotechnologically, we can avoid depleting natural resources without compromising on efficacy."

"The word responsibility represents the dominant trend in skin care ingredients," says Anna Aharoni, Ph.D., MBA, Jojoba Desert.

Skin Barrier Repair

Anna Aharoni, Ph.D., MBA, R&D manager, Jojoba Desert, says, "The word responsibility represents the dominant trend in skin care ingredients. As a term, responsibility used to refer to the sourcing and production process of ingredients; nowadays, it refers to the manufacturer's responsibility toward consumers, as well. Responsibility to provide ingredients that are natural, ethical, and healthy while at the same time providing proven efficacy in protecting and rehabilitating skin conditions. Therefore, it comes as no surprise that skin barrier repair has become a top priority in 2023. Strong skin barriers provide protection against external stressors, such as pollution and UV radiation, as well as water retention to keep the skin hydrated and transport vital nutrients. When the skin barrier is disrupted, it can cause or exacerbate other skin conditions such as eczema, psoriasis, rosacea, and acne. Strong skin barriers are the key to healthy, even, and younger looking skin."

Aharoni continues, "There is one substance that has proven to be a game changer in this arena: pure phytoene. In topical application, pure phytoene is designed to strengthen the skin barrier, prevent signs of aging, affecting the skin's appearance and resilience, providing impressive improvement in skin condition. Recently launched JD Phyto-Or 1% by Jojoba Desert addresses these exact concerns and trends. JD Phyto-Or 1% (INCI: *Simmondsia chinensis* (jojoba) seed oil; *Blakeslea trispora* mycelium extract/ C30-45 Olefin) is a natural active skin repair, enhancing skin elasticity and improving skin tone. JD Phyto-Or 1% features both JD Jojoba oil and concentrated phytoene, extracted from a non-GMO fungi, in a solvent-free process, produced through a controlled fermentation pathway. This active provides exceptional benefits for skin and hair, allowing for reduced vulnerability to oxidation, as well as the prevention of oxidative stress-induced damage and inflammation stimulated by UV irradiation and pollution. JD Phyto-Or 1% protects natural hydro lipid skin barrier, evens skin tone, reduces wrinkles by enhancing elasticity and skin firmness, while improving skin smoothness. It is a clear, low-viscosity, oil-soluble yellow liquid available for a wide variety of skin care applications."

Clean Beauty

Helen Cantrell, director of sales and marketing, Eco-Shell, says, "In the skin care ingredient space, we are seeing trends toward sustainability and clean beauty. Consumers are becoming more thoughtful about what they are using and putting on their face and body. They are also critically thinking about how the products we use impact our shared world. Eco-Shell manufactures walnut shell media for skin care in a wide range of standard and custom grades. We are continuously working with R&D formulators to provide them with the right size to meet their needs." ■

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Brands that can harness the levers of sustainability, inclusive multifunctionality and sensoriality will lead the market.

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SUN CARE'S 2023 GLOW UP

Multifunctional, sustainable products and targeted care are driving the sector's skinification, as well as consumer interest.

The global sun care product market was valued at $13.03 billion in pre-pandemic 2019, according to Fortune Business Insights data[a]. Following the turmoil of 2020 lockdowns, the prestige sunscreen sector boomed by 60% year-over-year in Q1 2021 alone, per NPD[b]. Given that momentum, Fortune Business Insights has projected the worldwide sun care market to reach $16.84 billion by 2027.

This growth will come from an array of skinified multifunctional products and sustainable innovations from suppliers and brands. It also derives form changing attitudes.

"[One] trend on the consumer side is the increased daily use of sunscreen and focus on protection from UV rays," says Sundeep Gill Ph.D., co-founder, Sundeep Cosmetics. "The days of tanning beds and laying out in the sun are not as prevalent."

So what does this mean for brands and their innovation partners? Let's break it down.

Top Sun Care Concerns

According to Spate[c], there are 25.3K average monthly U.S. searches for "sun damage," representing growth of 28.9% since last year. Aside from Garnier, few brands are directly associated with the concern.

Associated search terms include face, skin, eye and chest, revealing wider damage worries. In addition, solution-based searches included



Everyday Humans' Resting Beach Face SPF 30 Sunscreen Serum exemplifies the skinification of sun care.

[a]www.fortunebusinessinsights.com/sun-care-products-market-103821

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

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

"reverse," "how to, get rid of," "protect" and "over the counter." Associated treatment searches include blue light, lasers and chemical peels.

Skinification of Sun Care

Per Spate data, topical ingredients associated most with sun damage online searches include skin care favorites such as retinol, coconut oil and rosehip oil. This pattern reflects a wider skinification of the sun care category.

"The skinification trend has led to more sun protection products with skin care benefits like moisturization, anti-aging and radiance," explains Brian Grady, senior marketing specialist, DSM. "We can also see that there are more launches of ethical and environmentally friendly products over the last few years." More on that in a moment.

Supergoop!'s Daily Dose Bioretinol + Mineral SPF 40 with Bakuchiol typifies the skinification dynamic. The plant-based retinol alternative treatment gently targets visible fine lines and wrinkles. The vegan formulation pairs zinc oxide (16.5%) with bakuchiol, the collagen-boosting and blue-light-filtering L-carnosine peptide, and English oak bark extract for antioxidant benefits and a natural beige tint.

Similarly, Everyday Humans' Resting Beach Face SPF 30 Sunscreen Serum comprises homosalate, octisalate, avobenzone and octocrylene for protection against UVA/UVB rays; hyaluronic acid and pentavitin to boost moisture and restore skin's suppleness and volume; spinach and green tea to fend off indoor and outdoor aggressors while strengthening the skin's natural defense systems; and kopara extract to defend the skin against urban pollution.

Mara's lightweight Algae + Zinc Sea Kale Mineral Sunscreen Sérum SPF 30 features vitamin C-rich blue sea kale to counteract the signs of photoaging and fine lines, as well as sea aster to reduce redness associated with skin sensitivity and sunburns. The formulation complies with the Clean + Planet Positive at Sephora seal.



Mara's lightweight Algae + Zinc Sea Kale Mineral Sunscreen Sérum SPF 30 features vitamin C-rich blue sea kale to counteract the signs of photoaging and fine lines, as well as sea aster to reduce redness associated with skin sensitivity and sunburns.



Cay Skin by Winnie Harlow recently launched the Isle Lip Balm SPF 30 with Sea Moss and Aloe Stem Cells, typifying the innovation coming to the sector.

Finally, e.l.f. Suntouchable! Whoa Glow Broad Spectrum SPF 30 Sunscreen doubles as a hydrating priming lotion, imparting a sheer peach finish with a hint of shimmer. Key ingredients include aloe, hyaluronic acid and squalene, as well as the sunscreen actives avobenzone (3.0%), homosalate (9.0%), octisalate (5.0%) and octocrylene (7.0%).

Lip Sunscreens Boom

One targeted area riding the skinification wave is lip care. According to Beauty Pie data, lip sunscreen searches jumped 72% in 2022.

Earlier that year, Spate reported that there were 17.5K average monthly U.S. searches for lip sunscreen, a growth of 28% year-over-year. A wide array of brands were associated with the category, including Coola, Aquaphor and Elizabeth Arden.

Search terms related to lip sunscreen include tinted, natural, ingredients, treatment, sensitive, balm and gloss.

Cay Skin by Winnie Harlow recently launched the Isle Lip Balm SPF 30 with Sea Moss and Aloe Stem Cells, typifying the innovation coming to the sector. They brown sugar-flavored hydrating and protective balm features hydrating sea moss, soothing allow stem cells and antioxidant vitamin E.

Sustainable Sun Care

Everyday Humans' recent expansion into 160 U.S. CVS BeautyIRL stores served as a ratification of the brand's inclusive, multipurpose, Gen Z-centric ethos—and sustainability bonafides.

At the time, Charlotte Chen Pienaar, Everyday Humans' founder, said, "We are excited that CVS is bringing visibility to minority-owned brands and believe that inclusive and sustainable sunscreens are what their customers are looking for and it should be convenient for them to find that."

Rising engagement in sustainable sun care began, of course, at the R&D level, where new innovations continue to emerge.

"[I am seeing] extensive innovation

in using nature-inspired ingredients while striving for the same level of efficacy that we have seen from synthetic alternatives," says Gill. "There is still a long way to go but we are moving in the right direction."

He adds, "SPF is becoming a staple product for just about every cosmetic brand and with this comes the requests for natural based SPFs to aesthetically perform, as well as the synthetically based alternatives. We all know the thick chalky white paste that zinc oxide SPF originally was and since then we achieved more what was once thought possible with better particle size control of the active."

Gill continues, "Considering the limited options that our company started out with when pioneering natural safe SPF products for our clients, we have been very pleased to see the recent increase and drive for raw materials suppliers to innovate and push their boundaries away from the standard synthetic options. A few of our favorite ingredient innovations this year are plant-derived UV boosters and film formers."

He notes that plant-derived UV boosters can be non-irritating while offering ease of use during formulating. In addition, they often comply with multiple certifying bodies.

Gill concludes, "Natural film formers have also been a favorite, with reduced tackiness while still providing effective 80-minute water resistance. Having multiple options on the market with more on the way shows that what was once thought to be a pipe dream is possible with the right motivation from the end care user."

These innovations have allowed Sun Deep Inc. to develop non-chemical sunscreens for its customers. Utilizing plant-derived UV boosters, preservatives and film formers, an SPF 30, 80-minute water resistance was achieved by the firm with no silicone.

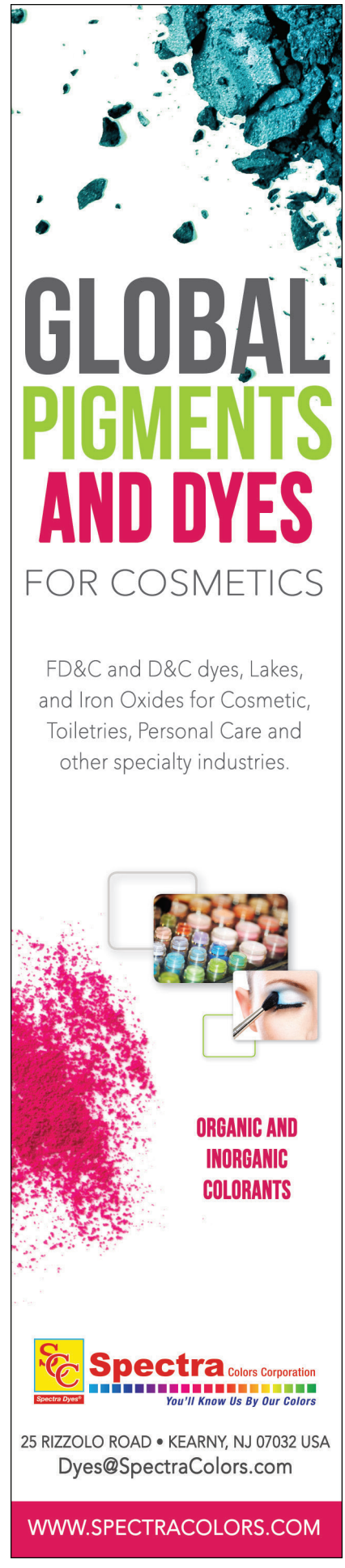
New Ingredient Technologies on the Horizon

As Gill noted, new ingredient technologies are key to expanding the sun care sector.

Luciana Uttembergue D'Elia, senior technical and marketing manager at DSM, explains, "The sun care industry has faced a long journey over the past 20 years with changing regulations and increasing data demands from the FDA has made for a murky pathway forward on how to get a new UV filter approved in the United States. DSM began engaging with the FDA in 2019 to get bemotrizinol—Parsol Shield—approved in the United States. As a result, we are paving the path for the



Symrise's Neo Heliopan EHT is a UVB absorber is well-suited for high-SPF and water-resistant sun protection applications.



industry toward innovation in UV filters. DSM began filling the data gaps identified by the FDA and plans to provide the full dossier to the FDA in 2023 with the intention of approval of GRASE status for Parsol Shield by the FDA in 2024. We are confident that it will be the first UV filter added to the monograph in the United States in 20 years."

Elsewhere, Assure+ (INCI: *Pongamia pinnata* seed extract) is a new high-purity extract that was recently shown to boost properties of SPF and UVA-PF by 20-40%. The antioxidant represents a collaboration between EverCare and Kancor, with distribution by Ultra Chemical, and is extracted from the *Pongamia* species using eco-friendly principles.

According to EverCare, Assure+ increases both SPF and UVA-PF values when used in mineral-only and hybrid sunscreen formulations. Use of Assure+ reportedly maintains UVA-PF to SPF ratios as well as critical wavelengths to help meet all UVA global requirements.

Assure+ is a COSMOS-certified natural, photostable booster pressed from seeds. The technology is available as a concentrated solid that can be incorporated into the oil phase.

In vitro studies featured SPF 30 formulations dosed with either 0.10% or 0.25% Assure+. In one example, 25% Zano 10 Plus (INCI: zinc oxide (and) triethoxycaprylylsilane), a UV filter, paired with 0.25% Assure+ achieved an SPF above 50.

Meanwhile, Grant Industries now offers a series of dispersions and blends that provide high performance in formulations comprising chemical or inorganic filters offering UVA and UVB defense and long wear and daily wear performance.

Grant's UV Protection Series features complimentary pairs of titanium dioxide and zinc oxide products that can be formulated together to optimize the desired SPF profile, per the company. The materials are ideal for sunscreens, daily wear products, and color cosmetic formulations with UVA and UVB protection.



Grant Industries now offers a series of dispersions and blends that provide high performance in formulations comprising chemical or inorganic filters offering UVA and UVB defense and long wear and daily wear performance.

The newest additions to Grant's UV Cut Protection Series include:

- UV Cut TiO_2-65-SU (65% dispersion of ultrafine titanium dioxide in C13-15 alkane)
- UV Cut TiO_2-65-CC (65% dispersion of ultrafine titanium dioxide in coco-caprylate/caprate)
- UV Cut ZnO-65-SU (65% dispersion of ultrafine zinc oxide in C13-15 alkane
- UV Cut ZnO-65-CC (65% dispersion of ultrafine zinc oxide in coco-caprylate/caprate)

Finally, in response to consumer demand for effective and safe modern sunscreens, as well as waning acceptance for traditional UV filters, Symrise has released Neo Heliopan EHT (INCI: ethylhexyl griazone), a UVB absorber well-suited for high-SPF and water-resistant sun protection applications.

The ingredient's solubility in polar oils makes it easy to incorporate into the oil phase of sunscreens. It also is said to work well in combination with other organic UV filters, and in synergy with mineral UV filters such as zinc oxide.

In addition, Neo Heliopan EHT can increase the SPF of products such as day creams, the company reports. It also works well with all skin tones and types, according to Symrise,

including in products for sensitive skin, such as for children.

In addition, Gattefossé has launched a sun care kit composed of eight formulas with four key ingredients designed for sensory, performance and stability properties that support the efficacy of UV filters while removing the discomfort of a greasy, sticky feeling.

The ingredients include Emulium Illustro (INCI: polyglyceryl-6 polyhydroxystearate (and) polyglyceryl-6 polyricinoleate), a w/o emulsifier that is compatible with organic and mineral UV filters, and Emulium Dolcea MB (INCI: cetearyl alcohol (and) glyceryl stearate (and) jojoba esters (and) *Helianthus annuus* (sunflower) seed wax (and) sodium stearoyl glutamate (and) water (aqua) (and) polyglycerin-3), an o/w emulsifier designed to create stable textures with a soft and non-tacky feel.

Also included were Gattefossé's Emulium Mellifera MB (INCI: polyglyceryl-6 distearate (and) jojoba esters (and) polyglyceryl-3 beeswax (and) cetyl alcohol) an o/w emulsifier said to support the formulation of sun care products with a light and non-greasy finish, and Acticire MB (INCI: jojoba esters (and) *Helianthus annuus* (sunflower) seed wax (and) *Acacia decurrens* flower wax (and) polyglycerin-3), an active texturizing agent that reportedly improves the sensoriality of sun care products by reducing the greasy and tacky feel. It also improves durability of the protective film on the skin, according to Gattefossé.

The concept sunscreens were tested in real-use conditions utilizing a UV camera to visualize the formulas upon application to the skin, as well as how they evolved over time.

2177-7.03 Mineral Shield SPF50, formulated with Emulium Illustro and Gatuline Radiance (INCI: propanediol (and) *Evodia rutaecarpa* fruit extract) is neither sticky nor greasy and is easy to apply. Meanwhile, 2494-1.13 Powdery Stick SPF50+ is made with Emulium Illustro, Acticire MB and Lipocire A SG (INCI: C10-18 triglycerides) and is designed for areas of the body that are prone to UV damage, such as the nose, cheekbones, scars and tattoos. Once applied, it is said to leave a dry and powdery finish.

Looking ahead, brands that can harness the levers of sustainability, inclusive multifunctionality and sensoriality will lead the market. ■

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With shoppers turning to search engines for skin care research, brands have an opportunity to capture and act on the resulting trove of data.

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WHAT CONSUMERS WANT FROM SKIN CARE

From consumer data to ingredient R&D, new trends are surfacing.

When it comes to skin care concerns, ingredients and general education, consumers are sidestepping brands and dermatologists and heading to Google or their favorite social platforms. What can brand leadership, R&D and marketing learn from their behaviors?

Robust Category

U.S. prestige skin care sales grew 12% in 2022, according to NPD data[a], with body products growing at more than three times the rate of facial products.

Kline reports[b] that "97% of consumers have continued to use the same number of skin care products in their at-home regimens or even increased the number of products that they use daily over the last six months." At the same time, "many of these consumers plan to spend the same amount—or more—on professional skin care products in 2023."

At the same time, consumer curiosity is generating large amounts of actionable data, while also creating a challenge for brands seeking direct communication with shoppers.

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

[b]https://klinegroup.com/articles/five-beauty-and-wellbeing-trends-that-will-define-2023/

Consumers' Skin Care Search Habits

A recent Mintel report[c] noted that consumers' focus on value has led to a rise in popularity for clinical skin care brands. In fact, 53% of U.S. beauty and personal care consumers research beauty ingredients to understand product effectiveness, per Mintel.

Spate[d] recently broke down the fastest-growing searches among skin care ingredients, uncovering a key interest in clinical materials. This jibes with 2022 NPD data that indicated U.S. consumer attention was shifting toward clinical brands founded by doctors, chemists, apothecaries or estheticians, as well as skinimalism with potent and multipurpose ingredients.

In its latest search analysis[d], Spate recognized a dominance of natural/botanical clinical materials, perhaps reflecting a desire for more gentle care (**T-1**). One exception was copper peptides, which offer anti-aging benefits and are present in products such as Biossance's Squalane + Copper Peptide Rapid Plumping Serum and The Ordinary's "Buffet" + Copper Peptides 1%.

On the natural side, trending ingredients included snail mucin, rice and chebula, an Ayurvedic material with anti-inflammatory effects in skin care. Another trending ingredient, tepezcohuite, is also derived from

[c]www.mintel.com/beauty-and-personal-care-market-news/beauty-trends/

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

T-1. Top-growing skin care ingredient searches for the 12 months ending December 2022

Example use of **increase** search data: *Tretinoin, as searched alongside skincare products, is experiencing an increase of 32.0K searches on average every month since last year.*

Trend	Increase↓
tretinoin	32.0K
glycolic acid	15.0K
snail mucin	14.1K
rice	9.1K
chebula	4.0K

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

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

NEW SKIN CARE INGREDIENT TECHNOLOGIES

Anti-stress Skin Care

Oat Cosmetics has debuted Rejuvaveen (INCI: *Avena sativa* (oat) bran extract), an active ingredient which maintains stratum corneum integrity, fights against stress-induced skin thinning, combats dry desquamation to maintain skin hydration and improves skin smoothness.

Rejuvaveen is an oat beta-glucan complex active that influences skin biology and appearance due to its molecular profile, according to Oat Cosmetics. The key elements of this active ingredient include anti-aging oat beta-glucan, hydrating starches, skin-beneficial lipids and anti-inflammatory tryptophan.

Study results from Oat Cosmetics indicated that oat beta-glucan was able to penetrate lower levels of the skin, and therefore could interact with fibroblasts and other structural elements. The route of penetration was not by direct passage through the cells of the epidermis or dermis, but rather passing through the intercellular matrix. This review reportedly demonstrates that Rejuvaveen will penetrate the epidermis and dermis layers of the skin.



Oat Cosmetics' Rejuvaveen reportedly maintains stratum corneum integrity, fights against stress-induced skin thinning, combats dry desquamation to maintain skin hydration and improves skin smoothness.

Oils for Water-based Skin Care

Berg+Schmidt will showcase a range of active oils at in-cosmetics Global 2023 in Barcelona. The line includes BergaCare AquaLipids that are water-dispersible processed natural oils for a variety of applications, such as water-based serums, fluids, toners and o/w emulsions. The ingredients can modulate sensory properties of the finished product.



Berg+Schmidt's BergaCare AquaLipids are water-dispersible processed natural oils for a variety of applications, such as water-based serums, fluids, toners and o/w emulsions.

AquaLipids are not chemically modified; moreover, they mix with water without solubilizers, enhancing skin compatibility and reducing the foaming sensation during application.

At the event, Berg+Schmidt will present a sample kit showcasing serums and gels containing several BergaCare AquaLipids that target the needs of different skin types:

- BergaCare AquaLipids Cassis BR contains a combination of blackcurrant and rosehip seed oil, resulting in a high content of polyunsaturated fatty acids, e.g., gamma- and alpha-linolenic and linoleic acids. This composition offers improvement in the regulation of sebum production and anti-inflammatory effects, along with a pleasant skin feel and fast absorption. This product can also be used for oily skin concepts.
- Pomegranate seed oil contains punicic acid, which has a powerful antioxidant effect and helps counteract aging in mature skin. It also contains numerous skin regenerating substances such as phytosterols, polyphenols and flavonoids. This oil is processed into BergaCare AquaLipids Punica PS along with sea buckthorn oil.
- BergaCare AquaLipids Bisabolol AR is designed for sensitive skin due to its anti-inflammatory and anti-bacterial properties. Key ingredients include an oily extract with a high concentration of alpha-bisabolol, a chamomile-derived molecule and rice bran oil.
- BergaCare AquaLipids Melon BK contains the oil of the Kalahari melon. With its high linoleic acid content, it provides building blocks for the development of the skin barrier and supports epidermal moisturization and hydration. The second key ingredient is *Bulbine frutescens* leaf juice, which supports elasticity and collagen production, making it ideal for dry, thirsty skin. ■



Accupac's research and innovation department, Cobalt Labs, has developed a bead resurfacing serum with vitamin B3 and alpha hydroxy acids (AHA).

traditional medicinal practices, in this case in Central and South America. In skin care, the ingredient reportedly addresses psoriasis and acne.

A new StyleSeat survey[e] finds that Google ranks as the most common place people get their skin care information, followed by family advice and social media influencers. Only 8% of people get their skin care knowledge and tips from the one person who should know the most—their dermatologist! Notice that brands don't even get mentioned.

Jordy Pickel, senior director of sales and marketing at Accupac, notes that the consumer's interest in researching products, ingredients and trends was increasing before COVID, and was boosted by a collective shift in attention toward health during the pandemic. Interestingly, of the internet users who research ingredients to better understand ingredient effectiveness, 40% research to make sure ingredients are excluded from products, while 39% do so to make sure certain ingredients are included (data per Mintel's "Ingredient Trends in Beauty and Personal Care - US - 2022).

Pickel argues that today's consumer influencers are more educated and interested in the science behind the ingredients. In response, Accupac's research and innovation department, Cobalt Labs, has developed formulations that reflect the contemporary consumer mindset. For instance, a bead resurfacing serum with vitamin B3 and alpha hydroxy acids (AHA).

"Vitamin B3 contains the active niacinamide, which has been shown to have both anti-inflammatory and brightening properties," says Pickel. "This helps in acne formulations to reduce blemishes and calm skin, or as a brightening booster to daily moisturizers."

Cobalt Labs offers formulations with niacinamide levels of 1-3% to accommodate sensitive skin.

[e]www.styleseat.com/blog/skin-care-across-america/



Niacinamide generates 135K Google searches per month, according to Pickel, up 23% over last year. Notably, searches for the term "niacinamide serum" have grown 83% year-over-year.

He adds, "Alpha hydroxy acids, such as glycolic acid, are excellent in exfoliating the layers of the skin. The AHAs are delivered in a micro-dosed format—encapsulated and delivered in lower doses—allowing for use in sensitive skin as well."

Pickel notes that Google searches for the term "glycolic acid benefits" have grown 125% year-over-year.

"When used in combination with each other, the vitamin B3 and AHAs team up in boosting any acne- or blemish-centric product," he explains.

In addition, Pickel points out that search data reveals that consumers are combining ingredients to product searches. This offers potential for savvy brands to build loyalty with shoppers.

However, he warns, information access is a double-edged sword. Non-scientific sources can spread misinformation, forcing brands to clearly communicate and quantify efficacy in marketing. Pickel acknowledges, "That level of efficacy testing can become an expensive component."



Spate has detected a nearly 46% rise in U.S. searches for lactic acid serums.

What Consumers are Searching For

Understanding today's information ecosystem and harnessing its benefits are critical for today's skin care brands.

According to StyleSeat, 78% of the people surveyed said they felt the need to take better care of their skin. Their top skin concerns were:

- Dryness: 52%
- Acne: 36%
- Under eye circles: 36%
- Wrinkles: 34%
- Sun damage: 28% (see Page 10)
- Obvious pores: 24%
- Redness: 22%
- Pigmentation: 19%

Spate data goes beyond self-reporting to see what shoppers are actually searching for on Google. The firm found that, as of November 2022, average monthly search volume for key concerns had grown as follows: dermatitis, up 68.7K year-over-year; sunburn, up 43.6K year-over-year; milia, up 30.9K year-over-year.

In January 2023, Spate reported that the skin barrier topic generates just 3.5K average monthly branded searches, showing that no one player owns this space. Key formats associated with the term include cream, oil and serum. Associated searches include acne and dermatitis. This opens the possibility for brands to offer multifunctional skin care that hits several closely associated worries simultaneously.

Spate has also detected a nearly 46% rise in U.S. searches for lactic acid serums. Associated searches such as resurfacing, hydrating, peel and exfoliating can help brands determine which claims shoppers are looking for from these serums. Meanwhile, associated searches for squalane and glycolic acid can direct formulation teams in determining the types of materials shoppers want to see on serums' INCI lists. ■


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FRAGRANCE'S FUTURE: TECH MEETS SUSTAINABILITY

From AI-generated fragrances to decarbonized ingredient palettes, the industry is evolving into a new phase.



"The digitization of the human senses of vision and hearing have led to incredibly impactful leaps in technology that enrich our lives, from better healthcare to photography to digital music," says Alex Wiltschko, Ph.D., of Osmo. "We're excited to play a part in unlocking the potential for olfaction to change the world in fields like flavor [and] fragrance, medical diagnostics, agriculture and beyond."

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Even as fragrance's growth continued in 2022, the sector's future was being shaped by the twin drivers of tech and sustainability. Here, we outline the latest dynamics.

Behind Fragrance's Sales Rise

U.S. prestige fragrance sales[a] increased 11% in 2022, driven by higher fragrance concentrations such as eau de parfums and parfums, and higher-end artisanal fragrance juices. The mass market[b], meanwhile, grew a much more modest 1.2%, totaling $992,761,833. Average unit prices were up almost 7% year-over-year, though unit sales actually dropped 5.2%.

Scent's Tech-driven Future

Computers that Smell

Osmo, a new startup based in Cambridge, Massachusetts, seeks to endow computers with a sense of smell to improve the health and well-being of human life. The organization recently raised a $60 million series A funding round led by Lux Capital and Google Ventures.

Led by neuroscientist and entrepreneur Alex Wiltschko, Ph.D., Osmo's team is said to have built the first map of odor to predict what a molecule smells like from its structure. Osmo is now using this map and generative artificial intelligence (an AI model similar to Stable Diffusion and ChatGPT) to create a new generation of better, safer, environmentally friendly aroma molecules for the growing flavor and fragrance market.

Osmo combines machine learning, data science, psychophysics, olfactory neuroscience, electrical engineering and chemistry in a multidisciplinary approach. It was founded with the goal of creating the next generation of aroma molecules for everyday products such as perfumes, shampoos, lotions and candles.



Rather than solely evaluating scope 1 and 2 GHG emissions, one recent study is said to offer a holistic perspective, integrating scope 3 emissions, which refer to the indirect emissions across the entire value chain—notably, consumer usage of products.

Osmo's digital olfaction research was validated at Google Research[c], including a 2019 study that used graph neural networks to predict the smell[d] of a molecule from its structure. In addition, three papers produced by Osmo's core technical team while researchers at Google Brain are currently under review at peer-reviewed journals[e].

"The digitization of the human senses of vision and hearing have led to incredibly impactful leaps in technology that enrich our lives, from better healthcare to photography to digital music," says Wiltschko. "We're excited to play a part in unlocking the potential for olfaction to change the world in fields like flavor [and] fragrance, medical diagnostics, agriculture and beyond."

He adds, "To tackle this difficult, historic problem, we've brought together a founding team of world-class neuroscientists, machine learning

[a]www.npd.com/industry-expertise/beauty/
[b]https://nielseniq.com/global/en/insights/

[c]https://ai.googleblog.com/2022/09/digitizing-smell-using-molecular-maps.html
[d]https://ai.googleblog.com/2019/10/learning-to-smell-using-deep-learning.html

[e]www.biorxiv.org/content/10.1101/2022.09.01.504602v2.full.pdf; www.biorxiv.org/content/10.1101/2022.07.21.500995v3; www.biorxiv.org/content/10.1101/2022.09.01.504601v2

(Continued on Page 26)

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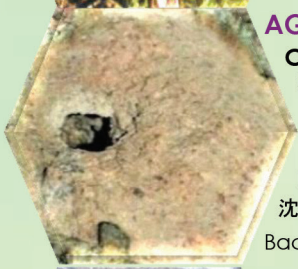
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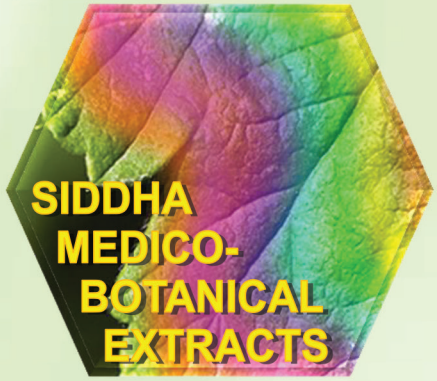
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Dark Ultra Brilliant Yellow 亮黄 Yellow Light 浅黄
Dark Black 黑

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Red Light / Scarlet Red 鲜红 Ultra Sky Blue 天蓝
Dark Black 黑

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(Continued from Page 23)

experts, psychophysicists, hardware and software engineers, data scientists, and chemists. I'm looking forward to the journey with them and others who join us along the way."

AI Scent-to-color Translator

Givaudan's Myrissi is an AI technology said to translate scents into color patterns. The technology is currently only available in Western Europe, the United States, Brazil and Japan.

Myrissi reportedly captures and predicts the spontaneous emotional perception of fragrance experienced by consumers, determining the best alignment among colors, emotions and scents. The algorithm is modeled on a database of more than 25,000 consumer tests.

The platform has the ability to drive the creative and product development process starting either from a chemical composition to predict the color code association, or from a chromatic base to determine the appropriate olfactive affiliation, per Givaudan. It also generates the visual mood board and the verbal ecosystem surrounding any fragrance: from packaging to campaign storytelling, consumers' emotional nuances are translated in their most complete and consistent form, according to the company.



Osmo's AI was created with the goal of creating the next generation of aroma molecules for everyday products such as perfumes, shampoos, lotions and candles.

What's Next in Sustainable Fragrance

The fragrance industry has arguably operated with sustainable materials since its inception. However, the sophistication and scale of its efforts in 2023 are unprecedented.

Eco Fragrance Design Tools

Uniting tech and sustainability, Firmenich has launched EcoScent Compass Next Generation, an update of its 2018 digital platform for eco-fragrance design. The new iteration includes expanded sustainability data and verifiable claims, per the company, providing a more precise and complete sustainability view of any fragrance.

The update comprises 45 fragrance claims and 20 ingredients claims that help clients to translate numbers into proof of impact when communicating sustainability progress with consumers. Using the system, perfumers can optimize fragrance designs against more than 80 data points for each ingredient and three key pillars: circular creation, climate and nature, and impact on people and community.

Firmenich perfumers have the EcoScent Compass integrated into their workstations, enabling the design of conscious fragrances.

"Companies must not only use tools to record, report and act on sustainable business data within their operations but also share it across their networks of suppliers and partners to unlock the potential for positive impact at scale," says Michal Benmayor, VP for Firmenich's global perfumery sustainability. "Challenges are evolving and what needs to be addressed today are the major concerns on carbon emissions and biodiversity."

Defossilizing the Fragrance Palette & Formulations

Firmenich has launched the Re:New Collection of 10 renewable and upcycled ingredients as part of its ongoing efforts to reduce the perfumery industry's reliance on fossil fuels.

The collection particularly addresses the gap in renewable floral and woody materials. For instance the collection includes Anthamber Premium, also known as Iso E Super, well-known as a powerful woody molecule with a cedarwood note and violet undertones, per Firmenich. In addition, Re:New includes renewable floral molecules from the geraniol family to deliver feminine, fresh and aromatic notes of rose, as well as slightly green facets to compositions.

The materials resulted from the company's Sylvergreen innovation program, which converts fragrance ingredients obtained through traditional petrochemistry means into materials derived from renewables—in this case, pine trees.

The trees are grown in poor soil ill-suited to food crop production, according to Firmenich. The pine materials are upcycled and transformed in Firmenich facilities using green chemistry principles. The company aims to make 100% of its fragrances renewable by 2030.

Meanwhile, Solvay's production of Rhovanil vanillin in Saint-Fons, France has been accredited as compliant with the mass balance accounting regime of the International Sustainability and Carbon Certification (ISCC) PLUS system. (Rhovanil MB can be used as a drop-in replacement within home and personal care fragrances, per Solvay.) The certification confirms the controlled use and traceability of renewable feedstock in the company's vanillin.

The mass balance concept provides a defined set of rules for tracking and tracing the content of circular and renewable feedstock in materials and end products. As a result, users of certified materials can claim a reduced carbon footprint for their formulations, and brand owners can document the enhanced sustainability to consumers.

Elsewhere, LMR Naturals by IFF has conducted a study on the carbon footprint of the company's perfumery and natural flavors ingredients. The company worked in partnership with Carbone 4—a consulting firm that specializes in low-carbon strategy and climate change adaptation—to complete a greenhouse gas (GHG) study.



Firmenich has launched the Re:New Collection of 10 renewable and upcycled ingredients as part of its ongoing efforts to reduce the perfumery industry's reliance on fossil fuels.

Rather than solely evaluating scope 1 and 2 GHG emissions, the study is said to offer a holistic perspective, integrating scope 3 emissions, which refer to the indirect emissions across the entire value chain—notably, consumer usage of products.

Bernard Toulemonde, consultant and natural ingredients expert, stated, "Indeed, 95% of LMR's carbon footprint can be traced to scope 3 activities. It's then easy to understand the breadth of the gap between the data published until now, limited to Scopes 1 and 2, versus the reality of the actual footprint encompassing the full value chain."

Per LMR, to evaluate the carbon footprint of ingredients, the team followed a lifecycle approach to generate data such as flow inventories for agricultural practices, extraction, transport and purification practices. The study identified high-volume ingredients such as patchouli or clove, as well as specific areas of importance to reduce carbon footprint.

It also outlined the large burden of first transformation—in most cases distillation or solvent extraction—in the total footprint, as well as the ways to reduce it. For example, significant GHG reductions are possible through modernizing production units, improving yields and by ensuring sustainably harvested fuelwood is used during extraction. LMR conducted an exercise for each ingredient, with the knowledge that the carbon footprint

of fragrance ingredients may vary by three orders of magnitude.

"Comparison on an absolute level per kilogram of ingredient, however, misses the true point to this effort," says Todd Krieger, senior lead lifecycle assessment scientist at IFF. "The goal is to provide lower-impact fragrances in use. Therefore, [the] dose rate in a fragrance and olfactory performance need to be included. But, having data on an ingredient basis allows a customer to calculate the carbon footprint of a perfume or aroma formula, thanks to the precision of this unique approach. This data allows clients to assess the impact of an LMR Naturals by IFF product in its formula."

As the fragrance sector grows more transparent and data-heavy, new tools and platforms will continue to advance the industry. ■



LMR's greenhouse gas study identified high-volume ingredients such as patchouli or clove (pictured), as well as specific areas of importance to reduce carbon footprint.



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Ashland's Saffragyl biofunctional, derived from upcycled saffron flowers, reportedly prevents early gum problems and strengthens sensitive and irritated gums.

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THE BEAUTY INGREDIENT AGENDA: MARCH 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.

Encapsulated Bakuchiol for Time-released Anti-aging

Berg+Schmidt will soon debut BergaCare SmartLipids Bakuchiol (*Psoralea corylifolia*), a lipid-based delivery system, at the forthcoming 2023 in-cosmetics Global in Barcelona (March 28-30). The encapsulation system supports the timed release of bakuchiol for anti-aging and anti-wrinkle benefits. It also reportedly restores the skin's barrier and has formulation advantages, even in aqueous applications.

Last year, Spate[a] reported 4.0K average monthly searches for bakuchiol serum, a retinol alternative that is increasingly popular due to its tolerability on sensitive skin. Searches grew 24.5% between 2021 and 2022.

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



*Sederma's new active ingredient, derived from plant cell cultures of scarlet bee balm (*Monarda didyma *L.) leaves, is designed to fade pigmentation caused by aging and sun exposure.*

Related search terms unsurprisingly included retinol and alternative (to retinol). The top concerns searched alongside retinol are acne (34.3K), wrinkles (20.1K), aging (7.2K) and scarring (6.6K).

Sustainable Hyperpigmentation Treatment

Sederma's in-cosmetics Global presence will serve as the debut for a new active ingredient designed to fade pigmentation caused by aging and sun exposure. The technology reportedly results in a more even skin complexion. Derived from plant cell cultures of scarlet bee balm (*Monarda didyma* L.) leaves, the ingredient offers sustainable attributes.

Marine-derived Anti-aging

Givaudan's forthcoming marine biotechnology-derived Gravityl reportedly improves the facial contour. Set to debut at in-cosmetics Global, the technology is produced using the power of sunlight and the capture of CO_2, per the company, and addresses the effects of gravity on the skin.

Raspberry Multifunctional

Ashland's new Phyteq raspberry technology is a nature-identical multifunctional preservative booster based on raspberry ketone. In formulations, the technology helps to protect formulations against spoilage. It also acts as a free radical scavenger and strong antioxidant in skin care products, protecting the elasticity of the skin.

Non-irritating Deodorant Care

EverCare's Zano D zinc oxide imparts odor control and skin protection in transparent formulations. The soothing anti-inflammatory material is appropriate for underarm odor control where irritation from persistent shaving is common, per the supplier. As such, Zano D can allow brands to formulate without aluminum, zirconium salts or baking soda.

In a natural deodorant stick concept formulation, Zano D reportedly provided significant reduction in odor over 24 hours when evaluated on a scale of 1-5 as compared to the control.

INCI-friendly Naturals

Ashland's The Natural Line highlights naturals with easily recognizable INCI descriptions and defined compositions. Hyalurotech sodium hyaluronate, which comprises various molecular weights, hydrates and plumps the skin of the face and body. The varying weights allow for various depths of penetration into the skin, per the supplier.

Other entrants in the range include:

- Puraloe aloe vera (INCI: *Aloe barbadensis* leaf juice powder) for soothing and hydrating the skin;
- Orchid complex OS ester (INCI: caprylic/capric triglyceride (and) *Cymbidium grandiflorum* flower extract), known for its hydrating and moisturizing properties;
- refined shea butter, a versatile and nourishing skin care ingredient, and;
- American clary sage essential oil (INCI: *Salvia sclarea* (clary) oil), used today in aromatherapy.



EverCare's Zano D allows brands to formulate natural deodorants without aluminum, zirconium salts or baking soda.

Plant Defense for Skin Care

Activon's Activonol-LevaNA (INCI: fructan, propanediol, water) is a vegan, natural, biodegradable and China-compliant technology derived from levan (fructan), a fructose polymer produced by plants as a defense mechanism against cold and dry environments. Activonol-LevaNA imparts moisturizing and anti-inflammatory effects in skin care and reportedly strengthens the skin barrier by restoring the balance of the skin microbiome. The ingredient is recommended at a dosage of 2-5% in leave-on and wash-off applications.

Targeting Senescent Cells

Incospharm's DermAging corrector is a novel anti-wrinkle ingredient targeting aged cells in skin. The technology reportedly works by selectively removing senescent cells, one of the key instigators of skin aging. Clinical efficacy testing reportedly confirmed its anti-wrinkle efficacy after four and eight weeks of usage.

Sustainable Synergistic Surfactants

Lamberti Personal Care's Eucarol Easy MB comprises a synergic

blend of surfactants reportedly optimized to deliver performance, mildness and environmental safety. The blend is easy to formulate with, per the supplier, including easy water solubility and optimal foam and viscosity behavior. Critically, Eucarol Easy MB is gentle on the hair and skin, while delivering sustainable amino acid and glucoside chemistries.

Melon-derived Cellulite Fighter

Robertet's ingestible Dimpless reportedly targets the underlying causes of cellulite by restoring normal tissue fibrosis, increasing lipolysis and decreasing metabolic markers of weight disorders. The antioxidant technology was discovered in 1989 when French melon producers identified a new variety of cantaloupe (*Cucumis melo* L.) that showed a notably long shelf life. Dimpless is subjected to a coating technology to remain protected and bioactive in applications. It is available in an organic quality, per Robertet, and may have topical efficacy.

Ingestible clinical trials have reportedly found that Dimpless reduces subcutaneous fat by 25% on average after 90 days and accelerates the reduction in hip and waist measurements by 43% on average after 90 days. A trial conducted in 2016 reportedly showed a reduction in visible cellulite of 10% after 28 days and 12% after 56 days.

The effectiveness of Dimpless has also been demonstrated topically. A recent clinical study (not yet published) reportedly showed that a daily application of Dimpless for one month not only reduced cellulite significantly, but also re-densified the skin.

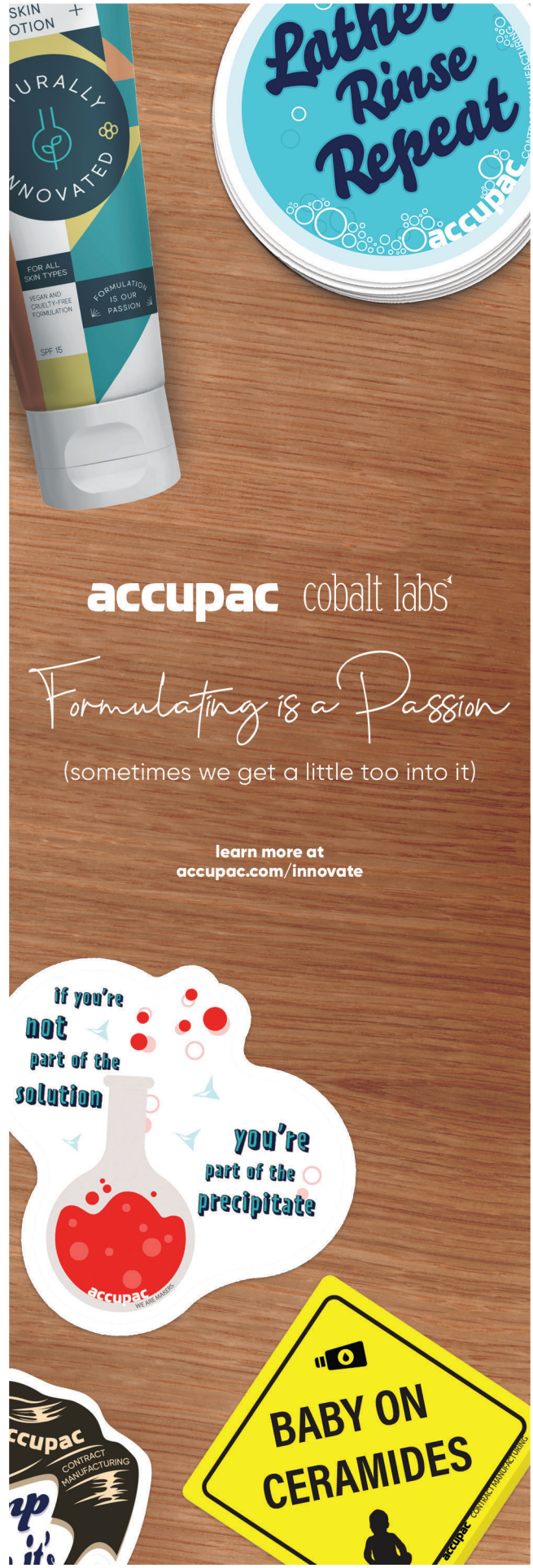
Ultrasonic Upcycling

Sonichem's low-energy ultrasonic extraction technology reportedly converts non-food agricultural and forestry woody biomass into green chemicals. According to the company, all the biomass that enters the ultrasonic process is upcycled with no co-products or impurities, leaving behind only a recyclable solvent. Sonichem's technology can thereby produce sustainable alternatives to conventional materials.

Global Cosmetic Industry spoke with Miranda Lindsay-Finn, commercial director at Sonichem, who discussed the potential applications of the products from this technique and how choosing bio-based materials can help manufacturers in the cosmetics industry reach their net zero goals.

Biomass sourcing

"Sonichem's proprietary ultrasonic technology is an ultra-clean way of converting low-value woody biomass into high-value green chemicals," Lindsay-Finn says. "We only use non-food materials in this process, which are by-products from the forestry and agricultural industry,





Ashland's new Phyteq raspberry technology is a nature-identical multifunctional preservative booster based on raspberry ketone.

and these resources would otherwise be burnt or left to rot. Our current feedstock is U.K.-grown softwood sawdust, waste material generated by our sawmill partner in Scotland."

Cosmetic ingredients produced via ultrasonic extraction

"We produce microcrystalline cellulose," says Lindsay-Finn, "a well-known cosmetic ingredient that can play a variety of roles in cosmetic formulations, for example as an emulsifier, a texturizer, an absorbent and a mattifying agent. Our lignin is extremely pure, and lignin itself is an aromatic polymer containing highly fragrant molecules such as vanillin, also known as [a component of] vanilla [flavors]. Lignin has antioxidant properties and innate UV resistance, making it an interesting biosourced SPF booster in formulations. Lastly, the sugars we produce are hygroscopic and the mixture is mainly composed of a sugar called mannose, which is known to be a good humectant and moisturizer.

Ultrasonic processing technique

"Central to Sonichem's unique process is the use of ultrasound, which, combined with mild organic acids, breaks apart the chemical bonds in the biomass feedstock through powerful physical forces called cavitation," says Lindsay-Finn. "This liberates the cellulose, sugars and lignin fractions. The fractionated mixture is then processed through recovery units to separate the fractions into high-quality biochemical products."

Sustainability benefits

"Our ultrasonic technology requires significantly less energy than conventional methods, and we also maximize carbon efficiency by turning more than 95 % of our feedstock into a valuable product," says Lindsay-Finn. "We use low-value woody biomass that would otherwise be burnt, which avoids releasing CO_2 into the environment. The capability to recover and reuse the organic solvents with negligible losses is additionally a significant carbon benefit. These gains all result in green chemicals with a low carbon footprint."

Commercial availability

"Sonichem is currently producing commercial samples from our pilot plant in the United Kingdom for market testing and collaborative R&D," says Lindsay-Finn. "Our first full-scale manufacturing plant in Scotland is on track to deliver market-ready products by 2025. We are now actively looking for partners within the cosmetics industry that would be interested in formulating novel cosmetics ingredients with our green biochemicals, and we invite any potential collaborators to get in touch."

Biodegradable & Silicone Alternatives

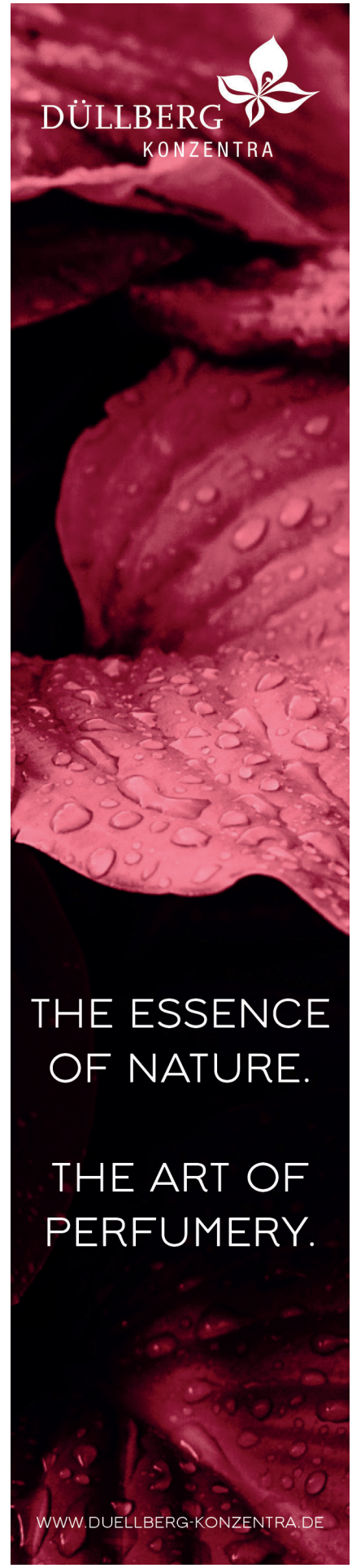
Lubrizol Life Science Beauty's (LLS Beauty) SilSense Bio 5 emollient (INCI: C9-12 alkane) is a biodegradable silicone alternative to D5 cyclopentasiloxane that reportedly provides the same performance and

sensory feel (lightweight, non-greasy) in leave-on applications such as skin care, hair care, hair color, sun care and makeup formulations. SilSense Bio 5 is a bioalkane chemistry derived from 100% vegetable oil. The emollient is COSMOS approved and vegan, halal and kosher compliant.

Per LLS Beauty, when used in hair care formulations, SilSense Bio 5 emollient offers softness and smoothness to the fiber in wet and dry applications. It provides volume and frizz control and has been shown to improve the scalp's condition through moisturization and improved barrier



Ashland's The Natural Line highlights naturals with easily recognizable INCI descriptions and defined compositions, including Puraloe aloe vera, which soothes and hydrates the skin.



function. It also helps maintain the pH of the skin of the scalp.

In skin care, sun care and makeup applications, SilSense Bio 5 reportedly provides formulations with a smooth and dry after feel alongside good pigment dispersion. Application of the ingredient diminishes the transfer of makeup, resulting in a reduction of color loss on the skin and almost no transfer of makeup to fabric, according to LLS Beauty.

Elsewhere, Berg+Schmidt's extended BergaCare FG range highlights natural silicone alternatives with high volatility and reportedly sophisticated sensory properties for skin care products.

BergaCare FG M 12 (INCI: coco caprylate/caprate (and) dodecane (and) *Citrullus lanatus* seed oil) contains Kalahari melon seed oil, which is rich in essential fatty acids and vitamin E and thereby imparts a light skin feel and improved skin elasticity. Its linoleic acid content, a precursor for ceramides, helps rebalance and moisturize the skin barrier, per the company.

Its BergaCare FG L 11, (INCI: undecane (and) tridecane (and) hydrogenated olive oil unsaponifiables (and) coco-caprylate/caprate), meanwhile, is a light and dry emollient blend that is said to make the skin feel soft and nourished.

COSMOS approval has been applied for both new BergaCare FG variants.

China-approved Peptide

DSM's Syn-Up skin care peptide has received approval as a new cosmetic ingredient (NCI) in China. To compare, between 2008 and 2020, eight NCIs were approved; four of these only received approval in December 2020. This latest announcement reportedly makes DSM the first company to receive NCI approval in the NCI category 3. To achieve the approval, DSM had to demonstrate that Syn-Up met five criteria over three years of use. The company is prepared to have more of its materials follow this path, thereby rendering them globally approved.



Robertet's Dimpless reportedly targets the underlying causes of cellulite by restoring normal tissue fibrosis, increasing lipolysis and decreasing metabolic markers of weight disorders.

Biotech Palm Oil Alternatives

Genetic engineering specialist Xylome has launched two sustainable drop-in replacements for refined, bleached and deodorized (RBD) palm oil: Yoil (INCI: *Lipomyces* oil extract) and Yoil-Cream (INCI: *Lipomyces* lipid bodies (and) citric acid (and) citrate (and) gluconolactone (and) glycerol (and) vitamin E acetate (and) sodium benzoate). The products are derived through the precision fermentation of yeast and can reportedly contribute to the minimization of deforestation related to palm production.

Yoil (yeast oil) is a white, solid fat at room temperature and a clear liquid at body temperature. According to the company, these characteristics are important criteria to replace the palm oil used in food, consumer goods, cosmetics and pharmaceuticals.

Yoil-Cream (or TopicOil, for OTC) is composed of purified lipid bodies that naturally assemble during the yeast fermentation process. The single-ingredient, aqueous-feeling moisturizer forms without emulsifying agents, yet the lipid bodies contain approximately 87% Yoil internally, Xylome reports.

The cream is said to be stable upon repeated steam sterilization and potentially useful for the loading of hydrophobic active ingredients. According to the company, since the lipid bodies are approximately 100x larger than the size of commercial hydrophobic liposomes, the volume/surface ratio enhances the potential to deliver high concentrations of hydrophobic active ingredients.

Saffron-driven Care for Gums

Ashland's Saffragyl biofunctional, derived from upcycled saffron flowers, reportedly prevents early gum problems and strengthens sensitive and irritated gums. The technology reportedly acts as an alternative to chlorhexidine, which can be an irritant. Microbiome-friendly Saffragyl treats

gingival inflammation and plaque build-up, per Ashland, and supports gums prone to gingivitis.

Saffragyl neutralizes the gingipain toxin, which is produced by the bucco-dental bacteria *Porphyrhomonas gingivalis*. The toxin is responsible for gingival inflammation, gum tissue degradation, biofilm formation and other serious health disorders if not counteracted, per Ashland.

The water-soluble material can be formulated at 1% in leave-on gels, serums, mouthwash and toothpaste. It is not an antibacterial and has reportedly been proven in vitro to respect the gingival microbiome. In vivo volunteers purportedly felt an improvement of their gingival health when using the biofunctional. They perceived more soothed, less sensitive gums and, visually, less dental plaque.

"Oral health (gum and teeth) is connected to overall health and well-being," says Christophe Capallere, senior team leader, tissue engineering, toxicology in vitro and evaluation, Ashland. "Recent research has demonstrated the link between oral bacteria with age-related health disorders that go beyond gingival recession such as Alzheimer's and cardiac problems. Knowing that 90% of the global population is suffering from gingival inflammation (gingivitis), taking care of gum health in a prevention mode should be considered as the number one strategy in our daily healthy beauty routine." ■



Lubrizol Life Science Beauty's (LLS Beauty) SilSense Bio 5 emollient is a biodegradable silicone alternative to D5 cyclopentasiloxane.



Packaging Innovation Tracker: Refillables Ready for Growth

Growing consumer interest has intersected with new supplier offerings.



"Refillable lipstick" Google searches grew 29% year-over-year in 2022.

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As refillable packaging for beauty expands from natural and clean brands to the general market, and from skin care to hair care, makeup, body care and beyond, Kline Group has identified opportunities to accelerate the trend[a]. The firm notes that professional hair and skin care brands are underleveraging refillable formats, a missed opportunity to capture conscious consumers.

A recent analysis[b] by Beauty Pie echoes these findings. The brand reported that among the search terms that experience the largest increase in Google search volume in 2022 were "refillable skin care" (up 42% year-over-year) and "refillable lipstick" (up 29% year-over-year).

Packaging and contract manufacturing partners for beauty and personal care have ramped up their innovations to meet rising interest in refillable concepts. For instance, the U.S. division of Japan-based Tokiwa now offers refillable wooden pencils, liquid liners, eyeliners, brow pencils and lipsticks. The products are FDC CoC certified and RSPO supply chain certified,



Quadpack has introduced the Light Me Up airless refillable flow pen, featuring four sensorial, cold-touch tips that provide users a soothing experience and precise application without compromising the formula.

per the company, which offers PCR and ocean plastic. Tokiwa also offers eyebrow pencils; eyeshadows and eyeshadow sticks, lip liners and glosses; foundation, palette, card and multi-color compacts; and multi-colored powders.

"On the forefront of technology, our New Jersey innovation lab offers custom manufacturing for customers to develop turnkey finished products with exceptional service," says Dana DiSomma, Tokiwa's director of sales and business development. "We are excited to offer that to our customers as the demand for customization and personalization in the cosmetics industry continues to boom."

Elsewhere Quadpack has introduced the Light Me Up airless refillable flow pen, featuring four sensorial, cold-touch tips that provide users

(Continued on Page 42)

[a]https://klinegroup.com/articles/five-beauty-and-wellbeing-trends-that-will-define-2023/

[b]www.beautypie.com/blog/posts/trends-report-2023



Tokiwa now offers refillable wooden pencils, liquid liners, eyeliners, brow pencils and lipsticks.

MULTIDIMENSIONAL SUSTAINABILITY

From airless formats to lightweighted design to increased PCR, packaging suppliers are driving new innovation for personal care and beauty.

For instance, Italy-based Lumson's APP (airless plastic packaging) 355 Light is a new 50 ml PCR PE airless with pouch system that is 25% lighter than the equivalent standard APP 355 due to a reduction in the bottle's thickness. In addition, the multi-layered pouch acts as a barrier against contaminants, thereby protecting formulas.

The new design comprises 80% PCR HDPE and 20% HDPE. Per a SPICE analysis, CO_2 emissions generated during manufacturing of the APP 355 Light are 19% lower compared to the APP Start PE airless system.

The APP 355 Light bottle can be paired with the Lumson AA355 pump in PCR PP, which allows for the recycling of each plastic component, per Lumson.

"The new APP 355 Light incarnates all of Lumson's technical and technological expertise and is a solution that is keeping up with the times," said Matteo Moretti, president of Lumson. "Not only is it a winning choice in terms of safety and sustainability, but it's also extremely versatile because, like all of our airless packaging, it can be customized with various effects and decorations."

Meanwhile, Aptar Beauty has added two aerosol actuators and a fine mist spray that are now qualified in up to 46% PCR resin. The EuroMist technology, reportedly a best-seller in North America, is available in up to 33% PCR between the fixture, actuator and over cap.

The fine mist spray is suitable for a range of formulas. Its variety of inserts also allows brands to choose a desired spray output that matches the application need.

The Moritz and Markus aerosol actuators feature a hoodless, integrated twist to lock functionality, eliminating the need for an over cap. The two-piece design provides a 50% resin savings for Moritz and 53% resin savings for Markus.

The Moritz aerosol actuator is available in up to 40% PCR ; the actuator cover is 100% PCR. The actuator is suitable for a range of applications. The fine-ribbed profile and wide finger pad are designed for ergonomic ease of use.

The Markus actuator is available in up to 46% PCR; the actuator cover is 100% PCR.

The Markus features a premium matte finish and textured finger pad. The softer ribs provide a tactile grip when in use, per Aptar Beauty. The aerosol actuators and fine mist spray are production-ready in North America, per the company.

The designs are in line with Aptar Beauty's aim to have 10% of its packaging comprise recycled material by 2025.

"We continue to focus on our strategic priority of embedding sustainable product attributes as part of standardized practice here at Aptar, as we believe firmly in our commitments toward a more circular economy," said Laura Estebanez, president, Aptar Beauty, North America. "By broadening our PCR conversion into our spray portfolio we are able to help our brand partners achieve their aligned goals." ■



Lumson's APP (airless plastic packaging) 355 Light is a new 50 ml PCR PE airless with pouch system that is 25% lighter than the equivalent standard APP 355.



Moritz's two-piece design provides a 50% resin savings.



The Markus actuator is available in up to 46% PCR; the actuator cover is 100% PCR.



The EuroMist technology, reportedly a bestseller in North America, is available in up to 33% PCR between the fixture, actuator and over cap.

PACKAGING-BRAND PARTNERSHIPS

Seacliff Beauty has developed a teardrop-shaped glass bottle in 50 ml and 100 ml with PP cap for Stripes, a menopause wellness brand headed by Naomi Watts and Amyris. The packaging is decorated in custom color and customer artwork. The design features a dip tube pump for easy usage, dispensing the ideal amount of product without any mess. The bottle, closure and decoration were all done by Seacliff Beauty.

Seacliff also developed a customized stock airless pump jar for Vella's Women's Pleasure Serum. The jar imparts an ideal amount of product without any excess or mess, per Seacliff. The jar, closure and decoration were all done by Seacliff Beauty.

Aptar Beauty's Future mono-material pump has nabbed WorldStar (packaging materials and components category) and PCD (premium skin care category) awards in collaboration with Dermalogica's new cleansing line. Future's design eschews metal components and comprises only polyethylene (PE), in particular the engine, easing recyclability. It is also available using post-consumer resin (PCR).

Future is e-commerce capable and ISTA 6 compliant, per Aptar, due to the design's incorporated locking/unlocking ring and 360-degree, free-spinning actuator, which is said to minimize potential breakage in transit.

Dermalogica was the first prestige skin care brand to launch its cleansing line, comprising the Special Cleansing Gel, UltraCalming Cleanser and Clearing Skin Wash, using the Future pump. The PE pump, combined with Dermalogica's 50% PCR bottle, reportedly reduces reliance on virgin plastic and eases recyclability. ■



Aptar Beauty's Future mono-material pump has nabbed WorldStar (packaging materials and components category) and PCD (premium skin care category) awards in collaboration with Dermalogica's new cleansing line.



Seacliff Beauty has developed a teardrop-shaped glass bottle in 50 ml and 100 ml with PP cap for Stripes, a menopause wellness brand headed by Naomi Watts and Amyris.



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Quadpack's refillable Idol Woodacity Solo Twist Compact can be comfortably opened by both right and left-handed consumers with a quarter turn of the cap in any direction.

(Continued from Page 39)

a soothing experience and precise application without compromising the formula. The four sensorial cold tips create a personalized experience: brands can either launch a collection or choose the tip that best matches their formula. The 6.6 ml pen is reportedly ideal for liquid and low-viscosity formulations, making it applicable to makeup and skin care.

The inner bottle can be easily removed for recycling, per Quadpack, and replaced with a simple turn. The refill is made of PP and the full pack is available in up to 30% PCR. The lifecycle assessment of Light Me Up shows that the product's CO_2 emissions reduce by 50% in the refillable version when compared to a non-refillable flow pen, while its circularity index shows a five-fold improvement, per Quadpack data.

Quadpack offers another refillable format, the Idol Woodacity Solo Twist Compact, which can be comfortably opened by both right and left-handed consumers with a quarter turn of the cap in any direction.

The soft-edged, domed casing comprises 100% wood from European sustainably managed forests (PEFC or FSC), per the supplier. The cap features an embedded mirror; because the compact's top and base are discrete parts, the cap can be used as a pocket mirror.

The compact can house a flat, refillable, metallic 59 mm godet, held in place by a small dismantlable magnet in the base, which reportedly eases the separation of components for recycling. A recess in the base allows the godet to be easily extracted by hand and replaced with a filled version.

As shopper interest and market dynamics continue to drive interest in refillables, expect to see more innovations surface. ■



The State of Beauty: 2023-2025



Looking ahead, NPD is forecasting prestige beauty dollar sales through 2025 will remain elevated versus pre-pandemic levels, though results will vary widely by category.

Beauty had an undeniably strong 2022 across mass and prestige but enters the new year in an environment of uncertainty.

The good news, according to Larissa Jensen, vice president, beauty industry adviser, The NPD Group, among beauty buyers who are reducing overall spend due to inflation, 70% are *not* cutting back their spend in beauty.

Jensen's comments came during CEW's annual state-of-the-industry event, featuring insights from NPD/IRI[a], Spate[b], Google, NielsenIQ[c] and Mintel[d].

[a]*www.npd.com*
[b]*www.spate.nyc*
[c]*https://nielseniq.com/global/en/*
[d]*www.mintel.com/industries/beauty-and-personal-care/*

Here, we review what 2022 tells us about the next three years in beauty, as well as the many nuances across categories and pricing tiers.

2022 Beauty Sales Breakdown

U.S. prestige beauty sales revenue for 2022 grew by 15% year-over-year, totaling $27.1 billion, according to new NPD data, while IRI/NPD data shows that 2022 mass beauty sales totaled $66 billion.

The U.S. XAOC (extended all outlet combined) health and beauty sector—comprising food/grocery, drug, mass merchandisers, club stores, dollar stores and military DECA (commissaries)—generated 2022 full-year sales of $111,254,478,883, according to NielsenIQ, a rise of 5.3% from the $105,678,193,385 generated in full-year 2021.

Combined, the mass and prestige beauty product market revenue growth for 2022 was 11%, per NPD. Yet only prestige unit demand remained strong.

According to NielsenIQ, XAOC unit sales dropped 3.5% in 2022. At the same time, average unit prices in the mass sector climbed 9.1%.

NPD concurs: mass price increases were overwhelmingly responsible for sales gains. Per NPD, mass brands increased prices 4-7 points higher than average prestige price increases.

During the U.S. holiday season, prestige growth was much faster than

mass in last eight weeks of the period.

The strongest regional growth performance in 2022 across mass and prestige came from Latin America.

Looking ahead, NPD is forecasting prestige beauty dollar sales through 2025 will remain elevated versus pre-pandemic levels, though results will vary widely by category.

Makeup/Color 2022: Strong Comeback

U.S. prestige makeup sales increased 18% in 2022, comprising the most sales revenue gains of all the prestige beauty categories. In addition, aside from skin care, makeup was the only category to grow mass unit sales.

The fastest growing sector was lip products, with sales surpassing pre-pandemic 2019 levels by double-digits. Lip gloss outperformed lipstick, compared to both 2021 and 2019.

On the mass/XAOC side of the equation, U.S. sales of cosmetics and nail grooming products increased 5.6% in 2022, totaling $8,912,002,760.

The category's big gainer was cosmetic appliances, per NielsenIQ, which jumped 64.5% year-over-year to $9,406,521, while nail kits/sets increased 17.8%. Cosmetics and nail grooming combination pack sales increased 16.9%.

Makeup Search Trends

Online searches for makeup are growing quickly, according to Yarden Horwitz, co-founder of Spate, and Flynn Matthews, head of insights and measurement, global CPG, Google.

Makeup brands with biggest search volume include Fenty, Charlotte Tilbury, Rare Beauty, e.l.f. Beauty and Nars, while top up-and-coming percentage gainers included Half Magic, Lash Therapy Australia, Pley Beauty and Jones Road.

Looking ahead, Spate and Google data unearthed a desire for low-maintenance/easy products such as tubing mascara, cheek and lip stains, and eyeliner stamps.



U.S. prestige skin care sales grew 12% in 2022. Body products grew at more than three times the rate of facial products.

At the same time, a desire for self-expression is creating demand for bold looks that require body glitter, hair tinsel, rhinestones for the face, grunge makeup and crying makeup looks, and even tooth gems. This impulse is driven less by traditional beauty than a desire for individuality and iconic looks.

Skin Care 2022: Mass & Natural Rising

U.S. prestige skin care sales grew 12% in 2022. Body products grew at more than three times the rate of facial products. Skin care was one of two mass categories to grow units in 2022. Meanwhile, sun care mass sales dropped in favor of prestige products, signaling that consumers may be trading up.

On the mass/XAOC side of the equation, hand and body lotion sales increased 8.2% in 2022, while eczema and psoriasis treatments jumped 21.6%.

According to NPD, natural brands are making a comeback in prestige skin care after pandemic-era gains for clinical brands. That said, mass natural brands declined, creating opportunities for nimble innovators.

Despite the resurgence of natural brands, 39% of U.S. skin care consumers feel it's important for skin

care products to be recommended by a doctor or dermatologist, according to Sarah Jindal, senior director, beauty and personal care, Americas, Mintel.

That doesn't necessarily require a dichotomy between natural and efficacy. Jindal notes that 20% of U.S. consumers recognize lab grown nature identical ingredients as effective, while 22% recognize these materials as safe.

On the mass/XAOC side, NielsenIQ reported that facial skin care sales rose 5.8% in 2022 to $4,555,884,624.

Top gainers included facial treatments, up 34.7%,

Losers included facial skin appliances, which fell 30.6% and facial toners, which dropped 18.8%

The standalone mass/XAOC sun care sector totaled $1,663,022,313, representing a 6.7% gain versus 2021.



There is growing interest among younger consumers in aesthetic procedures, as well as in products offering effects similar to these procedures.

Skin Care Search Trends

Unlike makeup and fragrance, online skin care searches are decelerating, per Spate and Google data. That said, searches favored bronzing and dewy effects, while tretinoin and glycolic acid enjoyed the largest increases in average monthly search volume among ingredients.

The most searched skin care brands included Tatcha, Drunk Elephant, La Roche Posay, Elta MD and Good Molecules, displaying strong interest in established brands. At the same time, the top-year-over percentage gainers included Byoma, Naked & Thriving, Beauty of Joseon, Vibriance and Cay Skin.



U.S. prestige fragrance sales increased 11% in 2022, driven by higher fragrance concentrations such as eau de parfums and parfums, and higher-end artisanal fragrance juices.

Looking ahead, Spate and Google data pointed to a desire for low-maintenance/multifunctional products such as tinted sunscreens.

Aesthetic-influenced Beauty

In their presentation, Horwitz and Matthews identified growing interest in aesthetic procedures, as well as in products offering effects similar to these procedures.

Notably, even younger consumers are seeking these benefits, often with a desire for a chiseled, mature or so-called "dissolved" look that contrasts strongly with the filler-obsessed, baby-faced looks of the past.

Key search trends in the sector included nano needling, Sciton's Moxi laser, Morpheus 8 microneedling, red light therapy, skin barrier care, ponytail facelifts and carbon laser peels. Other procedures include micro Botox, buccal fat removal, cheek filler and Botox brow lifts.

Horwitz and Matthews noted that recessionary/inflationary pressures could impact young users' adoption of medspa procedures. However, this could be a boon for products offering similar effects. To that end, the trend has highlighted science-backed skin

care ingredients, including tretinoin, retinol, salicylic and glycolic acids, ceramides, glycerin, hyaluronic acid, and snail mucin.

Fragrance 2022: Highly Elastic

U.S. prestige fragrance sales increased 11% in 2022, driven by higher fragrance concentrations such as eau de parfums and parfums, and higher-end artisanal fragrance juices.

The category is among the most "elastic" in beauty; even as prices increase, sales remain consistent. Perhaps for this reason, prestige fragrance comprises about 60% of full-category volume.

Mass/XAOC fragrance sales increased 1.2% to $992,761,833 in 2022. Fragrance gift set sales increased 21.2% in the period.

However, body powder fragrance sales dropped nearly 27%, while fragrance combination packs fell 35.4%.

Fragrance Search Trends

Online fragrance searches are growing robustly, per Google/Spate data, reflecting high engagement in the category. The most searched fragrance brands included Carolina Herrera, Valentino Beauty, Burberry, Scentbird and Versace, while the brands with the highest search percentage growth included Vilhelm Parfumerie, World of Chris Collins, Dedcool, Tiziana Terenzi and Henry Rose.



The standalone oral hygiene and vitamin/supplement sectors grew 3.3% and declined 1.3%, respectively, in 2022.



U.S. prestige hair product sales grew 22% in 2022, driven by masks and targeted treatments.

Hair Care 2022: Wellness-centric

U.S. prestige hair product sales grew 22% in 2022, driven by masks and targeted treatments. NielsenIQ data for mass/XAOC shows that hair care sales rose 3.3% in 2022 to $11,862,651,221. According to NPD, mass represents 80% of sales across combined categories.

Top mass/XAOC gainers included styling product combos, up 15.7%, and shampoo and conditioner combos, up 13.4%. Top decliners included hair costume color, down 64%, and 3-in-1 products, down 13.7%. The standalone hair removal sector totaled $3,258,036,381, representing a 3.3% gain.

According to a Google/Spate analysis, rosemary was the top-growing hair ingredient search term.

The most-searched hair brands in 2022 included Dyson, Drybar, Mielle Organics, K18 and Nutrafol, while top up-and-coming percentage gainers included Divi, JVN, Owa (despite being renamed Susteau), Shark and Arey Grey.

Looking ahead, Google and Spate data pointed to an embrace of low-maintenance hair, favoring root perms and wolf cuts.

Body & Bath Care: Post-pandemic Trends Win

Bath and shower mass/XAOC sales grew 3% year-over-year to $7,520,327,591, per NielsenIQ.

Bath and shower gift sets/kits grew more than 86% year-over-year, totaling $20,362,780, while exfoliators/scrubs grew 36.5% to $266,320,534.

Top decliners included bath and shower wipes, which dropped 34.6% to 48,750,736, and pandemic favorites hand sanitizers, which dropped more than 38% to $412,190,196.

The standalone oral hygiene and vitamin/supplement sectors grew 3.3% and declined 1.3%, respectively.



Consumers making at least $100K/year spent more than double on beauty in 2022 than they did pre-pandemic.

The State of Beauty Retail

In prestige beauty, 2022 year-over-year brick-and-mortar retail share grew, while online sales share increased in the mass market.

Brick-and-mortar units were down in 2022, driven by mass market declines, while prestige in-store sales actually grew. In fact, prestige sales are dominated by brick-and-mortar channels while mass sales in the channels are falling.

Meanwhile, multi-brand ecommerce grew shopper frequency more than any channel in prestige beauty, while dollar stores experienced the largest drop in the mass sector.

NPD data shows that number of products sold on promotion in prestige beauty has fallen below pre-pandemic levels—with no harm to industry sales.



The U.S. mass beauty shopper is shopping less often, driving unit sales declines.

The State of the Beauty Shopper: Mass, Prestige & Luxury

The U.S. mass beauty consumer is shopping less often, driving unit sales declines, according to NPD's Jensen. These shoppers represent a diverse mix, with growth demographics including upper income shoppers and Asian Americans.

Meanwhile, prestige sector growth is being driven by consumers making at least $100K/year. In 2022, these consumers spent more than double on beauty than they did pre-pandemic. In fact, the key prestige beauty shopper spends 12x more than average prestige beauty shopper.

While the divide between the mass and prestige sectors is notable, Tara James Taylor, SVP global beauty vertical leader, NielsenIQ, stressed that beauty consumers are shopping across pricepoints and offline and online channels. This trend is highlighted by Ulta Beauty's new store layouts, which freely mix prestige and mass products. ■

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