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MAY 2023

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A Peek Into Beauty's Future



Beauty is back. Yes, the sector's finished product sales have been incredibly resilient over the last three pandemic-inflected years. But something was missing: in-person industry events. Maskless discussions. Dinners with clients and colleagues. Fun.

Having just returned from an incredibly busy in-cosmetics Global in Barcelona and having witnessed the triumphs of MakeUp in/Luxe Pack LA and Cosmoprof Bologna, it's clear that the industry has returned to pre-pandemic form.

In Barcelona I consumed my weight in fresh seafood and *pan con tomate* but I also walked miles and miles of exhibition floor to experience this year's showcase of more than 2,800 beauty and personal care ingredients.

What my colleagues and I discovered comprises so many materials and trends that we've spread our coverage out across our March, April, May (**page 34**), June and July/August 2023 issues[a]. While you can enjoy our ingredient trend series for yourself, I will share a number of top trends you can expect to see:

- Algae tech: vegan waxes, film formers, retinol alternatives, facial contouring actives and more
- Neurocosmetics designed to soothe reddened, stressed skin, while also providing an emotional benefit
- Ubiquitous upcycling, from fruit processing by-products to converted forestry materials
- Senescence-hacking ingredients that tap autophagy to remove "zombie" cells or outright prevent cells from becoming senescent
- Fermented ingredients promising everything from gentle peels to retinol alternatives
- Programs or ingredients designed to decarbonize the beauty palette and supply chain
- Ingredients designed to mimic aesthetic procedures, without the risks/costs
- A boom in scalp care claims

I look forward to bringing these trends to you and to hopefully running into you at your next industry trade show or conference. See you soon!

[a]*Read current, past and upcoming issues at* www.gcimagazine.com/magazine



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- LipoTrue
- Lumson Cosmetic Packaging Industries
- Sharon Personal Care
- TRI-K Industries

Consumers are seeking beauty products that fulfill a variety of natural, multifunctional needs.

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INSIDER INSIGHTS:
SKIN CARE INGREDIENTS & PACKAGING + BATH & BODY CARE INGREDIENTS

The global beauty space continues to see innovations sparking from recent trends.



Global Cosmetic Industry spoke with beauty insiders to highlight recent skin care and bath and body trends, as well as launches in these spaces for ingredients and packaging.

Fermented Active Ingredients

Miriam Mateu, product management at LipoTrue, says, "We saw a lot of innovation in the fermented active ingredients industry at the latest edition of the in-cosmetics Global in Barcelona. The fermentation procedure allows to produce exclusive active components with high efficacy and wide range of applications in a very sustainable manner, since it does not require extraction from wild resources and does not affect the ecosystem."

Mateu continues, "We have just launched V/WA, a fully vertically integrated active ingredient, obtained from the fermentation of a newly identified *Alteromonas* species: *Alteromonas lipotrueae*. It acts on neuritogenesis and neuronal migration, synaptic vesicle recycling, and muscular contraction to relax expression wrinkles. V/WA instantly smoothes crow's feet and forehead wrinkles, as well as those difficult hidden creases exposed when smiling or frowning. We have also launched Poptide, a cyclic peptide that improves protein folding in the endoplasmic reticulum and the fluctuation of wrinkles (what we call the wrinkle's daily cycle), which are more pronounced in the evening due to gravity and facial expressions."

Skin's Holobiont

Romain Francolon, marketing director, Greentech, says, "Today, we have a holistic approach to skin care by studying the interactions between the host and the microbiota: the holobiont. This new approach is made possible by a new technology: metaproteomic analysis. By studying the protein interactions between the skin and its microbiota, it is possible to observe the biochemical impact of an active ingredient on the skin's metabolism. With Holobiosys, Greentech R&D goes a step further by studying the skin holobiont. Holobiosys is a COSMOS-certified organic upcycled active ingredient, a wild yellow gentian roots extract enhanced by an advanced fermentation process with a rare and cold-tolerant bacteria from aerobiota. It restructures skin from surface to its heart, boosts hyaluronic acid and lipids synthesis and restores skin hydration

with smoothing effects, while invigorating the skin holobiont. For a deeply moisturized and plumped skin."

Skin Microbiome

Melisa DeGroot, Ph.D., technical writer for Biocogent, says, "Microbiome-modulating ingredients are becoming increasingly popular (and effective) as scientific research reveals the various roles of skin-dwelling microorganisms. As we learn more about the skin microbiome, active ingredients are being developed to strategically balance skin resident microbes to support skin that feels and looks healthy."

DeGroot continues, "The first ingredient of its kind, DermaPhage CA is a fast-acting bacteriophage cocktail targeting *Cutibacterium acnes* (formerly known as *Propionibacterium acnes*), a microbial culprit of blemish flare-ups and skin inflammation. DermaPhage CA is clinically proven to improve the skin by reducing sebum and C. acnes-associated coproporphyrin III levels on the face without disrupting other skin microbes. The three unique bacteriophages in DermaPhage CA demonstrate optimum safety and efficacy for use in facial and body care products and sprayable formulas for linens or laundry detergents and additives to diminish the growth of *C. acnes*. The bacteria associated with blemished, irritated skin can also be kept in check with Grandiciin, a natural *Epimedium sagittatum* extract that reduces the burden of *C. acnes* biofilms. The microbiome-modulating effects of Grandiciin are clinically proven to rapidly reduce the appearance of blemishes and redness in just two weeks."

Lab Grown Alternatives

Luciana Uttembergue D'Elia, senior technical and marketing manager, DSM Personal Care, says, "Lab grown alternatives will play a key role to attend consumer demand for natural, high performance and sustainable solutions. According to Mintel, 20% of consumers recognize lab-grown, nature-identical ingredients as effective; safe (22%) and trendy (21%). DSM offers a lab grown algae, Pepha Tight CB, cultivated in photobioreactors to maximize the respect of the environmental biodiversity while ensuring optimal growing conditions and results in exceptionally pure algae, rich in active substances and of high quality due to minimum contamination risk. It has proven efficacy in delivering both a fast, instant tightening experience and superior long-term skin firming effect."

Upcycling

Brian Grady, senior marketing specialist, DSM Personal Care, says, "Consumers have taken a great interest in brands that utilize upcycling, the transformation of by-products and waste materials into a completely new product. Upcycling demonstrates a commitment to sustainability by using materials that would otherwise be discarded. According to Mintel, global launches of beauty products including the term upcycled in the product description have increased by 732% since 2020."

Grady continues, "DSM offers Stimu-Tex AS, a 100% natural upcycled beauty solution created from a unique mixture of high-quality spent grain wax, cold pressed argan oil and shea butter. It provides effective relief to sensitive and irritated skin within five minutes. Stimu-Tex AS visibly reduces histamine-related symptoms such as irritation and itching, delivering a liberating feeling of ultimate skin comfort. Spent grain has long been identified as a substance that can soothe skin and relieve itching. Brewers' spent grain is the most abundant by-product generated from the beer-brewing process, representing roughly 85% of the total by-products generated. DSM obtains spent grain wax through a high-tech extraction process using supercritical CO_2." ■



BATH AND BODY CARE INGREDIENT TRENDS

Consumers have focused on the overall skin health in body care products.

Skin Health

Sabrina Behnke, senior manager business development, modern preservatives at Tri-K Industries, says, "The desire for healthy, hydrated, and smooth skin is no longer limited to the face and neck. Today's consumers look for beauty benefits in their body care products as well. However, they also want to take care of their sensitive skin and do not want to disturb their skin microbiome. Beauty should not come at the expense of skin health. That is why more and more ingredients popular in face and neck care have entered the body care space. Common skin concerns such as loss of firmness, hyperpigmentation and ingrown hairs can be addressed with skin care actives that are well known from face and neck care."

Behnke continues, "Our new product Galguard Lipo G (INCI: capryloyl glycine, undecylenoyl glycine) is a great example of a skin care active that also acts as a multifunctional ingredient which helps with preservation. Galguard Lipo G acts as a sebum regulator (via 5 alpha-reductase activity) and is a well-known face care ingredient that fights blemishes and impurities. Lipidated glycines (such as Galguard Lipo G) often find use in microbiome-friendly products which can be attributed to their ability to restore the skin's pH back to a healthy level. This makes the ingredient a perfect skin health ingredient for sensitive skin and baby products. It is well suited for rinse-off, leave-on and wipes formulations."

Sustainability & Multifunctional

Stefania Caporaso, marketing manager, Sharon Personal Care, says, "Save the energy is a must nowadays. Cosmetic companies are increasingly addressing themselves on sustainable and multifunctional solutions. Sharon Personal Care creates Emulpharma Mimesis, an innovative ingredient able to work as an emulsifier, for a smoothed and comfortable second skin feel, but also as a carrier, driving active ingredients with appropriate molecular size into the deepest layers. Used for the formulations of baby milk, sprayable body lotion, body cream, the result is an exceptional light touch and silky after-feel." ■

SUSTAINABLE SKIN

Sustainability remains the cornerstone of beauty.

Sarah Chen, marketing and communications manager, International Cosmetic Suppliers (ICS), says, "At ICS, we are seeing the trend continue to grow for multifunctional formulations and waterless skin care formulations paired with sustainable glass or metal-free packaging. Glass is fully recyclable, versatile and compatible with volatile ingredients. Likewise, metal-free packaging is another 100% recyclable, popular option. We are also seeing a significant demand for skin care packaging that incorporates sustainable elements such as upping PCR content, opting for Ocean Plastic, and modifying existing packaging into mono material, recyclable options."

Chen continues, "ICS is excited to offer our newest innovation: our patented, 100% recyclable plastic lotion pump which can include PP PCR. The in-mold matte pump has a 24/410 neck size, convenient on/off lock function, and 0.2 cc dosage. Fully recyclable, it is a great option for lotions, serums, body washes, primers, and gels. ICS partnered with True Botanicals to develop sustainable packaging for their first-of-its-kind mineral Skin Barrier Sun Shield with SPF 30 in 50 ml and Everyday Skin Tint with SPF 30 in 30 ml. The component range is made with recyclable glass bottles paired with PP PCR incorporated into the cap and collars. True Botanicals is on a mission to deliver clean and sustainable products that can make a difference for your skin and for the planet, a mission ICS wholeheartedly supports."

Melissa Niebes, president and chief commercial officer, Federal Package, says, "Consumers don't want waste in their packaging, including the actual product itself. Along with sustainable, eco-friendly materials, we have seen a rise in dispensing systems that ensure near or 100% evacuation of the product. This also enables containers to be cleaned more easily which raises the likelihood of recycling at the end of life of the product. Waterless beauty is another trend we thought could be subsiding, but in the last month we've received three requests for shampoo and conditioner bars. Waterless soap bars saw a 7.1% increase and waterless shampoo bars a 5.3% increase year over year according to Spins, a wellness-focused data company."



International Cosmetic Suppliers partnered with True Botanicals to develop packaging for its Skin Barrier Sun Shield SPF 30 in 50 ml.

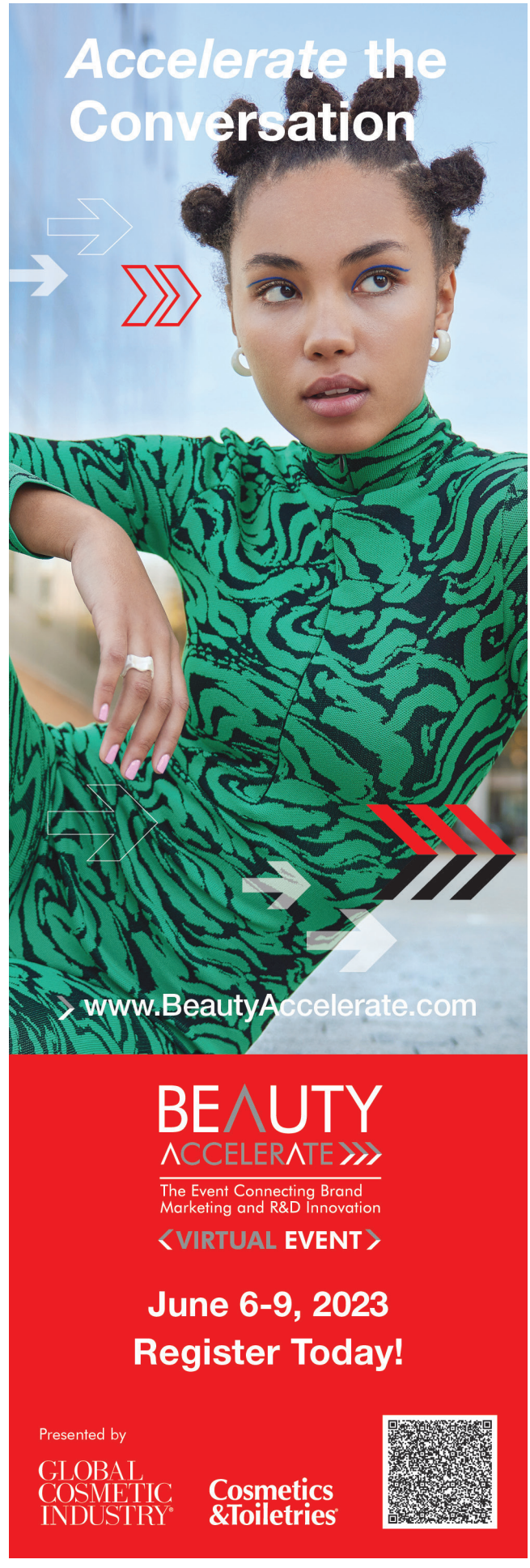
Niebes continues, "We have been in a constant testing mode over the last couple of years on sustainable materials from post recycled consumer (PCR), post recycled industrial (PIR) and bio-resin sources. We're currently in the process of testing a new PCR polypropylene that is FDA compliant. The recycling process starts with a traditional mechanical recycling process, but then goes through a chemical purification to remove any additives like slip or colorant. This takes the polypropylene back to its original form and is something our customers are excited about as it enables them to execute against their sustainability PCR commitments, as well as color match to any color target or Pantone within their brand portfolios."



Lumson Cosmetic Packaging Industries' Eco Dropper features components that allow for it to all be recycled.

Silvia Losacco, events and communication specialist, Lumson Cosmetic Packaging Industries, says, "Among the main trends of our sector sustainability plays a key role. All the players of the beauty industry, from raw material suppliers to brands, are increasingly more oriented to greater transparency with regards to sustainability. This is demonstrated by the concrete actions and tools developed to help companies, and consumers make more informed 'green' choices (tools, for example, that try to shed light on many gray areas, providing information on packaging recyclability, logistics, the supply chain, and ingredient sourcing practices). On the packaging side, rechargeable and zero waste solutions are one of the major players demonstrating that the 3 Rs (reduce, reuse, recycle) remain a main challenge for companies. If the consumers are increasingly more oriented towards those brands that make sustainability a priority (without greenwashing), on the other hand all the players must give concrete answers and re-think products in a more sustainable way."

Losacco continues, "App Light in PCR PE, an airless system available in 15-30-50 ml format, has been created without skimping on technical functions, aesthetics, and protection of the product. APP 355 Light is 25% lighter than the equivalent standard APP 355 thanks to a reduction in the bottle's thickness and made even more sustainable thanks to the materials it is made of (80% PCR HDPE + 20% HDPE). The improvements also apply to CO_2 emissions. From a SPICE analysis, results showed that CO_2 emissions generated during manufacturing of the App 355 Light are 19% lower when compared with App Start (another one of Lumson's airless in PE). After the success achieved with Re Place—the rechargeable glass jars, Lumson has recently increased its portfolio with two new refillable jars Japa in a 15 ml and 50 ml format. A new monomaterial dropper, Eco Dropper, joins the latest products introduced by Lumson. This new environmentally friendly dropper even though [it] is made of just one material to facilitate recycling once the product has been used up, maintains the same performance and is as easy to use as traditional droppers. The collar and pipette are made of PP while the bulb is polyolefin, a particular elastomer compatible with PP recycling methods. It is a solution that simplifies recycling because once the product is finished, all of the components can be disposed of into the same recycling chain. For packaging that is 100% sustainable, Eco Dropper can be paired with PCR glass bottles. Confirming the sustainability of this new product is a SPICE analysis where a comparison between the mono-material dropper and a standard dropper with a TPE bulb, collar in UREA, and glass pipette showed that CO_2 emissions are reduced by 29% for the monomaterial version while the aggregate score was equal to -39%." ■



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Baths, Showers & Beauty: Consumers Tell All

BY DENISE HERICH and JENNIFER STANSBURY, The Benchmarking Company



Ninety-three percent of women who bathe in a bathtub do so to relax, 83% do so to pamper themselves, 67% do so for alone-time (make that 77% if she has one or more children under 18 years old in her household) and only 31% saying they bathe in a tub to get clean.

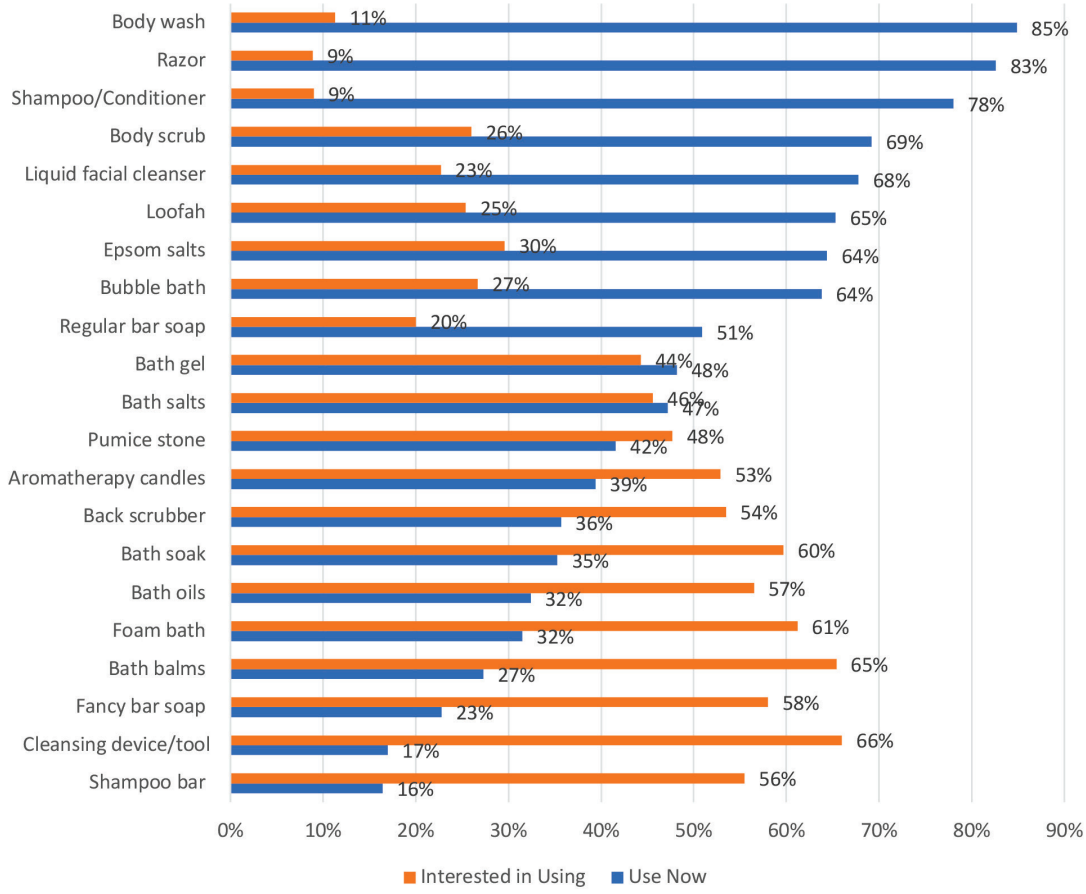
The importance of "me time" in the bath or shower rises with personal stress levels, as does the importance of the products consumers use when indulging themselves. To uncover shoppers' bath and body care habits, the brands they love, scents they crave, and after-bath skin care essentials, The Benchmarking Company (TBC) conducted an in-depth 56-question study in March 2023 with 3,800 U.S. women ages 18-plus.

The Luxury of Bathing

Taking a bath is a vital part of a well-rounded self-care routine, according to female beauty buyers who regularly take to the tub. Ninety-three percent of women who bathe in a bathtub do so to relax, 83% do so to pamper themselves, 67% do so for alone-time (make that 77% if she has one or more children under 18 years old in her household) and only 31% saying they bathe in a tub to get clean.

Of the 95% of women surveyed who have working bathtubs in their home, 21% say they take a bath once a week, while 15% do so daily. Fifty-three percent of bathers spend between 21 minutes and 45 minutes in the tub on average, with 17% spending 46 minutes to an hour each bath. The importance of their time in the bathtub was rated at 8.2, when asked to rate the activity's important on a 1-10 scale, with 1 being not important and 10 being very important.

F-1 Bath products consumers are interest in using



Bath Product Preferences

The scent of the products respondents use when in the tub is critical to the experience. When asked the importance of scent in a product used in the bathtub, that rating jumped to 9.3 using the previously mentioned 10-point scale. Seventy-eight percent of the products they use in the bathtub now have a fragrance. Respondents' top 10 scents used in the tub today are featured in **T-1**.

About 66% of bathers use brands marketed as feminine brands in the bathtub, 52% use brands priced as mass market, 73% use traditional formats of products (i.e., bar of soap, liquid shampoo, etc.) and 78% use bath products that are fragranced.

Products Bathers Currently Use

Body wash (85%), razors (83%), traditional shampoos and conditioners (78%), body scrubs (69%), and liquid facial cleansers (68%) top respondents' list of items used currently in the bathtub when bathing. Using a loofah (65%), Epsom salts for sore muscles (64%), bubble bath (64%) and regular bar soap (51%) round out the most used items.

Products Bathers Want to Use

The women surveyed are interested in adding more products to their tub routine (**F-1**), with 66% compelled by a cleansing device/tool. Sixty-five percent are interested in trying bath balms, 61% would try a foam bath product, 60% are interested in bath soaks, 58% would try fancy bar soaps, 57% would

T-1. Top scents currently used in the bathtub

Scent	Used in bath now
Lavender	61%
Vanilla	58%
Coconut	53%
Citrus	44%
Almond	43%
Fresh	43%
Cherry blossom	43%
Berries	42%
Eucalyptus	41%
Soft floral	41%



Top fragrances used in the shower include vanilla (53%) and coconut (52%).

T-2. Shower products consumers currently use/are interested in using

Products in shower	Use now	Interested in using = Brand opportunity
Shampoo/conditioner	97%	2%
Body wash	90%	8%
Razor	88%	7%
Shower/bath gel	80%	16%
Facial cleanser	77%	16%
Body scrub	69%	26%
Liquid facial cleanser	69%	22%
Loofah	65%	24%
Shaving cream	60%	24%
Regular bar soap	54%	17%
Foaming shower gel	39%	52%
Pumice stone	37%	47%
Back scrubber	35%	53%
Fancy bar soap	25%	48%
Shower/bath oils	22%	60%
Shower cream	21%	65%
Hand soap	20%	24%
Cleansing device/tool	17%	61%
Aromatherapy candles	17%	55%
Baby oil	10%	38%

give bath oils a try and 56% would like to try a shampoo bar format, among other products.

Consumers' Shower Habits

While taking a hot bath is a treat, the reality is 82% of female consumers tend to shower more than they bathe. Fifty-five percent of respondents take a shower daily, 23% shower every two days, 7% do so every three days and 8% said they generally shower more than once a day. Seventy-three percent say that showering feels like self-care, 64% agree that shower time is me time and 47% enjoy their long, leisurely showers.

Like bathers, those who shower admit "time in the shower" ranks at an 8.8 on a 10-point scale. Average time in the shower is 10-20 minutes for 54% of respondents, and 21-45 minutes for another 29% of showerers.

Shower Necessities and Brand Opportunities

Seventy-nine percent of those who shower use between three and six products each time they do so, with 77% saying they enjoy their shower product variety. Products used in the shower are usually those marketed for women (63%), masstige-priced products (50%), traditional formats (80%) and fragranced (79%).

Respondents' shower products differ slightly from the bath products used (**T-2**). They use shampoos and conditioners more when showering (97%), as well as body wash (90%), razors (88%), shower gel (80%), facial cleansers (77%), body scrubs (69%), liquid facial cleansers (69%), loofahs (65%) and shaving cream (60%). The body scrubs that respondents use most frequently are sugar scrubs (87%), followed by salt scrubs (39%) and pumice scrubs (23%).

Of respondents who share a shower with a male family member, 32% say the male family member uses all different products than she does in the shower, with 58% saying the male uses some products that are different, with some the same.

Shower Scent Significance

Respondents rated the scent of shower products as a 9.2 in importance on a 10-point scale. Top fragrances used in the shower include vanilla (53%), coconut (52%), lavender (51%), fresh (44%), citrus (42%), almond (41%), berries (41%), clean/linen (40%), soft floral (38%), cherry blossom (38%), orange blossom (36%) and eucalyptus (36%).

A wide variety of shower scents is also important, with 65% of consumers saying they change out the scents or products in their shower on a regular basis. Specifically, 31% switch their

shower product scents every month, 31% switch every couple of months and 22% say they do so weekly.

Their reasons for switching scents include discovering a new product scent that they like in-store and then buying it (72%), picking a scent based on mood (50%), choosing scents to match the season (46%), and boredom with an existing scent (41%). Sixty-eight percent of consumers match the scent of their bath/shower products to their post-bathing body skin care products either sometimes or almost always.

Bath & Shower Product Buying Habits

Thirty-two percent of female consumers spend more than $200 per year on products for use in the bathtub and shower; 17% spend between $151 and $200; 17% between $101 and$150; and 20% between $51 and $100.

Superstores are their go-to types of retailers for bath and shower products, with 74% buying at retailers like Walmart and Target. Sixty-one percent buy products for the shower and tub at Bath & Body Works or another specialty bath and body store, 58% buy on *Amazon.com*, 46% at a drug store, 44% at Ulta, 41% at Sephora, and 36% at a discount department store.

Untapped After-bath Needs

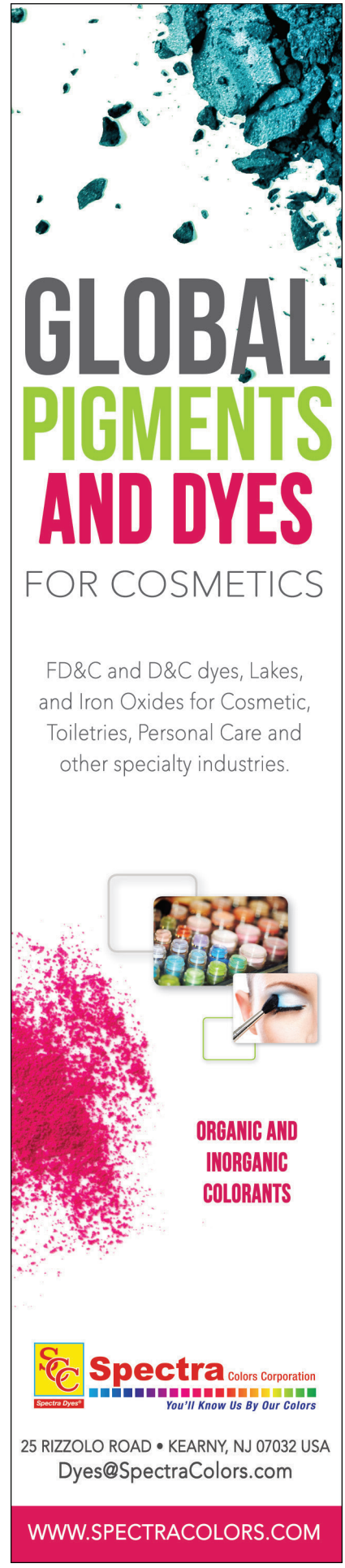
Ninety-eight percent of the women surveyed use body skin care products after bathing or showering, based on a need for certain skin conditions, or for general cosmetic purposes.

Their top cosmetic reasons for using body skin care products are to moisturize the skin (96%), to put a great scent/smell all over their skin (84%), for anti-aging purposes (69%), to smooth rough skin texture (69%), for a luxurious feel (56%), to prevent the look of chalkiness (31%), to decrease itching (29%), to mask occasional blemishes (27%) and for a glistening effect on the skin (20%). Fourteen percent use body skin care products to treat chronic skin care conditions like psoriasis, eczema, KP (keratosis pilaris) and the like.

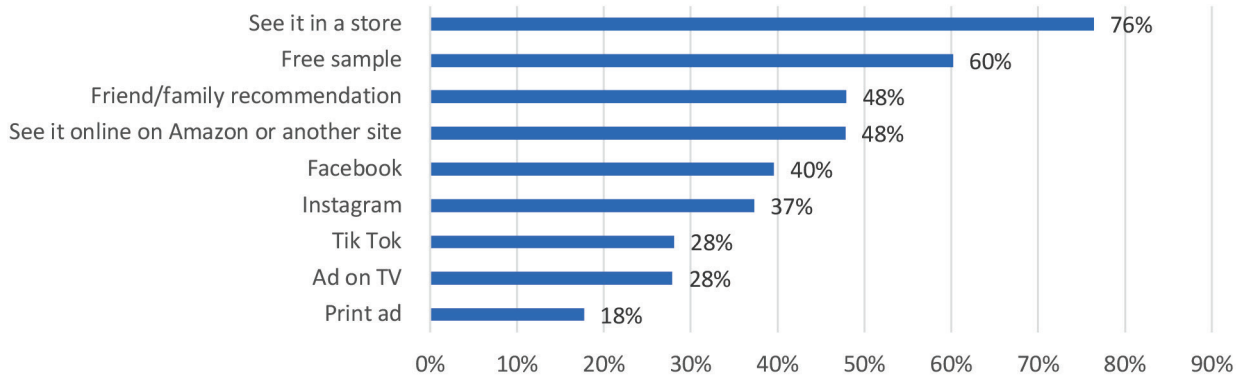
The most used body skin care products (**T-3**) include body lotions (95%), hand creams (70%), body creams (68%), body sprays (54%), body butters (50%), foot creams (46%), petroleum-based moisturizers (32%) and body oils (31%). Seventy-five percent of consumers who use body skin care products say that some (but not all) of their body skin care products contain SPF.

T-3. After-bath products consumers currently use or would like to use

After-bath products used	% Use now	% of interest = Brand opportunity
Body lotion	95%	4%
Hand cream	70%	25%
Body cream	68%	29%
Body spray	54%	34%
Body butter	50%	44%
Foot cream	46%	47%
Petroleum-based moisturizer	32%	39%
Body oil	31%	51%
Body treatments	21%	67%
Foot mask	18%	66%
Hand mask	13%	70%
Baby oil	13%	38%
Intimate care cream	12%	51%
Cellulite treatment	7%	72%



F-2 Where consumers most often first learn of new bath & body products



Body Skin Care Buying and Usage Behaviors

On average, 36% of women who use body skin care products apply those products throughout the day as needed, with 32% applying both morning and evening and 27% applying once a day. Thirty-two percent of female consumers spend more than $200 per year on body skin care products, 21% spend between $51 and $100 annually, 19% spend between $101 and $150 per year, and 15% spend between $151 and $200 per year.

Like the products respondents use in the bath and shower, superstores (73%) and specialty body skin care retailers such as Bath & Body Works (57%) are the top two destinations for body skin care products. Fifty-six percent buy body skin care products on *Amazon.com*, 47% at a drug store, 45% at Ulta, 43% at Sephora and 35% at a discount department store.

Respondents like to buy bundles and gift sets involving bath and body products as well, with 67% having bought a bundled bath and body product set for themselves in the past.

Excluding hair care products, consumers were asked to name their favorite brands of products for use in the bathtub or shower, and their favorite brands for body skin care products. Bath & Body Works, Dove, Olay, Lush, Method and Aveeno were favorite brands for bath and shower products. For body skin care brands, Bath & Body Works also ranked highly, as did Aveeno, Olay, CeraVe, Cetaphil, Eucerin, Nivea and Clinique.

T-4. Shower/bath innovations survey respondents are most interested in

Innovation	Interest level: Brand opportunity
Shower crème—applied in shower; rinse to activate moisturization	82%
Retinol body lotions	74%
Personal in-shower grooming tools	73%
Steamers	71%
Oil-based body washes	60%
Lymphatic body treatments	58%
Adaptogen-enriched body care treatments	58%

Novel Bath & Body Product Interest

Consumers are ready to step out of their comfort zone when they step into, and out of, the shower. When asked to rank the appeal of novel bath and body products, an array of innovations rose to the top, indicating exciting brand opportunities (**T-4**).

Showcasing new innovations where consumers say they generally learn about new bath and body products will be a key to brand success. These include in-store displays (76%), samples through subscriptions or in-store (60%), *Amazon.com* or another site where consumers research new products (48%), and, of course, social media (**F-2**). ■





DENISE HERICH and **JENNIFER STANBURY** are co-founders of The Benchmarking Company (*www.benchmarkingcompany.com*). The Benchmarking Company provides marketing and strategy professionals in the beauty and personal care industries with need-to-know information about its customers and prospects through custom consumer research studies, online and in-person focus groups, and consumer in-home use testing (IHUTs) for marketing claims and risk mitigation.

Do Beauty Incubators Still Matter?

BY JUDAH ABRAHAM, Slate Brands



With our in-house brands, Insanely Clean and the forthcoming Modern Magic, we have full control and run these in our own vision.

It seems like the concept of beauty incubators popped up overnight. In the days of the peak YouTube beauty influencer phenomena, a few big names started appearing in the market. These early incubators gave celebrities and creators (internet celebrities) the opportunity to develop their very own products, either through exciting collaborations or by making their own standalone brands.

Fast forward to today, and news of closures, lawsuits and everything in between has flooded our beauty news feeds. People could be forgiven for asking whether incubators are a thing of the past. The answer is: no.

No two beauty incubators are alike. Each has their niche, way of operating and specific types of brands they support. I truly believe these incubators are an important part of the beauty ecosystem and feed its creative pipeline.

Speaking from personal experience as founder of beauty incubator Slate Brands, based in Brooklyn, this is what I've learned so far.

What's an Incubator?

What an incubator actually does can vary widely, but at its core an incubator helps bring new brands to life and



Judah Abraham, Slate Brands.

provides support, resources and facilities for startup businesses.

With Slate Brands, we found our niche in Gen Z consumer brands, fragrance, men's skin care and creator-led brands. We've fine-tuned the incubator concept and made it our own.

My team and I only want to bring the most innovative beauty brands to market. And when I say innovative, it isn't for shock value or for marketing's sake. We want to fill white space and add something of value. The world doesn't need another beauty brand for the sake of it; we want to give people what they need—maybe before they know it themselves.

With our in-house brands, Insanely Clean and the forthcoming Modern Magic, we have full control and run these in our own vision. With creator brands such as Hue, Me Nails, Vagitaminz and Mirrored Image, we have a systematic way of approaching who would be a good fit.

We only want innovation, and not everyone can carry their own brand. We've seen that an entrepreneurial spirit, authentic product connection and an engaged audience makes for success.

We're not owners of these brands but a partner. The talent is the CEO and we work to bring their vision to life.

In a joint venture, we come in as an investor. Here, we have much more involvement and control than we do in talent-led brands. It's imperative that we find the right fit with the right partner.

Formulating a Deal

Every deal differs, and we understand how to best structure them based on the specific situation. Sometimes there are questions about the joint venture agreements, which can be a challenge.

It's important to set expectations from the beginning, so when scaling, everything is clear. Also, it's essential to make sure everything is in writing, legally, and signed as both brand partner and talent/creator needs can change.

We occasionally get requests for licensing deals. With these, we try to forge an agreement in a way that is simple—unlike a traditional license, the talent keeps all IP.

In all these cases, Slate Brands comes in as a partner with the ability to effectively bring ideas to life and build long term value. Incubators have the advantage of existing internal structures and systems, industry connections and know-how as an added value, allowing brands to scale more quickly.

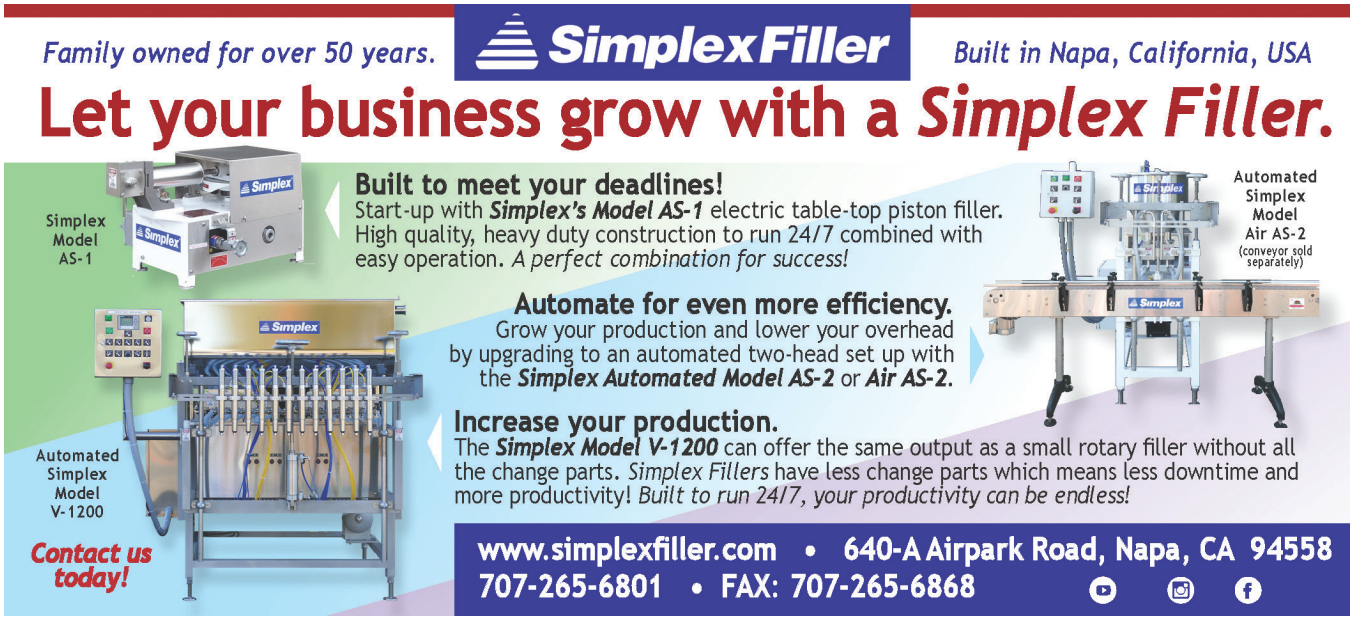
Further, there's enough profit going to the talent to motivate them to do these deals. But it's not all about cash flow and cost opportunities—it's also about knowing they're building something larger, something they can fully take over themselves once the license ends and continue growing.

Building an Authentic Following

The best creator brands don't always have the largest followings. We see our creator partners as entrepreneurs, with an engaged audience already built in. Those with a strong personal brand who work diligently on bringing their vision to life and can effectively communicate with their audience see the most success. This is ultimately what will sustain them after launching.

In an age when brand deals appear to take precedence over honest feedback, creators are seeking to instill trust in their audiences by being relatable, listening and being connected. There are risks to being inauthentic.

A recent backlash against a big beauty creator comes to mind. She was



accused of adding false eyelashes to her final look when promoting a mascara for a beauty conglomerate. The internet erupted in an outcry and a discourse on dishonesty and over-consumption in the industry ensued.

As an added benefit, when creators launch their own brands, it gives them the freedom to not solely rely on brand deals for income, freeing up their ability to tell it like it is.

What's Next for Brands?

Looking forward, brands will have to add value to the market rather than just having cool packaging.

And brands that solely capitalize on a trend will find they'll miss out on it entirely, given the pace the industry is moving at today. It can sometimes take 14-18 months (at a minimum) to launch a brand—by then the trend will have passed. So, unless you're the one creating trends, you'll most likely always be too late.

We also know that brands will need to be more transparent than ever, to give consumers the information they need to make decisions for themselves. With this, there will be a continued rise in authentic indie brands that aren't beholden to strict rules and brand guidelines.

There will be a rise of wellness brands in the industry—and brands that are community minded. We also see a continued interest in fragrance and further development of personal fragrance wardrobes—meaning fewer top-selling products with not as many repeat purchases but an overall increase on spend in the category in general.

What's Next for Incubators?

I've learned that leveraging knowledge, resources and data while applying systems and executing is how to get the job done. Not to mention, in this business, it's important to keep the entrepreneurial mindset of being scrappy while always striving to create brands that really add value.

Incubators must also be certain to always partner with the right founders. They are a business partner at the end of the day, and you need to find someone who fits the bill.

Launching a brand can be challenging. While not every brand needs to launch using an incubator, the services an incubator provides makes a lot of sense for many.

That range of services continues to expand.

For example, we developed an agency portion of the Slate Brands business that handles everything in-house as you would at PR, marketing or brand design agencies. Our digital marketplace, SlateLand, hosts all our brands and like-minded brands in one e-commerce platform.

We are currently developing our data, trends and insights capabilities as well. We already use them for all our decision-making internally, but we want to share what we gather externally for consumption by consumers and the wider industry.

The advantage of incubators is that they can quickly apply systems built on their knowledge from one thing to the next, making them incredibly useful for quickly testing out ideas and seeing what works.

By doing so, incubators provide an invaluable tool for creators, allowing them to rapidly launch ideas based on the infrastructure of years' worth of systems, proprietary data and industry knowledge. ■



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Top Growth Beauty	**Jennifer Famiano -** Circana (previously NPD)
Nanofibers as Advanced Waterless Delivery Systems	**Dr. Laura Frazier, Chief Scientist -** TaikiUSA/Boshi Beauty, Inc
The Mind-beauty Connection	**Nicole Ostoya, Founder -** Neon Hippie **Nadine Joseph, Founder & CEO -** Peak and Valley **Kylene Campos, CMO -** Tatcha
Biotechnology: Delivering Efficacy and Sustainability to Beauty	**Brian Grady**
Cutting Edge Science in the Service of Skin: Performance Ingredients to Fight Aging and Counter Direct Environmental Exposure	**Nadine Pernodet, Ph.D. -** The Estée Lauder Companies

6/7 Sessions

Top Growth Beauty in Social & Search	**Yarden Horwitz, Co-Founder -** Spate
Investment-Worthy Beauty	**Meg Maupin, CEO -** OurX
The Beauty of Transparency	**Rita Silva, Scientific Communications Manager -** Deciem **Sydney Petrovic, Head of Brand -** The Ordinary **Rachel Grabenhoffer, Managing Scientific Editor -** Cosmetics & Toiletries
Cleanical Beauty	**Rob Robinson -** BeautyStat **Marie Mignon, Chief Scientific Officer -** Prose **Chris Payne, CEO -** Jane Iredale

6/8 Sessions

How Influencers Influence Skin - and How Brands Should Respond	**Zoe Diana Draelos, M.D. -** Dermatology Consulting Services
The State of Conscious Beauty	**Annie Jackson, Co-Founder -** Credo **Muffy Clince -** Ulta Beauty

6/9 Sessions

Decoding Beauty innovation	**Anna Mayo -** NIQ
Fermented Beauty	**Michelle Shieh -** AmorePacific U.S.
Marine Beauty from Microalgae	**Tammy Yaiser, VP of Product Development -** Algenist

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Skin Care Gets DEMOCRATIZED

Consumers have become savvy about ingredients and claims, challenging prestige and luxury brands to justify their price points.



Lower-priced skin care brands have successfully leveled up with premiumized positioning, as well as ingredient and formulation transparency.

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Skin care dominated mass beauty in 2022, according to Circana, with facial skin care as the top-performing segment across the entire sector[a,b]. In fact, skin care was one of only two mass categories to grow units last year.

Circana's Larissa Jensen explained in a recent analyst note, "We are observing a democratization of the skin care market, as more consumers decide that they can actually spend less to get the desired results—whether that means purchasing lower price points within the prestige stores or turning to dermatologist-recommended brands in mass outlets."

The challenge has been particularly difficult for luxury skin care brands.

Skin Care's Luxury Challenge

A recent analysis from Circana's Jennifer Famiano notes that the average fragrance price "is more than double that of skin care, and it continues to rise[c]."

These dynamics can propel significant growth. Circana previously reported that the complete fragrance market (mass + prestige) in 2022 grew 11% year-over-year, totaling $12.7 billion. Super premium fragrance brand sales jumped 18% in the same period.

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 the full-category volume.

So why don't shoppers see value in trading up for luxury skin care?

Circana defines luxury skin care as brands with 2x average prices compared to the overall category. By this definition, luxury brands hold just 10% of the total sector, compared to 60% among comparable scent brands.

Famiano reports that luxury unit sales in the first two months of 2023 were flat, compared to 17% in the overall prestige category, while sales revenue climbed 2%.

The challenge is that lower-priced skin care brands have successfully leveled up with premiumized positioning, as well as ingredient and formulation transparency, while also proving that quality products can be had for $15 or less.

As a result, more than "50% of U.S. consumers say they avoid spending a lot on skin care," while "64% report that brands at mass merchandisers are as good as higher priced brands."

Given this state of affairs, Famiano concludes that luxury skin care brands will need to redefine their "why" to beat out competitors across all price tiers.

Ingredients & Claims Come First

We can see this effect on a key beauty growth platform, Amazon. Per a recent NIQ analysis[d], serum, vitamin C and oil top Amazon skin care sector searches. Brands are nowhere in sight.

Spate, which continuously tracks ingredient search data, has found that snail mucin, rice and Ayurvedic favorite chebula searches reflect growing interest in botanical materials as potential alternatives to harsher chemicals like glycolic acid and tretinoin (**T-1**). Similarly, tepezcohuite, a traditional medicinal material found in the Americas, has also emerged in consumer searches as a gentler remedy for psoriasis and acne.

The NIQ report found that many Amazon shoppers seek out hero ingredients, which accounts for the steep rises in searches for lactic[e] and salicylic acids, as well as strong but modest increases for hyaluronic acid, niacinamide and retinol.

Amazon skin care shoppers also shop by claims, the most common of which are oil control, dark circles, age spots/dark spots and brightening.

The trend appears to be spreading beyond facial care.

In 2022, U.S. prestige skin care sales increased 12%, with body products growing at more than three-times the rate of facial products. An April 2023 Spate analysis reports that body

[a]www.circana.com

[b]*The complete (mass + prestige) skin care market grew 10% year-over-year in 2022, totaling $30.5 billion, per Circana data.*

[c]www.npd.com/news/blog/2023/luxury-skincare-takes-on-new-meaning/

[d]https://nielseniq.com/global/en/insights/analysis/2023/navigating-the-amazon-beauty-landscape-in-2023/

[e]*Spate recently reported that there are 2.8K searches on average every month in the United States for lactic acid serum, a rise of almost 46% year-over-year, though still representing a relatively low volume. Claims associated with the ingredient format include resurfacing, hydrating, peel and exfoliating. In addition, the format is often searched alongside glycolic acid and squalene, revealing a desire to combine ingredients, per the firm;* https://hubs.la/Q01snlKM0.

T-1. Top-growing skin care ingredient searches in 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 (US Search Data, ending December 2022)

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

products have increasingly become ingredient-centric.

The report notes that Naturium has experienced year-over-year search volume growth of more than 500%. Notably, consumers are searching the brand alongside key ingredients, including vitamin C, niacinamide, azelaic acid, tranexamic acid, peptides and BHA. And where do these shoppers want to buy these products? Target and Amazon.

The Efficacy Factor

Ingredient-centric mindsets are a direct result of shoppers seeking specific outcomes. As seen in the Circana data, shoppers seeking value in skin care prioritize efficacy. In fact, per Mintel data presented at a February 2023 CEW briefing, 39% of U.S. skin care consumers feel it's important for skin care products to be recommended by a doctor or dermatologist[f].

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

Leave Room for Fun

With all the focus on value, ingredients and claims, brands must be sure to embrace skin care's inherent fun.

"Repeated use, especially when it comes to protection products like sun care and treatments for hair or atopic skin (e.g., acne or eczema) will happen if the skin care products are fun," says Arnita Wofford, marketing and technical sales director, beauty and personal care, Univar Solutions. "If the products are fun to use, consumers will keep applying and see the results and intended benefits. Insta-effect products are also important as they can encourage continued use to get the full effect from the active ingredients."

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



Clariant Actives and Natural Origins has launched Rootness Mood+, an active skin care ingredient derived from the roots of Sanguisorba officinalis that triggers the skin's photoreceptors.

Wofford continues, "Beauty is often part of a larger wellness routine and considered not just a means to an end, but an enjoyable experience. Continuously delivering new textures, new application methods and rituals is important to keeping consumers interested and loyal."

This focus can have unexpected impacts.

Wofford explains, "In some ways, existing product innovation is contributing to sustainability. Instead of completely revamping a formula, creating a new gesture, a new step, or a new benefit with something existing (all while keeping it fun) is the way to go."

Differentiating Ingredients, Claims & Formats

Given the importance of ingredients and claims in the democratized skin care space, *Global Cosmetic Industry* rounded up an array of newly released innovations to inspire future on-trend R&D.

Clean, Sustainable Alternatives & Formats

"Conventional raw materials are being removed from the palette mostly due to regulatory influences such as micro plastics, cyclic replacement and the new 1,3-dioxane level regulations, which are changing how we formulate," says Wofford. "Close consideration of environmental impact like biodegradability and life cycle analysis (LCA), eco-toxicity, consumer perception, and expectations of driving environmental and industry change are all key in ingredient choice. Many brands want to know how to achieve instantaneous, visible and perceivable results within skin care, yet still respect the naturality of the formula."

One such technology, Dow's EcoSmooth Rice Husk Cosmetic Powder, provides instantaneous optical blurring effects with improved sensory feel, per Wofford. The ingredient addresses the impending requirements under the European Union's microplastics regulations.

BioEstolides from Biosynthetic Technologies, meanwhile, are derived from a natural and sustainable source of castor oil and provide a wide range of multifunctional benefits within formulations, including boosting UV, heat protection in hair care, pigment dispersion and emollience.

Also from Dow, the EcoSense APP 5000 Formulation Aid represents a flexible oil-in-water (O/W) emulsifier of 100% natural origin, says Wofford. The technology is PEG-free and features 100% renewable carbon made from wood certified by the Forest Stewardship Council and Programme for the Endorsement of Forest Certification. In formulations, the technology can emulsify up to 40% oil phase.

Wofford notes that ingredients can also support the creation of more sustainable product formats.

She explains, "Solid formats are certainly something brands are looking to formulate. For consumers, it's an easy, portable, and an eco-friendly and multifunctional alternative for traditional products like shampoos, conditioners, sunscreens and moisturizers. However, making solid formats isn't a simple task. Finding the right emulsification system, structuring agents, surfactants and emollients that hold up in these systems requires talent. The formulation isn't the only challenge. Packaging these formats can be difficult as the stability of solid formats requires custom packaging, which is often expensive and not circular. Nevertheless, consumers love solids for the concentration and economic potential of buying less often. Brands must, however, educate consumers on the economic and environmental benefits of concentrated or waterless formats."

Univar Solutions' All Over Hydrator Cleansing Bar concept formula represents a three-in-one solid mild cleanser for body, hair and face. In additional to the convenience of multifunctionality, the solid format requires a small amount of water to activate and cleanse.

Sun-harnessing Skin Care

Clariant Actives and Natural Origins have launched Rootness Mood+, an active skin care ingredient derived from the roots of *Sanguisorba officinalis* that triggers the skin's photoreceptors to:

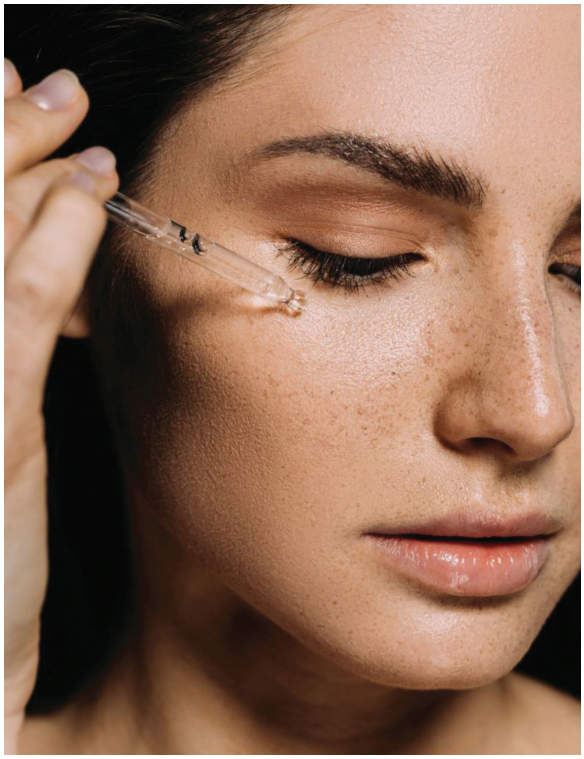
- enhance sunlight benefits, in part by upregulating vitamin D downstream pathways to increase the vitamin's effects;
- reactivate the skin's natural radiance;
- and improve the complexion.

"Our modern lifestyles make us forget the need to spend time outdoors and this has direct effects on skin appearance," says Julie Droux, global technical marketing manager for actives and natural origins. "Rootness Mood+ can buffer against the effects of seasonal variations and reduced sun exposure, cosmetically reproducing light's benefits on the skin, offering a way to improve skin beauty and complexion."

Prejuvenating Anti-aging for Gen Z

Lubrizol's oil-soluble Argireline YOUth peptide addresses the prejuvenation anti-aging concerns of younger consumers by slowing the onset of the signs of aging in a way that mimics botulinum toxin. As Spate recently reported, younger consumers are increasingly exploring medical aesthetic procedures, as well as cosmetic products that offer similar results.

Argireline YOUth represents an alternative to the company's standard Argireline peptide, which was designed to smooth out wrinkles. The new Argireline YOUth peptide benefits from the LipoClear inverse micelle delivery system, which allows for the creation of an oil soluble active ingredient. As a result, the new peptide can reportedly be expanded to new applications, including oil-based skin care, especially transparent serums,



Lubrizol's oil-soluble Argireline YOUth peptide addresses the prejuvenation anti-aging concerns of younger consumers by slowing the onset of the signs of aging in a way that mimics botulinum toxin.



Holobiosys is derived via an upcycled fermentation process that applies a cold-tolerant bacteria from the French aerobiota to wild yellow gentian root extract.

oils and sticks. These products can be used as alternatives to professional treatments or as a stopgap between aesthetic treatments.

Volunteers of Caucasian and Latin American descent between the ages of 19 and 35 were given a makeup foundation with 2% Argireline YOUth peptide oil solution to apply daily. Volunteers of Asian descent between the ages of 25 and 40 were given an oil serum with 0.8% Argireline YOUth peptide to apply daily. The in vivo results showed a minimized appearance of expression lines, without compromising the smile expression, as well as shorter and less visible wrinkles around the eyes, per Lubrizol.

Smiles were assessed via AI that leveraged SmiLearning smile rating technology, which reportedly measures post-skin-treatment satisfaction. Per Lubrizol, volunteers registered a 22% bigger smile compared to a placebo.

Furthermore, the technology smoothed the skin around the eyes and in the nasolabial and forehead regions, while also diminishing the appearance of "tech neck" lines.

Multifunctionality for Simplicity & Value

"The cost of living is driving the value and benefit cost analysis when it comes to beauty purchases," says Univar Solutions' Wofford. "Multifunctional products often allow consumers to skip a step or combine two or three much loved product benefits into one finished product."

She continues, "For example, Univar Solutions' All Bodies Glow SPF 30 Sun Cream [concept formulation] not only delivers 98% natural (ISO 16128) sun protection, but also hydrates and delivers a radiant glow and bronzed effect."

Wofford concludes, "Products should be multifunctional, inclusive—genderless and ageless—and focused on the needs of the consumer. Product personalization and the addition of more benefits in one product is

CONSUMERS' TOP SKIN CARE CONCERNS



Google is the top source for skin care information for consumers, though Style Seat found that family advice and social media influencers also make the cut.

Among the fastest-growing skin care concerns are dermatitis, sunburns and milia, according to Spate[a] search data for the 12 months ending November 2022. But the firm has also identified emerging concerns, including the skin barrier, which boasts just 3.5K monthly average branded searches in the United States. Typically, skin barrier searches accompany more common terms such as "acne" or the above-mentioned "dermatitis." This association can allow brands to make dual claims, Spate argues, such as barrier-building anti-acne products.

Elsewhere, a recent Style Seat survey[b] found that 78% of people surveyed say they need to take better care of their skin. Their top two skin concerns were dryness and, echoing Spate's data, acne. The top skin concerns reported by the firm's survey takers included:

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

As Spate's research shows, Google is the top source for skin care information for consumers, though Style Seat found that family advice and social media influencers also make the cut. However, only 8% of survey takers get skin care info from their dermatologist.

[a]https://hubs.la/Q01snlKM0
[b]www.styleseat.com/blog/skin-care-across-america/

the key to consumer loyalty going forward. It's not just about pricing, it's about a perceived benefit after use and the reduced environmental impact from the cosmetic industry, thanks to less waste."

Biotic Skin Care

A number of ingredient producers have expanded the palette of biotech skin care technologies. For instance, Greentech's new Holobiosys restores skin hydration, imparts smoothing effects and invigorates the skin holobiont. The study of the holobiont, a consortium of the body and all microorganisms present on/in it, provides a comprehensive view of the interactions between the skin and its microbial ecosystem. This systemic method reportedly allowed Greentech to develop a technology that treats the skin as a whole to address the slowdown of skin barrier and antioxidant functions associated with aging and loss of hydration.

Holobiosys repairs conditions of dry and dehydrated skin via a boost of hyaluronic acid (HA) in the epidermis and dermis via stimulation of the HA receptor CD44, and skin lipid synthesis in keratinocytes for a more cohesive epidermis able to lock in skin moisture.

The technology also stimulates dermal-epidermal junction marker expression for a better diffusion of water bound to HA within the skin. In addition, antioxidant cell responses are upregulated after treatment with Holobiosys both in keratinocytes and fibroblasts for protection against HA degradation by free radicals.

In clinical tests with volunteers, the ingredient purportedly increased the skin hydration index after 28 days of application at 1% vs placebo and smoothed wrinkles. It also protected the hydrolipidic film and had a lipid-replenishing effect on a sub-panel presenting dehydrated and sebum-deficient skin.

Holobiosys is derived via an upcycled fermentation process that applies a cold-tolerant bacteria from the French aerobiota to wild yellow gentian root extract.



Cosmetic Group USA's Glassy Layer Prep is a pearl rose translucent glassy serum concept that increases skin hydration and firmness, while defending against blue light emitted by tech devices.

Elsewhere, BASF Care Creations' new Probiolift and Postbiolift leverage dormant cells and bacterium metabolites to provide biotic anti-aging benefits.

Probiolift comprises dormant cells of living *Lactobacillus crispatus*, a Gram-positive rod-shaped anaerobic bacterium found naturally in the skin and which decreases with age. The dormant cells are said to "awaken" in contact with water on the skin, and reportedly make the skin appear fuller and improve the appearance of forehead wrinkles. The delicacy of live cells requires water- and preservative-free formulations, according to the company, which favors formats such as powders, among others.

The company has also unveiled Postbiolift, a postbiotic based on metabolites secreted by *L. crispatus*, which reportedly helps make the skin appear more elastic, smooths the appearance of crow's feet wrinkles and creates an appearance of an even complexion.

The technologies derive from BASF research that has found that lactic acid bacteria, including *Lactobacilli*, noticeably decrease in mature skin, particularly the under-eye zone and the wrinkle hollows of older research volunteers.

Twenty-nine female volunteers between the ages of 45 and 65, who had fine lines or wrinkles on their forehead, participated in a clinical study comparing a base cream formulation containing Probiolift at 0.05% against a placebo base cream formulation. Probiolift reportedly made the volunteers' skin appear fuller after two months. It also imparted a visible 5% reduction in the appearance of wrinkles compared to the placebo. Clinical results were supported by *L. crispatus* biological properties shown in advanced in vitro testing, according to BASF.

A placebo-controlled clinical study of Postbiolift was also conducted with 30 female volunteers between the ages of 40 and 50 with crow's feet wrinkles and color spots on the face. After 28 days and 56 days

(Continued on Page 26)

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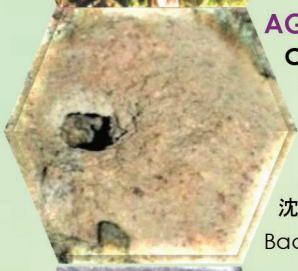
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CALAMBAC key component of Japanese, Chinese Siddha, Ayurvedic Arabic, Hebrew, Greek Traditional Medicine, Aromatherapy, Religious Medicinal Incense-Fumigation and Perfumeries known by various names Calambac, Agallocha Resins., White Qi-Nam, Ky Bach, in various cultures 沈香樹脂、うじゅくこう 熔融树脂奇楠, White Qi Nan -白奇楠" Bach Ky nam الخمير لغة المبارك القديمة. www.wodeyar.org



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Lonicera Japonica (Honeysuckle) Flower Extract
忍冬（金银花）萃取液
TSCA Listed | FEMA GRAS Listed | DHHS Listed
A Novel plant based preservative (lipo/oil soluble) for cosmetic formulations
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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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(Continued from Page 23)

of treatment with the ingredient formulated at 1% in a cream, elasticity increased among users of the Postbiolift cream by up to 10%. In addition, at the end of the 56-day study, Postbiolift had reportedly significantly decreased the appearance of crow's feet and pigmented age spots by almost 7% compared to the placebo.

Meanwhile, Roelmi HPC's EquiBiotics LRH is a probiotic-derived active ingredient from *L. rhamnosus* LRH020, which strengthens the skin's natural defenses against harmful bacteria; this, in turn, boosts the skin's resistance to aggressors such as UV rays, chemical agents and pathogen colonization.

The technology acts as a prebiotic, providing nourishment and support for resident microbiota (living probiotics) growth, thereby balancing the skin's ecosystem and strengthening the skin barrier.

By rebalancing the resident microbiota community through the promotion of commensal bacteria and avoiding pathogen aggressions, the technology can provide short-term hydration and skin regeneration and cohesion.

Elsewhere, Jojoba Desert's JD Phyto-Or 1% (INCI: *Simmondsia chinensis* (jojoba) seed oil (and) *Blakeslea trispora* mycelium extract/C30-45 olefin) achieved an 18.10 MyMicrobiome standard certification, ensuring it as a microbiome-friendly product.

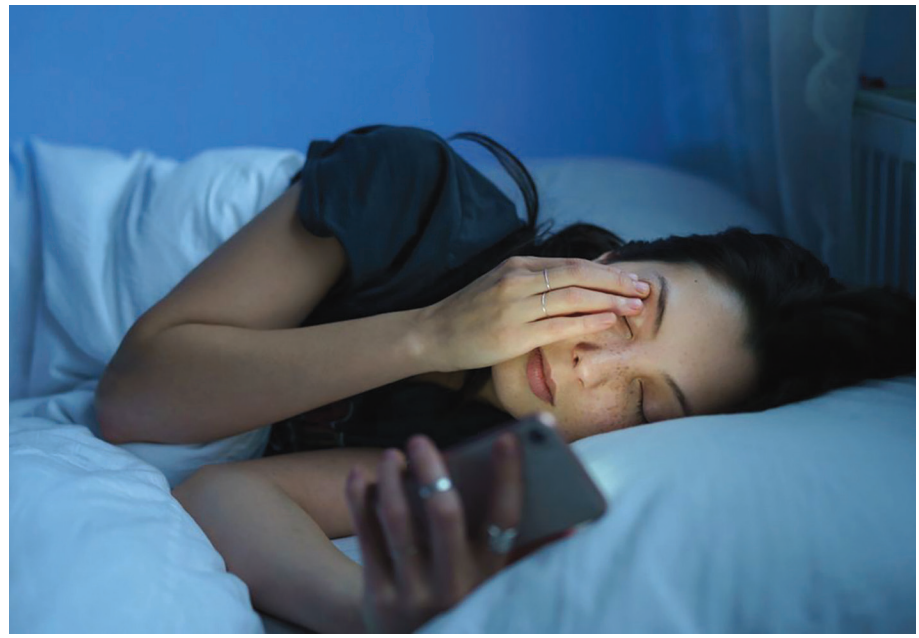
JD Phyto-Or 1% is an anti-aging active ingredient that, according to the company, protects and maintains the natural hydro-lipid skin barrier, evens skin tone and complexion, reduces wrinkles, resists extrinsic aging factors, and protects skin from reactive oxygen species (ROS).

The ingredient offers benefits for hair and skin, along with holistic values for biodegradable and sustainable products with full traceability.

Addressing White and Dark Pigment Disorders

Sederma's Mel[O]stem is an active ingredient that addresses both dark and white pigment disorders for an even complexion. The ingredient is obtained by biotechnology via plant cell cultures of scarlet beebalm leaves.

Solar lentigo (dark spots) and idiopathic guttate hypomelanosis (flat white spots or "white freckles") are pigment disorders both caused by sun damage to the melanocyte and its environment, according to Sederma. Mel[O]stem's approach focuses on the melanocyte's balance for proper activity, with an expert-measured 64% improvement of complexion evenness versus a placebo in a clinical study.



Cosmetic Group USA's Glassy Layer Prep is a pearl rose translucent glassy serum concept that increases skin hydration and firmness, while defending against blue light emitted by tech devices.

Blue-light-proof Serum

Cosmetic Group USA's Glassy Layer Prep is a pearl rose translucent glassy serum concept that increases skin hydration and firmness, while defending against blue light emitted by tech devices. The formulation comprises hyaluronic acid (sodium hyaluronate) to pull in moisture, plump the skin and reduce the appearance of fine lines and wrinkles. It also comprises vitamin B3 (niacinamide) to brighten the skin, improve moisture retention, and further support the reduced appearance of fine lines and wrinkles. It also features Mibelle Biochemiostry's Happybelle O (oil version; INCI: *Vitex agnus castus* extract and *Helianthus annuus* (sunflower) extract), which (according to the supplier) increases collagen I and II, boosts skin hydration and firmness, and decreases wrinkle depth. Finally, blue light defense is provided by rice-derived ferulic acid to absorb long UV light. The formulation is vegan and compliant with Sephora and Credo clean requirements.

A Plant Blend CBD Alternative

Clariant's Beracare CBA (INCI: *Copaifera officinalis* (balsam copaiba) resin (and) *Passiflora edulis* seed oil (and) tocopherol) is an active blend of Amazon oils that reportedly offers a natural alternative to cannabidiol (CBD). In formulations, the technology soothes sensitive skin by targeting the skin's endocannabinoid system, activating the CB2 receptors. This helps increase the production of β-endorphin, creating a soothing effect, according to Clariant. Data reportedly shows that the ingredient reduces skin sensitivity by 61% after

seven days and 71% after 28 days, decreasing redness and irritation, per the company.

A Shield for Stressed Skin

Gattefossé's plant-based Emulium Dermolea MB O/W emulsifier is rich in sterols and triterpenes, which can reduce skin stress and deliver long-term soothing. Composed of candelilla, rice bran and jojoba waxes, this technology creates a skin-compatible shield to protect surface lipids from environmental stress, which can negatively impact barrier function and thereby increase transepidermal water loss (TEWL). That loss results in dry, reddened skin that experiences a stinging sensation, as well as a burning sensation upon application of cosmetic products.

Available in pellet form, Emulium Dermolea MB's plant lipid composition is like that of the skin's surface and is reportedly rich in anti-inflammatory pentacyclic triterpenes and sterols. In formulations, it can emulsify oil phases up to 40% and create everything from thin sprays to thick butters. It is thereby suitable for skin care, sun care, makeup and hair/scalp care.

Upcycled Exfoliation

Sophim's new PhytOlive Fine is an exfoliating powder (500-micron grain size) upcycled from ground olive stones, offering multiple benefits for the skin, including: cleansing, purifying, soothing, brightening, softening and stimulation of cell renewal.

Produced in France's Provence region, PhytOlive Fine is COSMOS-approved and offers a bio-based alternative to plastic bead scrubs, as well as an upcycled alternative to sugar and salt scrubs. The inherent hardness of the stones lends the ingredient highly efficient exfoliation power. In addition, the material is rich in tocopherol (vitamin E) and oleic and linoleic acids, known for their antioxidant and nourishing properties.

PhytOlive Fine, sterilized via heat treatment, doesn't interact with the other ingredients within the formula, thus offering efficiency and stability to formulators.

Stress-resistant Skin Care

Oat Cosmetics' Rejuvaveen (INCI: *Avena sativa* (oat) bran extract) is an oat beta-glucan complex active that reportedly maintains stratum corneum integrity, fights against stress-induced skin thinning, combats dry desquamation to maintain skin hydration and improves skin smoothness. The ingredient comprises 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 can 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. ■



Rethinking Nutricosmetics
INSIDE OUT

Lifestyle-friendly formats, unique hybrid claims and new ingredients are driving innovation in holistic beauty concepts.

BY LISA DOYLE



Pills and tablets have long ruled the supplements sector, but an array of unique formats are taking over nutricosmetics.

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The rise of nutricosmetics in the last decade represents a growing focus among consumers on holistic, preventative solutions for beauty.

"In the early 2000s, consumers didn't yet have the idea of nutrition and facial conditions being connected," explains Douglas Jones, global sales and marketing manager, BioCell Technology LLC. "They kept going to the cosmetic aisle for their solutions. Fast forward ... and we've seen the beauty from within trend grow. Consumers now know that the better their nutrition, the better their health and appearance will be."

Instead of appearing solely in the supplement aisle, consumers are now finding nutricosmetics in the beauty departments of retailers such as Target and CVS, even as beauty specialists like Ulta and Sephora continuously add new ingestible brands, including Golde, Moon Juice and Sourse. It's no surprise, then, that the global nutricosmetics market was valued at about $6.9 billion in 2021 and is expected to expand at a CAGR of 8.1% through 2030, per Global Market Insights[a].

To better understand where the sector is going, we investigated what the most cutting-edge brands and ingredient suppliers are bringing to the market.

Lifestyle-friendly Formats

Gone are the days of "horse pills" as the only nutricosmetic solution.

O Positiv's Flo line, for example, features a gummy designed to fight PMS symptoms, including acne caused by fluctuating hormones. And, earlier this year, the brand expanded to include a gummy for its sister line, Meno, which helps prevent symptoms of menopause. Both lines now feature a vegan capsule option.

[a]*www.gminsights.com/industry-analysis/nutricosmetics-market*



Caliray, from Urban Decay founder Wendy Zomnir, has debuted a Get Lit skin- and mood-enhancing supplement.

"Our products are made to proactively target symptoms instead of waiting to react, or worse—masking harmful symptoms," explains Brianna Bitton, co-founder, O Positiv. "We use multiple form factors like tasty gummies and sugar-free capsules so our community can select whichever fits best with their lifestyle."

Caliray, from Urban Decay founder Wendy Zomnir, has debuted a Get Lit skin and mood enhancing supplement. To develop the product, Caliray partnered with Thorne, reportedly the only supplement manufacturer that collaborates with Mayo Clinic on health and wellness research and content.

Get Lit—a watermelon-flavored disc designed to be dissolved in a 6-8 oz beverage—features biotin, vegan D3, green tea, nicotinamide riboside (B3) and lutein. The formulation reportedly addresses uneven skin texture and loss of firmness, hair dryness, and more. It also helps to boost the user's mood and energy level.

Get Lit is packaged in a 100% post-consumer recycled box and plastic-free pouches and is available at Sephora U.S. and *caliraybeauty.com*.

Meanwhile, U.K.-based Nourished is leading the way in utilizing 3D printing technology for its individualized supplements for skin care.

"When we were developing Nourished, we looked at multiple manufacturing methods available, and 3D printing was the only option that would allow us to create true personalization at scale," notes Caitlin Stanley, chief of staff, Nourished. "We believe that if anything in this world should be personalized, it should be our health and wellness, and 3D printing technology allows us to create the most effective product possible. Our 3D printing manufacturing creates significantly less wastage than mainstream manufacturing techniques."

In January 2023, the company announced an exclusive collab with Neutrogena: Skinstacks, a 7-layered supplement that aligns consumers with their skin health goals. This product marks the first mass-market, 3D-printed dietary supplement specially designed for skin health routines, per Nourished, and is available to order online after taking a simple mobile quiz and selfie.

SELFMADE RIDES THE PSYCHODERMATOLOGY WAVE

Psychodermatology harnesses the intersection of psychology and dermatology, delivering results beyond aesthetic benefits. One such brand, Selfmade, declares itself an emotionally intelligent skin/body care brand.

Led by CEO and founder Stephanie Lee, the brand comprises the Corrective Experience Comfort Cream; the Comfort Serum+, featuring hyaluronic acid, Barnet Products' 1% Cortinhib G (a stabilized vitamin C) and marine algaes; the Resilience Scrub, featuring bamboo powder, fruit AHAs, holy basil, vitamin C and tee tree oil; the Intimacy Serum, featuring copaiba balsam, arnica flower, safflower oil and *Schisandra* berry; and more.

"Selfmade was never created to be a DTC-only [brand]," says Lee. "I've loved working with our current retailers Urban Outfitters and Thirteen Lune ... [T]hey've expanded their offering across our whole line as the consumer becomes more interested in psychodermatology: we're leading that conversation. Because we are more than products, we are reimagining what it can look like to move into retail and create an experience that evokes emotional well-being at the point of sale."

Lee recently took some time to speak to *Global Cosmetic Industry* about the power of psychodermatology in today's beauty market, as well as the importance of rituals and mental health.

"The skin care market is incredibly oversaturated, with a new brand, product and campaign popping up left and right," says Lee. "It's become hard to track as not just a brand founder, but a consumer, of what is effective and science-driven versus marketing language. Between the confusion around the amorphous definition of 'clean beauty,' consumer/industry outrage to the unending onslaught of celebrity brands, to the fall of influencer-led brands, we can see the consumer trying to navigate the noise post-truth era back to home base: facts and science."

She adds, "The power of psychodermatology is ... a discipline of medicine and research that has existed [for] over a decade ... As our world has become more stressful and we've been jolted into a mental health crisis accelerated by the pandemic, we are sick as a society and it is showing up on our skin, hair and bodies in a way we haven't experienced before."



The brand comprises the Corrective Experience Comfort Cream; the Comfort Serum+, featuring hyaluronic acid, Barnet Products' 1% Cortinhib G (a stabilized vitamin C) and marine algaes; the Resilience Scrub, featuring bamboo powder, fruit AHAs, holy basil, vitamin C and tee tree oil; the Intimacy Serum, featuring copaiba balsam, arnica flower, safflower oil and Schisandra *berry; and more.*

Lee concludes, "If we can understand [that] what happens on our skin (acne, moisture barrier loss, inflammation, etc.) is triggered by cortisol released in our body because of stressors, then we can put the self-judgement aside and learn to care for those needs ourselves."

Selfmade is designed to provide consumers with rituals that address contemporary mental health issues.

Lee explains that "96% of Gen Z reports experiencing anxiety today, with half saying, 'all the time,' and say mental health is a higher priority than physical health, according to the '2021 State of Mental Health Report' by Project Healthy Minds[a]. Rituals that are healthily constructed have the power to help emotionally regulate and increase productivity and performance due to goal setting and provide ways to connect with others socially."

[a]www.projecthealthyminds.com/news/press-release-phm-pulse-mental-health-survey

She concludes, "Rituals can bind ourselves to ourselves as a grounding force."

Selfmade keeps communication open with consumers when it comes to the co-creation of products, ensuring the brand taps into shopper needs.

"We built our junior advisory board of Gen Z and young folks as a way to build Selfmade with them and not just for them," Lee says. "It's clear by the type of feedback, encouragement and opinions they share that they feel ultimately responsible for creating the future they want, and that includes their skin care products."

She continues, "We have a Gen Z consumer, Maddy, who has been in contact with us several times during their customer journey. During the consideration phase, they asked tons of questions about our Corrective Experience Comfort Cream and even brought up the other product that they were deciding between. This gave us insight into what they are thinking about as they are making decisions in real time ... Fast-forward, they've just emailed back about packaging, usage feedback and about peptides. It's clear that not only do they do their research and care deeply about what they are using, but aren't afraid to take up the space and continue to help us cultivate conversations on what it takes to change how we take care of ourselves to be more effective."

Beyond product innovation, Selfmade communicates its mission to shoppers.

Lee notes, "Because we approach caring for ourselves in a therapeutic and research-backed way, we start by validating our concepts with our mental health experts and junior advisory board members to ensure that it addresses issues that pertain to our community and rooted building a healthy relationship with self."

She continues, "Once we have a concept, we have a mental health deep dive with our mental health experts, entire team and junior advisory board so that we can fully explore the concept and the connection of a body and mind through the lens of emotional well-being, like having a 'secure attachment style' for the Secure Attachment Comfort Serum+."

In its execution, the brand focuses on the importance of its psychological concepts in consumer well-being and taps into "metaphors or creative expressions" to express these psychological concepts through social media, graphics and packaging.

"The team then turns the output into a marketing, education, messaging, social, and micro-influencer strategy and plan," says Lee. "We look at the benefits of what a secure attachment style are (a feeling of safety with self to be vulnerable, healthy boundaries that help protect and maintain relationships, healthy bonding with others) and what could that look like in a product experience (taking down stress and improving hydration in the moments with ourselves in rituals, strengthening our skin's boundaries via the moisture barrier and as a makeup primer, and a texture experience that helps the formula bond to our skin and hyaluronic acid penetrating skin)."

She adds, "The product descriptions and the messaging are born out of the desire for giving our community ammunition that helps to create intentional experiences to fuel learning and curiosity around themselves and their physical and emotional worlds. We make it intentional in almost every touchpoint with the brand and products ... [to] spark curiosity in the pursuit of emotional intelligence and self-worth ... at our vanity, shower or nightstand. One of the first steps to self-awareness is expanding our emotional vocabulary, which is why each product embodies a tried and true human psychological concept: attachment, resilience and intimacy." ■



"When we were developing Nourished, we looked at multiple manufacturing methods available, and 3D printing was the only option that would allow us to create true personalization at scale," notes Caitlin Stanley, chief of staff, Nourished.

Ingestible Ingredient Innovations

Savvy suppliers are upping their innovation levels when it comes to ingestible ingredients. While snow mushroom extract has long enjoyed a strong reputation in Asia's vitamin sphere for its skin care and hydration properties, Applechem Inc. is taking the ingredient to the next level.

"We're very excited about our new grade of our Phytocare snow mushroom extract launching at all major trade shows later this year: a smaller molecular weight polysaccharide that provides deeper skin hydration benefits while doubling as a safe ingestible to promote healthy gut flora," says Wilson Lim, marketing and regulatory manager, Applechem. "Formulators now have the option to combine this new Phytocare extract with our higher molecular weight CG-1M grade to create a dual active complex that provides both strong barrier protection and potent hydration replenishment, while also rounding out their kit with snow mushroom-based dietary supplements for a true inside-out, microbiome-friendly product line."

The Phytocare line is composed of naturally sourced bioactives, such as collagen type I, vitamins C and A, and polyphenols from various fruits.

Nourished is incorporating a series of bioactives to deliver better skin health.

Stanley explains, "Some of our standout ingredients include [Pharmako Biotechnologies'] HydroCurc, one of the most bioavailable forms

of turmeric which is a potent anti-inflammatory; and [OmniActive's] Lutemax 2020, which is naturally derived from marigold flowers. Studies have shown Lutemax 2020 may include supporting cognitive performance, help to promote healthy-looking skin and may act as a stress reliever to help regulate mood levels."

The brand also incorporates renowned skin care aid vitamin C, but its source is what sets it apart.

Stanley notes, "We source our vitamin C from one of the highest concentrations of vitamin C in the world: the berries of a camu camu tree, a bushy riverside tree which his found in the Amazon rainforests of Peru and Brazil. Containing up to 3 g of vitamin C per 3/5 oz, we have concentrated the powder of camu camu berry so it contains more vitamin C per gram, compared to the fresh berries it is actually sourced in."

Meanwhile, Sabinsa's Curcumin C3 Reduct offers nutricosmetic benefit that have earned the stamp of approval as a Novel Food by the European Food Safety Authority (EFSA). The ingredient technology comprises antioxidant tetrahydrocurcuminoids from turmeric (*Curcuma longa*) rhizomes. The ingredient offers brands the possibility to offer antioxidant, anti-inflammatory and anti-glycation claims.



O Positiv's Meno is formulated with ingredients like KSM-66's ashwagandha and black cohosh to help relieve hot flashes, night sweats and occasional sleeplessness."

Want more from this author?

Check out ***Clean Makeup is Ready for the Spotlight*** *in our* ***April 2023 edition.***



"Formulators now have the option to combine this new Phytocare extract with our higher molecular weight CG-1M grade to create a dual active complex that provides both strong barrier protection and potent hydration replenishment," says Wilson Lim, marketing and regulatory manager, Applechem, "while also rounding out their kit with snow mushroom-based dietary supplements for a true inside-out, microbiome-friendly product line."

Elsewhere, Symrise's Diana Food subsidiary has launched of a line of natural bioactives—collagen type I, vitamins C and A, and polyphenols from various fruits—offering benefits in skin anti-aging, brightening, and hair and nail care. Featured fruits include acerola cherry, which contains bioactive compounds and is one of the richest sources of natural and native vitamin C, which supports skin elasticity. In addition, cranberry, blueberry, aronia, acai, bilberry, blackcurrant and strawberry extracts or juice powders provide natural sources of polyphenols to the line and help prevent skin aging while promoting skin brightening.

On other fronts, O Positiv combats skin-related hormonal issues through superstar, sustainably sourced solutions.

"Our products are carefully formulated with clinically studied, plant-based ingredients," notes Britton. "Flo PMS vitamins call on ingredients like chasteberry to tackle hormonal imbalances and help relieve symptoms like hormonal acne, bloating and more. Meno is formulated with ingredients like KSM-66's ashwagandha and black cohosh to help relieve hot flashes, night sweats and occasional sleeplessness."

Meanwhile, Naomi's OMI Build & Protect WellBeauty Collagen plus Ceramides uses BioCell Collagen in its formula, delivering 1,000 mg of collagen type II per serving to significantly improve the skin's firmness and strength.

"When you look at the competition, most powders are type 1 collagen, and some can get very generic—one would need seven or eight tablespoons to get close to the effect," notes BioCell's Jones. "This is a 500 mg capsule, and the dose is two per day. It's a very pure product and naturally has the bioactives working together to get into the skin."

Keep an eye out for further expansion in the nutraceutical category with these pioneering brands and more, as new market launches are destined to continue through 2023 and beyond. ■



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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Alga, including seaweed, are a sustainable source of new beauty materials, including actives and emulsifiers.

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THE BEAUTY INGREDIENT AGENDA: MAY 2023

DeFrom algae-derived retinoids to materials targeting solar postbiotics, the sustainable palette continues to expand and add unique claims.

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. This month's edition features highlights from the in-cosmetics Global event in Barcelona. Look for an expanded report from the show in our June 2023 edition.

Consumers Want Sustainable Ingredients & Sourcing

NIQ recently reported that 45% of surveyed consumers believe responsible sourcing is among the most important sustainability claims, while 24% want brands to increase their use of ingredients produced in a more sustainable way[a].

Overall, NIQ found that 69% of consumers believe sustainability has become more important to them over the last two years. That said, just 25% say companies and brands are making it easy for them to make sustainable choices.

[a]https://nielseniq.com/global/en/insights/education/2023/sustainable-beauty-2023/



Twenty-four percent of consumers want brands to increase their use of ingredients produced in a more sustainable way.

Fortunately, a spate of recent beauty innovation offers a wide array of ingredient efficacy, sustainability and ethical claims.

Algal Beauty Goes Deep

The ocean offers a vast under-leveraged array of botanical sources for the beauty industry, most notably alga, including seaweed.

Harnessing Sargassum

Recently, Carbonwave closed a $5 million series A funding round led by Mirova's Sustainable Ocean Fund. Carbonwave will use the

proceeds to scale up its conversion of sargassum (brown seaweed) into high-value products such as emollients for cosmetics. Sargassum blooms have recently caused challenges for waterfront communities in Florida, Texas and the Caribbean.

Carbonwave's SeaBalance 2000 (INCI: pentylene glycol, *Sargassum fluitans/natans* extract, xanthan gum) was a big hit at in-cosmetics Global in Barcelona. The seaweed-based cosmetic emulsifier reportedly performs on par with a conventional emulsifier. In addition, the upcycling of each ton of Mexican-harvested sargassum reportedly prevents 450 kg of CO_2e (carbon dioxide equivalent) from releasing into the environment.

The sargassum is rinsed and dried gently after collection, per the company, after which the pulp is processed in the company's plant in Puerto Rico.

The ingredient is hot and cold processable; requires no co-emulsifiers; can hold 10-40% oil; is COSMOS, Ecocert, Greenlife and Clean at Sephora compliant; vegan; and features a pH range of 3.5-9.0. It can be applied in products such as sunscreens, lotions, creams, serums and masks.

Marine Retinoid

Elsewhere, Algativ's RetinArt (INCI: water (aqua) (and) propanediol (and) algae oligosaccharides (and) xanthophylls (and) lactic acid) comprises a bio-retinoid encapsulated in pharma grade liposomes with a marine biopolymer coating for optimized dermal penetration and stability.

RetinArt is obtained from a sustainably sourced wild strain of *Chlorella vulgaris* microalgae, which contains marine apocarotenoids derived from xanthophyll and acts as a structural analogue of retinoic acid. These molecules reportedly bind to and activate a specific acid receptor to remodel the skin without side effects.

A panel of 30 female volunteers aged 40-60 years old and showing visible



A 2022 survey from The Benchmarking Company found that hair growth and hair health (79%) are the primary reasons respondents were taking beauty supplements, followed by the desire for stronger nails (64%).

TOP SKIN CARE INGREDIENT SEARCHES

Consumers are seeking actives to achieve skin care goals, per a recent analysis from Spate[a] (**F-1**). This necessarily highlights materials such as prescription-strength tretinoin and glycolic acid. Meanwhile, awareness of barrier repair and the need for hydration are driving interest in hyaluronic acid, snail mucin and rice.

Among the more novel materials turning up in searches are Ayurvedic favorite chebula, as well as restorative and hydrating materials such as black rice and copper peptides. Meanwhile, hormonal acne concerns can be intuited via the popularity of clascoterone.

F-1. Top-growing ingredient search data for skin care

Example use of **increase** search data: Tretinoin, as searched alongside skin care products, is experiencing an increase of 36.4K searches on average every month since last year.

Trend	Increase↓
tretinoin	36.4K
glycolic acid	28.9K
hyaluronic acid	12.5K
snail mucin	11.4K
rice	11.0K

Source: Spate (US Search Data, ending February 2023)

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

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

signs of photoaging were asked to apply twice a day a hydrogel cream containing 2% Algativ RetinArt on one side of the face and the same base with 0.5% retinol on the other for 56 days. Photoaging and hyperpigmentation parameters were measured after 7, 14, 28 and 56 days of use. Results indicated that the ingredient outperformed the base retinol solution after 56 days in skin firmness, elasticity, wrinkle depth and dark spot reduction, per the company.

Microalge-derived Lifting Effects

Another microalgae-derived technology, DSM's Pepha-Tight CB (INCI: *Nannochloropsis oculata* extract (and) pullulan (and) pentylene glycol (and) citric acid (and) water (aqua)), reportedly delivers immediate and long-lasting tightening and firming effects. The result is smoother appearing skin with a more even texture and a lifting effect that lasts up to 12 hours from application, according to DSM. Long-term regular use of Pepha-Tight brings anti-aging benefits, including a reduction in the appearance of wrinkles.

Algae-derived Waxes, Oils & More

A new player, Upwell Cosmetics, recently launched an algae-derived wax to replace petroleum wax, beeswax and plant-based waxes in cosmetics. The vegan technology is reportedly reef-safe. The company's Upwell Butter, meanwhile, pairs the algae wax and naturally occurring co-compounds of omegas and antioxidants from the source algae.

Upwell Cosmetics also offers an oil comprising fucoxanthin- and essential fatty-acid-rich golden-red algal oil, as well as a moisturizing microalgae extract comprising polysaccharides and proteins.

Beauty from Within

A 2022 survey from The Benchmarking Company found[b] that hair growth and hair health (79%) are the primary reasons respondents were taking beauty supplements, followed by the desire for stronger nails (64%).

[b]*"What Consumers Want from Beauty in 2023,"* www.gcimagazine.com/consumers-markets/news/22512091/what-consumers-want-from-beauty-in-2023



Acerola cherry contains bioactive compounds and is one of the richest sources of natural and native vitamin C, which supports skin elasticity.

Surveyed consumers were also taking supplements for a multitude of skin care reasons, including restoring collagen/firming skin (60%), clear skin/skin health (55%), fine lines and wrinkles (40%), skin hydration (33%), glow/radiance (29%), and for additional anti-oxidant protection (28%).

Furthermore, seventy-six percent of women who already take either a beauty or general health supplement would be interested in taking another for anti-aging/reduction of lines and wrinkles (75%), to boost metabolism (73%), hydration (68%), healthier/shinier hair (68%), building collagen or managing stress (tied at 64%), or supporting weight loss or for healthy skin (tied at 63%).

Recently, Symrise's Diana Food launched of a line of naturally bioactives—collagen type I, vitamins C and A, and polyphenols from various fruits—offering benefits in skin anti-aging, brightening, and hair and nail care. Featured fruits include acerola cherry, which contains bioactive compounds and is one of the richest sources of natural and native vitamin C, which supports skin elasticity. In addition, cranberry, blueberry, aronia, acai, bilberry, blackcurrant, and strawberry extracts or juice powders provide natural sources of polyphenols to the line and help prevent skin aging while promoting skin brightening.

Plant-based, Upcycled Keratin Alternative

BASF Personal Care's Kerasylium is a plant-based alternative to animal keratin upcycled from *Silybum marianum* seed cake, a by-product of French milk thistle oil production. The technology is designed to repair damaged hair and protect it from daily aggressions.

The technology supports ongoing growth in the vegan beauty sector. Recent data estimates that the global vegan cosmetics market will grow from $15.87 billion in 2021 to $24.79 billion in 2028, representing a CAGR of 6.57%.

Kerasylium comprises a micro-complex that is rich in peptides (50-70% of the active matter) that exhibit an amino acid composition similar to that of keratin, a protein naturally present in the hair, which ensures its resistance and elasticity to prevent breakage, particularly in weakened hair.

The ingredient stabilizes and repairs hair keratin, making hair stronger, shinier and softer, per BASF. In addition, Kerasylium reportedly decreases keratin denaturation by protecting the structural proteins of the hair against oxidative stress, while helping to maintain its color for longer.



BASF Personal Care's Kerasylium is a plant-based alternative to animal keratin upcycled from Silybum marianum seed cake, a by-product of French milk thistle oil production.

Sun Care Reinvented

With consumers increasingly cognizant of the need for SPF defense, brands and ingredient firms are challenged to deliver protection and pleasant experiences.

"Skin care terminology and benefits will continue to drive interest in the sun care category," says Arnita Wofford, global marketing and technical director, beauty and personal care, Univar Solutions. "Making the formula work double duty is a welcome response to consumer demand for more and effective multifunctional products. Moisturization, vegan and silicone-free are some trending consumer benefits for sun care formulas; pro-aging benefits are also popular."

However, the rising popularity of mineral sunscreens is creating technical challenges.

"Mineral formulas require you to balance the filter ingredient dosage, even more so than when using traditional chemical filters," says Wofford, "and solubilization can be a challenge. Avoiding white cast, specifically when using non-nano filters and creating an easy to spread texture are the top two issues. Choosing the right emollients and solubilizers that fit with the final brief (vegan, natural, daily wear, sprayable, etc.) will increase the success of achieving both SPF and a desirable texture. Texture preference is of course region-dependent but, generally speaking, quick absorption and moisturization are sought after consumer benefits."

Wofford highlights Parsol TX from DSM as a key solution for many of these issues. The technology has a tight coating of silica and dimethicone around titanium dioxide in order to improve transparency of mineral sunscreen formulations and reduce whitening.

She adds, "The varying particle sizes of zinc oxide in DSM's Parsol ZX, both nano and non-nano, allows for improved transparency as well as improved dispersibility."

Other solutions for safe, effective and sustainable sun care include Sunspheres Bio from Dow, a bio-derived and biodegradable SPF booster that can be incorporated to achieve greater SPF values in both mineral and organic sunscreens, as well as SustOleo DCS from Inolex, a 100% bio-based and palm-free emollient that serves as a solubilizer and disperser for UV filters.

Wofford concludes, "There is no shortage of multifunctional oxybenzone-free sun protection products, especially in color cosmetics. Formulas like BB creams, primers, or foundations in cream or stick formats incorporate mineral UV filters for SPF protection. The Univar Solutions team developed the Strokes of Velvet BB Crayon from our Forever Impressions campaign, which is an oxybenzone-free BB stick with SPF."

Enhancing UV Protection & Texture

Elsewhere on the sun care ingredient front, BASF's Tinomax CC is designed to enhance sun care benefits through homogeneous particle shaping. In formulations, the technology reportedly lengthens UV protection with SPF and improves UVA protection. Furthermore, it reportedly reduces the stickiness and greasiness of sun care formulations.

Zinc Oxides for Skin Care, Makeup & More

Ultra chemical's EverCare/EverZinc Zano portfolio consists of several grades of zinc oxide designed to enhance UVB and UVA defense and transparency. The natural, photostable, non-penetrating powders come in coated and non-coated forms for skin and color cosmetics and sun care.

Zano M Uncoated Zinc Oxide (INCI: zinc oxide) offers high levels of UVA

protection, a critical wavelength of 385 nm and good transparency, while Zano 20 Uncoated Zinc Oxide (INCI: zinc oxide) offers high levels of transparency, while still offering sufficient UVA protection to pass international UVA guidelines and criteria. It features a critical wavelength of 371 nm. Zano 10 Uncoated Zinc Oxide (INCI: zinc oxide) offers the best balance between highest broad-band UV protection and transparency in the line; critical wavelength: 373 nm.

Zano 20 PlusSurface (INCI: zinc oxide (and) triethoxycaprylyl silane) is a treated zinc oxide that offers high levels of transparency, while still offering sufficient UVA protection to pass international UVA guidelines and criteria; critical wavelength: 371 nm. Zano 10 PlusSurface (INCI: zinc oxide and triethoxycaprylyl silane) is a treated zinc oxide that also offers a balance between high broad-band UV protection and transparency; critical wavelength: 373 nm. Finally, Zano M PlusSurface (INCI: zinc oxide (and) triethoxycaprylyl silane) is a treated zinc oxide that offers high levels of UVA protection and provides a critical wavelength of 385 nm, while maintaining good transparency.

Ultra Chemical also recently began distributing EverCare's Assure+ (INCI: *Pongamia pinnata* seed extract), a high-purity extract that boosts properties of SPF and UVA-PF by 20-40%. According to EverCare, Assure+ also increases both SPF and UVA-PF values when used in mineral-only and hybrid sunscreen formulations.

Skin Stress-reducing Emulsifier

Gattefossé has launched the plant-based Emulium Dermolea MB O/W emulsifier, rich in sterols and triterpenes, which can reduce skin stress and deliver long-term soothing in sun care and other product types.

Composed of candelilla, rice bran and jojoba waxes, the ingredient creates a skin-compatible shield to protect surface lipids from environmental stress, which can negatively impact barrier function and thereby increase transepidermal water loss (TEWL). That loss results in dry, reddened skin that experiences a stinging sensation, as well as a burning sensation upon application of cosmetic products.

Available in pellet form, Emulium Dermolea MB's plant lipid composition is similar to that of the skin's surface and is reportedly rich in anti-inflammatory pentacyclic triterpenes and sterols. In formulations, it can emulsify oil phases up to 40% and create everything from thin sprays to thick butters. It is thereby suitable for skin care, sun care, makeup and hair/scalp care.



"Skin care terminology and benefits will continue to drive interest in the sun care category," says Arnita Wofford, global marketing and technical director, beauty and personal care, Univar Solutions. "Making the formula work double duty is a welcome response to consumer demand for more and effective multifunctional products."

Combatting Solar Postbiotics

Vytrus Biotech's Photobiome (INCI: *Gossypium herbaceum* (cotton) seed extract (and) *Punica granatum* seed extract (and) glycerin (and) trehalose (and) pentylene glycol (and) fructooligosaccharides (and) water (aqua) (and) phytic acid) is a prebiotic antioxidant that harnesses the sun-microbiota-skin axis. The technology targets the interaction of microbiota with the sun's radiation, which can produce so-called solar postbiotics that can cause photoaging. By delivering beneficial molecules to counter these solar postbiotics, Phtobiome can reportedly prevent the effects of photooxidative stress.

The ingredient's beneficial components include pomegranate cell cultures, rich in selective cell membrane lipids such as phospholipids, glycolipids, glycerides and free fatty acids. It also comprises a polyphenol fraction (plant chromophores), particularly ellagic acid, as a precursor of urolithins.

Meanwhile, the cotton culture in Photobiome comprises a cell lysate rich

in protective cellular factors, including plant chromophores and antioxidant, anti-inflammatory and photoprotective polyphenols such as gentisic, salicylic, p-coumaric, transferulic, caffeic and kaempferol acids, quercetin, and rutin. The company notes the two plant cell cultures have also been enriched with two plant-derived sugars that reportedly play a key role as protectors and strengtheners of microbial cell membranes.

Photobiome is recommended for anti-wrinkle products to treat the crow's feet and eye contour areas, and is said to improve skin firmness and elasticity. It can also be used as a preventative active in antioxidant and sun care repair formulas.



Lubrizol's SilSense Bio 5 emollient is a naturally derived, biodegradable, pure and volatile emollient that can serve as a silicone alternative to cyclopentasiloxane D5.

Sustainable Emollient Alternatives

Among the many launches at in-cosmetics Global 2023, a large portion boasted biodegradability credentials and/or served as alternatives to conventional materials.

One technology that comprises both is Lubrizol's SilSense Bio 5 emollient (INCI: C9-12 alkane), a naturally derived, biodegradable, pure and volatile emollient to be used as a silicone alternative to cyclopentasiloxane D5. The technology can be applied in leave-on applications with similar performance and sensory feel to silicone formulations. SilSense Bio 5 is reportedly suitable for makeup, skin care, sun care, hair care and hair color.

Meanwhile, Clariant's Plantasens Pro LM natural emollient delivers moisture in skin care and is designed to combine well with UV filters and pigments. It also offers skin benefits across a range of sun care and color cosmetic application areas, allowing for formulators to create sunscreens and makeup formulations that deliver moisturization and hydration. It is also 100% natural, readily biodegradable and COSMOS and Natrue certified.



Arcaea's ScentArc is a prebiotic active comprising a nutrient blend that prevents the production of odor-causing bacteria.

Prebiotic Deodorant Active

Arcaea has launched ScentArc, a prebiotic active for deodorant performance. The ScentArc technology comprises a nutrient blend that prevents the production of odor-causing bacteria, such as *Corynebacterium* sp. and *Staphylococcus hominis*, which are found in the axillary area. ScentArc reportedly prevents malodor all day without harming helpful bacteria, irritating the underarm or clogging pores.

A 30-person panel applied the product (formulated into an unscented stick) once daily after a three-day wash-out period. Among the subjects, 87% said the technology prevented bad smells from developing throughout the day and 100% said they found the product to be gentle and non-irritating

Jasmina Aganovic, CEO of Arcaea, commented, "Our mission is to make biology the most desired technology in beauty. When it comes to the $25 billion deodorant category, the underlying science relies on approaches developed in the 1800s: masking smells, killing odor, or blocking and absorbing sweat. We saw a better solution through biology using technologies that didn't exist until recently."

A New Mode of Pore Minimizing

CLR's CutiFine CLR (INCI: *Vaccaria segetalis* (cowherb) extract, *Adansonia digitata* (baobab) pulp extract) addresses cell biological processes that contribute to skin pores becoming more conspicuous. CutiFine CLR targets the dermal compartment around the hair follicle, giving it structural support, thereby keeping pores small, per the company. Additionally, pore size is addressed by reducing the hyperproliferation of follicular keratinocytes, an important factor in people suffering from oily and combination skin.

In clinical studies using the AEVA-HE2 technology—a high-resolution 3D scanning sensor for the measurement of the shape and skin relief in vivo—it was shown that the number of detectable pores, their surface area, circumference and volume were reduced when exposed to the ingredient technology. Furthermore, the effectiveness of CutiFine CLR could also reportedly be confirmed by the volunteers who took part. After 28 days, more than 80% of the volunteers reported a reduction in the appearance of conspicuous pores. ■



CLR's CutiFine addresses the cell biological processes that contribute to skin pores becoming more conspicuous.



PACKAGING INNOVATION TREND TRACKER

From unique glass shapes to multifunctional skin care and makeup applicators to PET reinventions, we break down the latest innovations for beauty.



ICS' Mono Material PP Pump is available in two neck sizes (24/410 and 28/410) and can be matched with bottles of various fill sizes and shapes; the company also offers Metal Free Airless Bottles available in 15 ml, 30 ml and 50 ml variants and with TPE or silicon springs.

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Recent NIQ data[a] has found that 69% of consumers believe sustainability has become more important to them over the last two years. However, 25% say companies make it difficult to make sustainable choices. Sustianable packaging represents one critical way to allow shoppers to make decisions based on their values. A recent survey of the latest innovations on the market reveals a wide array of options available to brands.

Monomaterial: from Skin Care to Makeup

Monomaterial designs allow brands to simplify recycling for consumers while rendering color matching more consistent for brands. Suppliers are responding to the demand with a range of options across segments.

For example, ICS' Mono Material PP Pump is available in two neck sizes (24/410 and 28/410) and can be matched with bottles of various fill sizes and shapes. The pumps are reportedly ideal for skin care, body care and hair care formulations. (ICS also offers Metal Free Airless Bottles available in 15 ml, 30 ml and 50 ml variants and with TPE or silicon springs.) The company also offers monomaterial PP pencils, PP refillable jars and aluminum lipsticks, the latter available in standard 12.7 mmD cup and slimline 11.1 mmD cup. Both variants are available with a flat and slant A-shell.

Eliminating Secondary Packaging

Some products may benefit from the elimination of secondary packaging. In addition to the use of fewer materials, which has both cost and sustainability benefits, brands without secondary packaging may find they have stronger product visibility on-shelf, while allowing shoppers to see what they're actually paying for. Epopack's PET heavy wall packaging is designed to allow brands the product durability they need while allowing brands to save on space, materials and cost, per the supplier.

Sustainable Minis

Quadpack's Regula Petit Jar brings sustainable design to the mini-sizes beauty trend, which highlights convenient, affordable and cute formats. The thick-walled Regula Petit Jar comprises fully recyclable PET and is offered in a recycled version. The PP cap is also recyclable.

Manufactured in Germany, the pack is offered in 15 ml and 30 ml capacities, making it appropriate for lips, eyes and other specific face areas, as well as for on-the-go usage, ideal for a time of rising travel activity.

A lifecycle assessment of the Regula Petit Jar in recycled PET reportedly shows a 31% reduction in carbon emissions when compared to the virgin PET version. The PCR PET jar's circularity index is also 3.5 times better compared to the conventional version.

Sustainable Barrier Coating for Flexible Packaging

Israel-based Melodea, a producer of sustainable plant-based barrier coating products, has launched VBseal, a green coating solution that is resistant to water vapor, oil and aroma and which has heat-sealing properties.

VBseal is designed to line packaging and is fully recyclable; its multifunctionality means there is no need for two different passes to achieve water vapor protection and heat sealing.

The technology is free of paraformaldehyde (PFA) and bisphenol A (BPA) and is FDA and BfR-compatible, per Melodea.

The company has opened a pilot plant and innovation center to demonstrate the new solution, which is applicable to the cosmetics sector. The new site will also test out existing barrier coating products and produce coated reels and pouches at pilot scale.



Verescence's Moon (pictured) and Gem lightweight glass bottles with complex shapes were developed in collaboration with designer De Baschmakoff.

[a]https://nielseniq.com/global/en/insights/education/2023/sustainable-beauty-2023/



ICS offers a monomaterial PP pencil.



ICS' aluminum lipsticks are available in standard 12.7 mmD cup and slimline 11.1 mmD cup.



Quadpack's Regula Petit Jar brings sustainable design to the mini-sizes beauty trend, which highlights convenient, affordable and cute formats.



Epopack's PET heavy wall packaging is designed to allow brands the product durability they need while allowing them to save on space, materials and cost, per the supplier.

In particular, the new center will serve companies across the packaging value chain in exploring sustainable barrier solutions in plastic, paper and bioplastics.

Sustainable Pet Care Project

Seacliff Beauty recently developed sustainable packaging solutions for three summer 2023 launches for pet care brand Floof. The Floof Soothing Cream is housed in a round PU tube with octagonal PP cap with custom color sleeve in a matte finish and two-pass silk screen (glossy and satin), as well as an octagonal PP cap molded in glossy black. The Floof Nourishing Dog Shampoo & Conditioner, meanwhile, is housed in an aluminum bottle with a lock-down pump sprayed in a custom color with a matte finish and two-pass silk screen (glossy and satin).

Double Wall Glass Jar

APC Packaging's new Double Wall Glass Jar features a heavy glass outer jar and a customizable PP inner jar and cap. The jar is available in 30 ml and 50 ml capacities. The jar features a PP inner jar and cap. The glass outer jar allows for a wide range



APC Packaging's new Double Wall Glass Jar features a heavy glass outer jar and a customizable PP inner jar and cap.



Israel-based Melodea, a producer of sustainable plant-based barrier coating products, has launched VBseal, a green coating solution that is resistant to water vapor, oil and aroma and which has heat-sealing properties.



Floof is launching three products in the summer of 2023, featuring packaging by Seacliff Beauty.

of decoration options and provides a high-end feel, per the company.

New Refillable and Glass Packaging Options

Baralan has introduced 30 ml and 50 ml inner cups for its refillable Maria Jar series. The supplier is also expanding the Raquel range with a series of square-shaped glass jars. The jars' geometric shape features a square design with slightly rounded sides, which makes it easier to grip and open while also delivering a modern, sleek appearance. The jars can accommodate either a cylindrical cap or a cap with the same shape as the jar.

Elsewhere, Verescence's Moon and Gem lightweight glass bottles with complex shapes were developed in collaboration with designer De Baschmakoff. The Moon bottle, featuring an organic shape and off-center neck, weighs 106 g for 100 ml. The design preserves the symmetry of the bottle's faces, offering a comfortable grip. The Gem bottle, meanwhile, weighs 97 g for 100 ml. The geometrical design features gemlike sharp angles and a broad octagonal facing. Both bottles are refillable (SNI 15 screw neck) and are personalized with a spherical monomaterial LegnaPin cap made by Minelli Spa (mPackting).

Swapping in PET

Epopack has discontinued its A33 series products, which were made in AS/SAN material; new versions will be available in the fourth quarter of 2023, featuring PET. The transition to PET boosts packaging durability





Baralan is expanding the Raquel range with a series of square-shaped glass jars.



Baralan has introduced 30 ml and 50 ml inner cups for its refillable Maria Jar series.



UFlex's Kraftika paper tube range features Forest Stewardship Council-certified virgin kraft paper that reportedly reduces the tube's body weight by as much as 45-50%.



Texen's recent Rainbow Collection features the Double Lips, featuring a solid formula and a foam applicator, as well as the Double Brush, featuring a stainless steel ball to prep the skin with a massage, thereby activating microcirculation, as well as a formula applicator.

and chemical (acid) resistance, per the company, rendering the designs compatible with most beauty products. At the same time, PET packaging boasts the international recycle code number 1.

Kraft Paper Tubes

As seen at the 2023 Cosmoprof Bologna show, UFlex's Kraftika paper tube range features Forest Stewardship Council-certified virgin kraft paper that reportedly reduces the tube's body weight by as much as 45-50%, compared to comparable conventional alternatives. The tubes feature moisture resistance (laminate options include plastic barrier and aluminum barrier variants) and high burst strength, per UFlex, and sufficient stiffness to provide adequate bounce back properties. This prevents the collapse of the tube after even continued use and depletion of contents. The designs are reportedly appropriate for face washes, oral care, gels and creams.

Multifunctional Eco Designs

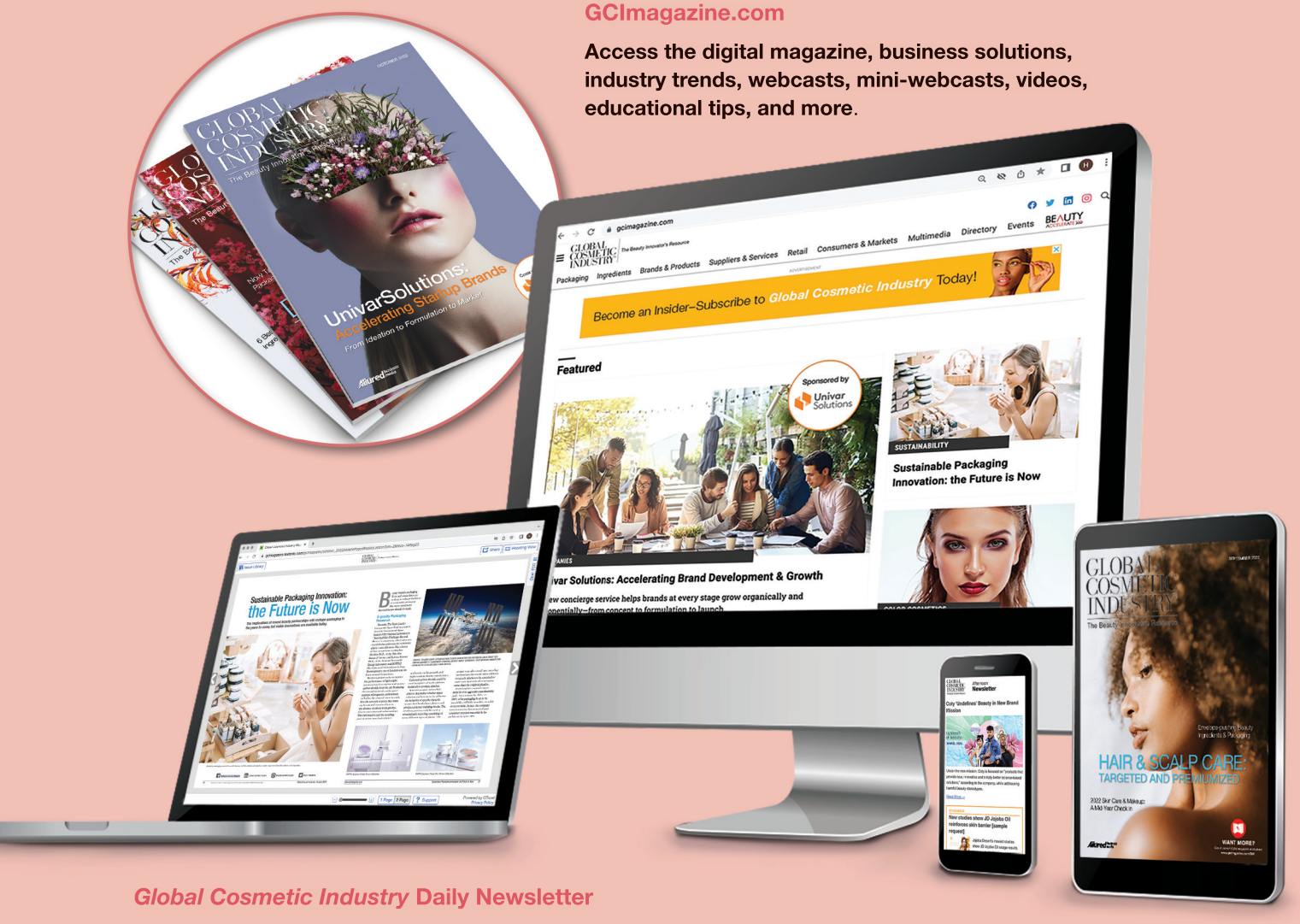
Texen's recent Rainbow Collection features eight eco-designed accessories for skin care and makeup, including Double Eyes, featuring a beveled tip on one end to highlight the edge of the eyelid and, on the other end, a tip that corrects and sharpens the line; the Double Lips, featuring a solid formula and a foam applicator; the Double Face, which dispenses loose powder and fixes it in place with its foam tip; and the Double Brush, featuring a stainless steel ball to prep the skin with a massage, thereby activating microcirculation, as well as a formula applicator. ■

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