SEPTEMBER 2023

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Top Beauty
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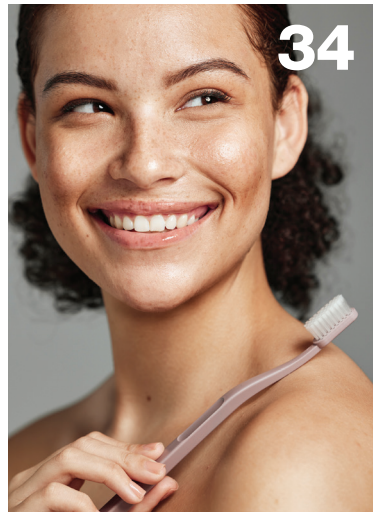
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Premiumization & Omnichannel: Beauty's Next 4 Years



The fragrance and makeup sectors are the top drivers for the premiumization of beauty across the globe.

By 2027, the global beauty industry is forecast to be worth $580 billion, representing a 6% annual growth rate, per a recent McKinsey analysis[a]. Africa and the Middle East will represent the fastest growth, 12% annually, while China and North America will see their markets reach a value of $96 billion and $114 billion, respectively, by the end of the forecast period.

Growth rates across categories—makeup, hair care and skin care—will be virtually identical, while fragrance will expand slightly faster, at 7% annually. This places beauty in line or slightly ahead of other consumer product categories.

But these numbers only tell part of the story. As uncovered by Q1 data from Circana in the United States[b], beauty's future will be defined by premiumization, with the upper tier sales expanding at 8% per year, compared to 5% for mass beauty. The fragrance and makeup sectors are the top drivers for this trend, though in the U.S. market hair care has been significantly impacted by premiumization. Meanwhile, the top of the market, luxury beauty, could double from $20 billion in 2023 to $40 billion by 2027.

The financial stakes are immense, but success in today's booming, competitive beauty market is far from guaranteed. Brands need smart science, sustainable innovation, a broad palette of impactful ingredients, differentiating formulations, and trusted innovation partners. In response, our cover sponsor, Croda, has continuously evolved its services and technologies to meet the challenges and demands of today's industry, including natural and sustainable ingredients, full-service innovation for indie brands, on-trend formulations across key categories, and much more. Turn to **Page 10** to read our in-depth report, "**4 Keys to a Total Beauty Solution**."

[a]www.mckinsey.com/industries/retail/our-insights/the-beauty-market-in-2023-a-special-state-of-fashion-report

[b]www.gcimagazine.com/consumers-markets/news/22847175/q1-2023-us-beauty-sales-driven-by-lips-prestige-fragrance-clinical-skin-care-more; www.npd.com/industry-expertise/beauty/



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Featured insiders…

- BASF
- Derprosa
- Evonik
- Integrity Ingredients Corp.
- Neenah
- Nutrition21 LLC

Consumers continue to seek out hair care and oral care products that are not only good for them, but for the environment.

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INSIDER INSIGHTS:

WHAT'S TRENDING: PACKAGING TRENDS IN BEAUTY + HAIR CARE & ORAL CARE INGREDIENTS

Multi-beneficial and natural ingredients, as well as sustainability are at the forefront of these categories.



Packaging for beauty remains committed to leaving a positive footprint on the environment.

Global Cosmetic Industry spoke with beauty insiders to highlight recent packaging trends, as well as new launches.

Sustainability Leads Packaging in Beauty

Jennifer Dietz, senior product manager, folding board and box wrap, Neenah, says, "In the beauty packaging industry, several trends are emerging to promote sustainability and environmental responsibility. Brands are increasingly regionalizing their packaging and manufacturing processes, with Euro brands selling in the [United States] seeking local sourcing of substrates to reduce transportation emissions. Carbon neutrality is a key focus, leading to enhanced monitoring of materials, energy usage and transportation in bringing products to market. Moreover, there is a noticeable transition from plastics to more eco-friendly and flexible materials like folding boards, boxes, and mailers, contributing to waste reduction. The industry is actively

eliminating non-sustainable elements such as magnets, laminates and glues from packaging solutions to further enhance their ecological impact. Additionally, there are new innovations around sustainability. Consumers are interested in new ideas that support the broader topic, and savvy brands are making their sustainability mission a visible part of their brand. Some examples are the creation and promotion of repurposable packaging, both primary and secondary. Creating a beautiful box or jar that can be used for another purpose adds a level of intrigue and excitement to the packaging, making the product more desirable and justifiable in the consumer's eye. These trends indicate a significant commitment towards a greener and more sustainable future in beauty packaging."

Dietz continues, "Neenah has recently expanded our Neenah Folding Board portfolio to include a new 16 pt. caliper in addition to our 18 pt. and 24 pt., in our two top colors, Bright White and 100 PC White. This enables brands to specify the same stock for their small, medium and large items. We continue to see growing use of premium, uncoated folding boards, especially the 100 PC White, as it checks all the boxes: premium press performance, FSC certified, 100% PCW, bright clean white."

Sarah Chen, marketing and communications manager, International Cosmetic Suppliers, says, "At ICONS|ICS we continue to see a steady demand for beauty packaging where form meets function and sustainability as the bare minimum. We also see a high demand for packaging that helps consumers embrace skinification and skinimalism trends—they don't want wasteful and gimmicky products. This means brands are launching more multi-purpose, hybrid formulations as more consumers adopt a less is more lifestyle. As a result, we are seeing an increase in demand for metal-free and mono material pumps, in both airless and diptube pump styles and in recycled materials. ICONS|ICS is committed to helping brands adopt a circular approach to packaging to meet their sustainability goals."



International Cosmetic Suppliers' mono-material PP diptube pump is both recycled and recyclable.

Chen continues, "Our monomaterial PP diptube pump can be paired with a wide range of bottles with a neck size of 24/410 and 28/410. It is available with either a smooth or ribbed collar and comes in various actuator styles. In terms of sustainability, this pump is 100% PP and can add PP PCR in the collar and actuator, making it both recycled and recyclable."

Sherry Marvin, director of brand owner/end user sales, Derprosa, says, "One trend is that the industry is focused on how to produce a more sustainable product and product packaging [and] how to continue to strive for unique packaging that will attract consumers and set them apart from other cosmetic companies."

Marvin continues, "Derprosa reLIFE is Taghleef Industries' version of laminating films that use ISCC recycled plastic, from post-consumer source and allocated using the mass balance approach, thus promoting the circular economy and less use of fossil-based resources. Derprosa reLIFE 30 solution contributes to the replacement of newly produced plastics in the manufacture of films for laminating paper and cardboard in graphic arts projects, with Derprosa reLIFE 30, we keep the value of plastic waste in the loop by using 30% ISCC recycled plastic, allocated using the mass balance approach, thus contributing to keep waste off the environment. Nowadays, in a world more concerned about the environment and the mark that we leave in the future, sustainability is a must in any kind of product or packaging. The customer is not looking only for a luxury product, is looking for it being sustainable. In the previous months, we presented the new line of our Derprosa reLIFE 30 products in a format consisting of a showcase box with four smaller boxes laminated each one with our four reLIFE products: Derprosa Gloss Premier reLIFE 30, Derprosa Matte Premier reLIFE 30, Derprosa DL Soft Touch Prestige reLIFE 30 and Derprosa Matte DL Pro-Shield reLIFE 30." ■

ORAL CARE: CONSUMER PREFERENCES

| BY JOSEPH SHEIH, global marketing director hair care and cleaning, Evonik

The oral care application market is witnessing several notable trends driven by evolving consumer preferences on top of basic functional requirements such as cleansing. Firstly, there is a growing demand for natural and organic ingredients in oral care products. Product safety is often an important claim along this trend as consumers are increasingly seeking oral care products that avoid synthetic or potentially harmful substances. Those demands led to the blossoming of biotech and fermentation-processed ingredients in oral care. Sustainability is a crucial aspect of the oral care industry, given its significant environmental and social implications. The manufacturers in the oral care sector are fully committed to implementing a range of sustainability measures aimed at reducing their carbon footprint and minimizing environmental impacts. These manufacturers understand the importance of utilizing eco-friendly ingredients and are actively striving to create a more sustainable future. They prioritize ingredients that offer high performance and multifunctionality while being readily biodegradable. Additionally, they focus on optimizing energy consumption during the manufacturing process. By adopting such sustainable practices, oral care manufacturers help consumers to make sustainable purchasing decisions.

Moreover, consumer preference for oral care products with pleasant flavors has gained significant importance. Consumers now have heightened expectations for taste experiences that enhance their overall oral care routine. This shift in demand has led to a surge in the introduction of alcohol-free oral care products, as manufacturers strive to cater to consumer preferences. Consequently, there is a growing need for innovative surfactant and solubilizer solutions to meet these demands and create unique flavor experiences that resonate with consumers. The market has witnessed a rise in product launches focused on delivering better consumer experiences, emphasizing the significance of continuous innovation in this area.

As a leading global manufacturer of eco-friendly biosurfactants, Evonik remains committed to innovate in the field of glycolipids biosurfactants. After the successful launch of the Rheance One glycolipid product platform, we expanded our glycolipid portfolio and introduced Sophance LA-A (INCI: Glycolipids (and) sodium lactate) at in-cosmetics Global 2023. Sophance LA-A is a mild, acidic-rich sophorolipid, produced through the fermentation of natural feedstocks. This unique glycolipid offers high cleansing performance for personal hygiene applications while being gentle on the eyes, skin, and mucous membranes. It has excellent sustainability credentials and is ideal for oral care applications due to its nature-identical structure, lower carbon footprint, biodegradability and low aquatic toxicity. Furthermore, Sophance LA-A is preserved with a label-friendly preservative, sodium lactate. Sophance LA-A not only aligns with the natural and sustainability trends preferred by consumers but is also highly praised by formulators for its effectiveness. In addition to its mild cleansing properties, this glycolipid offers multifunctionality and could be a suitable replacement for wetting agents and additive solubilizers for ingredients such as flavors and actives, especially in alcohol-free mouthwashes. For oral care applications, Sophance LA-A is best suited for mouthwash formulations, while Rheance One is ideal for toothpaste formulations due to its superior foaming properties. These two glycolipids can be used together to customize the foaming profile and taste of the final product. ■

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3 Hair Care Ingredient Trends

Hair care products continue to reflect the evolving market.



BASF's Euperlan NL Pearl, created for hair care needs, features naturally derived ingredients such as hydrogenated vegetable oil, cocamidopropyl betaine and glycerol oleate.

Natural & Sustainable Ingredients

Andrew Miller, marketing manager—hair, body and oral care, North America, BASF, says, "There has been a growing demand for hair care products formulated with natural and sustainable ingredients. Consumers are increasingly concerned about the impact of synthetic chemicals on their hair and the environment. Ingredients such as plant extracts, essential oils, and botanicals have gained popularity due to their perceived gentler and eco-friendly nature. Biopolymers for styling and rheology have also been quite popular. APG's continue to serve as a mild and gentle yet effective plant-based surfactant. Proteins are also providing a natural sourcing story and strengthening benefits to hair formulations."

Miller continues, "Euperlan NL Pearl is composed of the naturally derived ingredients such as hydrogenated vegetable oil,

cocamidopropyl betaine and glycerol oleate. Approved by COSMOS, Euperlan NL Pearl offers a high-performance alternative to non-COSMOS-approved ingredients and allows you to address consumers' demand for opacifying and pearlizing effects without using pigments. It shows outstanding attributes in hair care applications, especially on wet and dry combing tests, anti-hair breakage measurements and suppleness tests. It is biodegradable and suitable for EO and sulfate surfactant-alternative solutions. It is easy to formulate and cold processable. Formulations for shampoos, body wash, and shower gel developed with Euperlan NL Pearl allow a natural-origin content of up to 99% according to ISO 16128, depending on other ingredients."

Katie Emerson, MS, RD, LDN, manager of scientific affairs at Nutrition21 LLC, says, "We are noticing an intense interest in natural hair care ingredients that work. The shift we are seeing is that consumers are testing products and promoting results (or lack thereof) real-time in places like TikTok and Instagram, with users sharing before-and-after experiences with products. Natural plant extracts rosemary, mint, saw palmetto are popular herbals for hair, and some have even been tested in clinical trials. While the data are still emerging, the initial results show exciting promise for herbals in helping support hair growth."

Emerson continues, "In the first half of 2021, Lustriva was introduced into the market and in the past six months we are beginning to see new products with Lustriva entering the market. Nutrition21's Lustriva is a complex that combines two unique forms of established beauty nutrients—bonded arginine silicate and magnesium biotinate. These one-of-a-kind forms of silicon and biotin are highly bioavailable and are easy to formulate with. In fact, Lustriva's versatility allows it to be added to a multitude of applications like capsules, tablets, powders, ready-to-drink beverages and gummies. Clinical substantiation is a huge differentiator for the hair-care market. Consumers want proof that their beauty ingredients will have a measurable impact on their appearance, especially when it comes to their hair. For Nutrition21's Lustriva ingredient, it has been clinically shown to significantly increase the growth of thicker hair by nearly 20% in just three weeks."

Skinification

Miller says, "The skinification trend emphasizes treating the hair and scalp as an extension of the skin on the face. The scalp is seen as an important foundation for healthy hair growth, and just like the skin on our face, it can benefit from gentle exfoliation, moisturization, and protection from environmental stressors. Hair and scalp care products may contain ingredients like alpha hydroxy acids (AHAs) or beta hydroxy acids (BHAs) to gently exfoliate the scalp, removing dead skin cells and promoting a healthier environment for hair follicles. Similar to facial serums, hair and scalp serums are designed to deliver targeted active ingredients to address specific scalp concerns, such as dryness, flakiness or sensitivity. Hair care products that offer multiple benefits, such as providing UV protection for the scalp, antioxidants to combat environmental damage, and anti-inflammatory properties to soothe irritation, align with the skinification trend. Additionally, hair care products formulated with ingredients to shield the hair and scalp from pollution, just like the



anti-pollution products available for skin care, have gained popularity."

Emerson says, "Consumers are also looking for products that are good for the look/feel of hair, but also for a healthy scalp. More specifically, they are seeking out ingredients—both topical and ingested—that promote hair health inside and out. Of course, other trends like tapping into the hair microbiome, choosing vegan ingredients, and paying attention to sustainability are also part of the hair care story as we approach 2024."

Ancient Beauty Rituals With Modern Botanicals

Natalie DiLallo, vice president of marketing and strategic planning, Integrity Ingredients Corp., says, "Prior to the pandemic, various international fashion magazines were featuring articles about beauty treatments that can be traced back over centuries are growing in popularity once again. They cited rosewater from Turkey and Turmeric from India and other rituals from ancient countries around the world such as Egypt, Rome and Greece. Today, there is a consumer segment that has embraced these beauty treatments, and many have crossed over into the nutritional category such as turmeric powder extract, but also in the mind and body wellness space. We at Integrity Ingredients see as a developing trend, ancient, long held beauty regimens that are significantly enhanced by pairing them with different botanicals and new technologies. At Integrity Ingredients Corporation (IIC), we see this as a growing trend for both skin and hair care products stemming as a subset from the clean and natural space. Ancient beauty routines combined with the power of unique botanicals and technologies can harness compelling blends that not only nourish and strengthen the hair and scalp, but also provide a relaxing and therapeutic wellness experience for the mind. At IIC we've explored some unique and interesting hair care botanical extract blends and their applications based on century old hair care routines that achieve mind, scalp and hair wellness."

Integrity Ingredients Corp.'s BTC Restoring Tranquility Complex, BTC-0022-WG50, features lavender, which has been used for centuries to promote relaxation and reduce stress. When combined with rosemary extract and its new, proprietary Coffee Oil, the blend helps to improve circulation and stimulate hair follicles. Coffee Oil has reportedly been clinically proven to help repair split ends. Chamomile, renowned for its soothing effects on the scalp, not only revitalizes the hair but also provides a tranquil and therapeutic experience during hair care routines. The aromatic properties of these extracts create a spa-like atmosphere that helps calm the mind and alleviate tension.

The company's BTC Uplifting Equilibrium Blend, BTC-0029-W, features rosewater, a staple in ancient beauty rituals that is revered for its hydrating and balancing effects on the hair and scalp. When combined with hibiscus, the blend becomes rich in natural AHAs that promote scalp health and hair growth. With the addition of the mood-lifting and stress-reducing properties of geranium extract, this blend offers a harmonious combination that restores balance to both the hair and the mind. Spritzing this mist provides an uplifting and refreshing experience, benefiting overall well-being. ■



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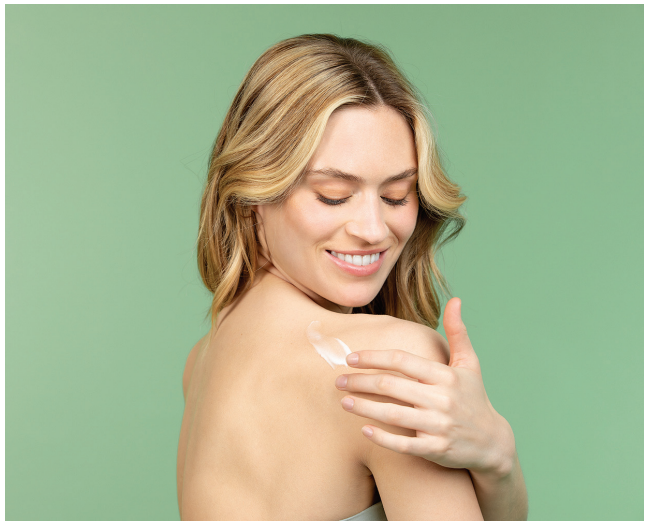


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cosmopak is thrilled to announce the release of its new 2023-2024 packaging collection, "rooted in beauty." This comprehensive collection showcases an array of sustainable packaging options, aligning with cosmopak's commitment to environmental responsibility and its recently introduced eco forward framework.



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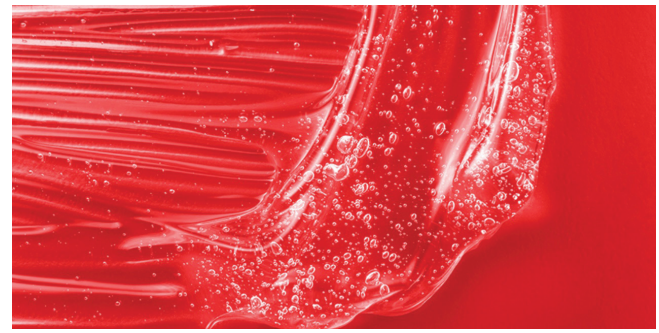


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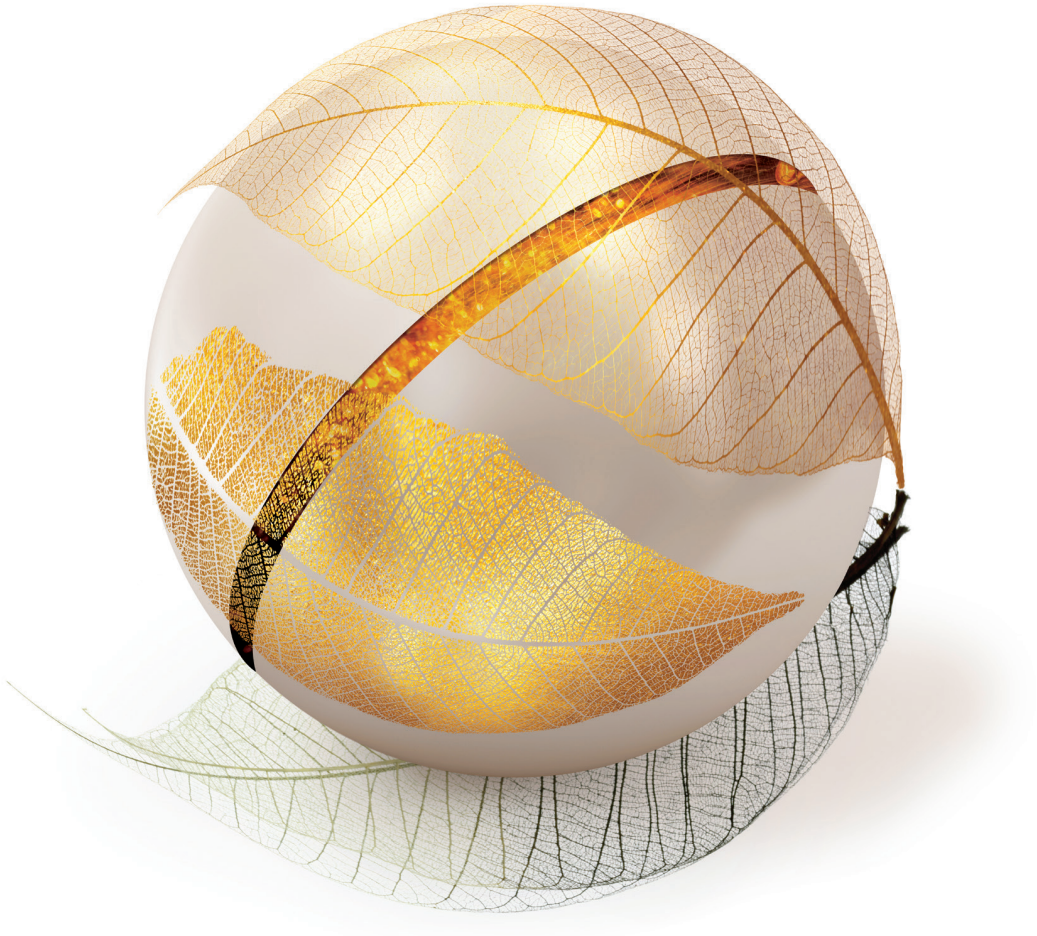
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To win in today's booming, competitive beauty market, brands need smart science, sustainable innovation, a broad palette of impactful ingredients, differentiating formulations, and trusted innovation partners.

4 Keys to a Total Beauty Solution

From sustainable ingredients to smart science to innovation services, Croda is optimized for a fast-moving market.

To win in today's booming, competitive beauty market, brands need smart science, sustainable innovation, a broad palette of impactful ingredients, differentiating formulations, and trusted innovation partners. In response, Croda has continuously evolved its services and technologies to meet the challenges and demands of today's industry. Here are four ways the company is pushing beauty into new territory.

1. Taking indie brands from concept to shelf

Indie brands are known for their innovative, thoughtful concepts, but they also require innovation partners that can successfully take them from concept to shelf. With extensive expertise in specialty ingredients and chemical innovation, Croda aims to empower indie brands to create exceptional products that meet their unique needs. Here are a few ways in which Croda can assist indie brands in formulation development:

- ***Ingredient expertise:*** Croda provides access to a diverse portfolio of high-quality specialty ingredients (see "Cross-category innovation: hair, skin & sun care") that can enhance the performance, functionality and sustainability of indie brand formulations. The company's team of experts can help indie brands select the most suitable ingredients for their specific product goals.
- ***Formulation support:*** Croda offers technical guidance and assistance throughout the formulation process

(see "Inspiring formulation expertise"). Its experienced chemists can collaborate with indie brands to optimize formulations, troubleshoot challenges, and ensure compatibility and stability of ingredients.

- ***Regulatory compliance:*** Navigating the regulatory landscape can be complex for indie brands. Croda can provide valuable support in understanding and meeting regulatory requirements, ensuring that formulations comply with relevant safety, environmental, and labeling standards.
- ***Collaboration and education:*** Croda fosters a collaborative approach by engaging in knowledge-sharing activities and providing educational resources. It organizes workshops, webinars and seminars to equip indie brands with the latest formulation techniques, industry insights, and market trends. Croda also offers e-books specifically catered to indie brands, including the recently launched e-book[a], "Everything you need to know about formulations for indie beauty brands."

By leveraging Croda's assistance in formulation development, indie brands can benefit from Croda's comprehensive support network and enhance their product offerings, market competitiveness and overall success.

2. No-compromise sustainability

Croda is meeting the rising brand, consumer and retailer demands for sustainable products by investing in innovation, product design and flexible operations, while also collaborating with its supply chain to develop personal care ingredients that offer greater benefits while minimizing their environmental footprint.

Renewable, bio-based surfactants

Croda's ECO Range of 100% renewable, 100% bio-based, vegan and cruelty-free surfactants perfectly illustrate the company's approach to sustainability[b]. The range substitutes EO (ethylene oxide) with bioethanol sourced from renewable biomass (RSPO supply chain certified via Mass Balance). This approach to production significantly elevates the bio-based content of ethoxylated products while reducing the company's dependency on fossil fuels. Additionally, all ingredients in the low-1,4-dioxane ECO Range are manufactured using renewable energy, without compromising on performance compared to traditional petroleum-based options. The USDA-certified biobased ECO Range therefore ensures brands no longer need to make a tradeoff between achieving their sustainability objectives and delivering high-performance products to their consumers.



Navigating the regulatory landscape can be complex for indie brands. Croda can provide valuable support in understanding and meeting regulatory requirements, ensuring that formulations comply with relevant safety, environmental, and labeling standards.

Growing biotechnology & natural ingredient expertise

Croda's ongoing investments in sustainable innovation include its acquisition of Solus BioTech, a specialist in high-performance, biotechnology-derived ceramides and phospholipids. The acquisition provides a broadened range of ingredients for luxury beauty customers in Asia and around the world while also catering to increasingly popular fermented ingredient and holistic wellness claims.

Ceramides account for more than 50% of the skin's composition and play a vital role in maintaining a healthy skin barrier. The topical application of ceramides can promote efficient repair of the skin barrier, resulting in moisturized, supple and smooth skin. Phospholipids, on the other hand, possess exceptional moisturization potential and can form liposomes to deliver active ingredients effectively to the skin.

Meanwhile, Croda, via its Iberchem division, has acquired Parfex, a Grasse, France-based fragrance house specializing in regional natural raw materials. The addition of the company's nearly four-decade expertise provides customers with an expanded array of natural scent technologies that consumers prefer.

[a]www.crodapersonalcare.com/en-gb/indie-beauty

[b]*Bio-based content is calculated using USDA BioPreferred method and is validated, or being validated, by carbon 14 testing (ASTM D6886). The ECO Range may be suitable for vegan and/or cruelty-free claims; if you are interested in making a vegan and/or cruelty-free claim, please request Croda's vegan suitability statement and/or animal testing statement for specifics on this product and compare to the certification(s) you are seeking to meet.*

Looking ahead to 2030 goals

Beyond its current market-ready innovations, Croda has set a goal to achieve Climate, Land and People Positivity by 2030[c]. This vision for 2030 combines innovation, social responsibility and environmental stewardship to create a positive impact on the world.

Net Nature Positive means actively contributing to the preservation and enhancement of nature. Croda's efforts to reduce the risk of nature loss therefore render its ingredients the preferred innovations of sustainable brands.

Croda is also focused on making a positive impact to improve the lives of its employees and society worldwide by developing personal care ingredients that enhance health and well-being. For instance, Croda has surpassed its 2030 People Positivity target by protecting approximately 60 million lives from sun-related damage, seven years ahead of schedule. Furthermore, Croda considers all stakeholders in its ecosystem and strives to adopt best practices concerning the environment, labor, human rights, ethics, and sustainable procurement.

[c]www.croda.com/en-gb/sustainability



Croda is meeting the rising brand, consumer and retailer demands for sustainable products by investing in innovation, product design and flexible operations, while also collaborating with its supply chain to develop personal care ingredients that offer greater benefits while minimizing their environmental footprint.

3. Cross-category innovation: hair, skin & sun care

In addition to the capabilities derived from its Solus BioTech and Parfex acquisitions, Croda houses unique, effective cross-category ingredient technologies from actives powerhouse Sederma and botanical extract specialists Crodarom and Alban Muller.



Croda's ongoing investments in sustainable innovation include its acquisition of Solus BioTech, a specialist in high-performance, biotechnology-derived ceramides and phospholipids.

Next-level solar protection

Croda's wide range of sun care solutions enables the development of high-performance sunscreens that offer optimal protection against the sun's harmful rays, promoting healthier and safer skin care practices.

- ***UV filters:*** Croda's UV filters offer effective protection against harmful UVA and UVB rays, playing a crucial role in preventing sunburn and skin damage.
- ***Sunscreen actives:*** The company's innovative active ingredients enhance the performance and efficacy of sunscreens, providing improved coverage and protection against UV radiation.
- ***Sensory enhancers:*** Croda's sensory enhancers are designed to improve the overall feel and texture of sun care products, making them more pleasant to apply and wear.
- ***Photostability enhancers:*** To ensure that sunscreens remain effective over extended periods of sun exposure, Croda offers photostability enhancers that maintain the stability and integrity of the sunscreen formulation under UV light.
- ***Sun care formulation expertise:*** In addition to individual ingredient technologies, Croda's team of sun

care experts can provide brands with valuable assistance and support in formulating effective and cosmetically elegant sunscreen products.

On-trend hair care

Croda's wide range of hair care ingredients delivers exceptional performance and multifunctional benefits that cater to the diverse and intricate requirements of today's consumers.

- ***Conditioning agents:*** Croda offers a wide range of conditioning agents that nourish and protect the hair, leaving it soft, smooth and manageable.
- ***Styling polymers:*** The company's styling polymers help to create various hairstyles while providing long-lasting hold and control.
- ***Hair repair solutions:*** Croda's hair repair solutions target damaged hair, restoring its health and vitality.

In addition to a vast ingredient portfolio, Croda offers on-trend guide formulations for various hair care products, including shampoos, conditioners, scalp products, pomades, treatments, colorants, relaxers and styling products.

Furthermore, Croda's global network of hair care experts is specialized in in vitro claims substantiation to validate a variety of appealing claims made to consumers across a range of hair types. This expertise is supported by the company's Product Evaluation Center where a licensed cosmetologist can evaluate product characteristics on hair.

Empowering facial and body skin care innovation

Croda's range of skin care solutions spans active, emotive, effect and chassis ingredients that empower brands to create innovative and effective facial and body care products with unique textures and trendy concepts, meeting the diverse needs of consumers worldwide, regardless of their region or beauty routine. These technologies address the latest skin care trends and can be used to develop new products or to breathe new life into existing SKUs.



Croda's wide range of sun care solutions enables the development of high-performance sunscreens that offer optimal protection against the sun's harmful rays, promoting healthier and safer skin care practices.

Croda has categorized its skin care technologies into the following categories: aging beautifully, body care, effortless cleansing, complexion-enhancing, moisturizing, pollution defense, and shaving and antiperspirants. Key technologies include the following.

- ***Emollients:*** Croda provides emollients that moisturize and soften the skin, maintaining its smoothness and suppleness.
- ***Anti-aging actives:*** The company offers innovative anti-aging actives that target wrinkles, fine lines and other signs of aging, promoting youthful-looking skin.
- ***Skin protection agents:*** Croda's skin protection agents shield the skin from environmental pollutants and other harmful factors.

Using the product finder on Croda's website, brands can easily discover the perfect ingredient that aligns with their specific requirements.

4. Inspiring & winning formulation expertise

In a rapidly changing world with constantly evolving trends and consumer needs, Croda offers both formulation inspiration and ingredient solutions for brands' next personal care formulations. Croda's team of formulation scientists and marketing experts is located around the world, allowing it to tap into a diverse range of expertise and local insights. Combined, these capabilities help brands stay ahead in identifying the latest trends and meeting the ever-changing demands of the beauty and personal care market.

Get started today

Croda's extensive ingredient knowledge, formulation expertise and ability to stay at the forefront of market trends empowers brands to create cutting-edge and effective personal care products that resonate with consumers and drive innovation within the industry. Want to get started? Begin your journey at *www.crodapersonalcare.com*.

WANT TO GET STARTED?

Visit **www.crodapersonalcare.com**.



Roelmi HPC's SelectSIEVE Zen (INCI: Ocimum tenuiflorum (holy basil) (and) Melissa officinalis (lemon balm) (and) Sambucus nigra (elderberry extracts) is an eco-sustainable phytochemical complex designed to promote mental relaxation and mood improvement. The technology is thereby ideal for beauty supplements that offer additional wellness benefits.

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THE BEAUTY INGREDIENT AGENDA: SEPT. 2023

From mood-enhancing ingredients to collagen-boosting technologies to new encapsulation techniques, beauty innovation is set for continuous innovation.

BY JEB GLEASON-ALLURED, content director, *Global Cosmetic Industry* & PETER SMEDLEY, assistant editor, *Cosmetics & Toiletries*

To better help R&D and marketing teams in their product innovation journeys, *Global Cosmetic Industry* publishes monthly reports 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.

Next-level Ingestible Beauty

Beauty x Sleep

Roelmi HPC's SelectSieve Zen (INCI: *Ocimum tenuiflorum* (holy basil) (and) *Melissa officinalis* (lemon balm) (and) *Sambucus nigra* (elderberry extracts) is an eco-sustainable phytochemical complex designed to promote mental relaxation and mood improvement.

SelectSieve Zen increases circulation of the neurotransmitter gamma-aminobutyric acid (GABA), which induces relaxation and reduces anxiety. It also stimulates the hypothalamic-pituitary-adrenal axis to reduce the release of cortisol, the overproduction of which can induce negative health effects.

Per the supplier, the technology improves memory and neuroplasticity via the inhibition of Ach-T and promotes a positive mood by reducing MAO (monoamine oxidase) activity. (MO is an enzyme that eliminates neurotransmitters such as norepinephrine, serotonin and dopamine from the brain.)

The result is improved cognitive function and sleep quality, as well as a general sensation of relaxation and serenity, according to Roelmi HPC. The technology is thereby ideal for beauty supplements that offer additional wellness benefits.

Improving Delivery of Oil-based Ingredients

LandRace Bioscience's water-soluble Self-Emulsifying Nano-Delivery System (SENDS) blends oils, cannabinoids or other poorly soluble ingredients into beverage, food, pharmaceutical, nutraceutical and topical formulations. The result is better and faster absorption of oil-based ingredients while maintaining taste, color, clarity, and quality.

SENDS does not require shearing or sonication equipment, helping to streamline the manufacturing process and decrease the costs of up-front capital expenditures, human capital, maintenance and yield product loss, per the company.



From dysbiosis to cellular senescence and disabled macroautophagy, ingredient firms are helping brands address the 12 hallmarks of aging.

Reinventing Encapsulation

Researchers from the University of Waterloo may have just rewritten the rules for encapsulation. The experts reportedly invented a simple and low-cost method for accurately encapsulating a liquid core material with a thin liquid film (or films) with controllable thickness by exploiting liquid-liquid interfacial energy differences.

Encapsulation protects core materials against environmental insults and/or enables their timely release to a targeted area. Conventionally, encapsulation has been achieved using a thin coating of polymers, nanoparticles, surfactants and/or powders around a core material, or by wrapping the core material in a thin, flexible solid polymer sheet. Per the Waterloo researchers, however, these methods have limitations such as reduced cargo volume, as well as challenges in controlling the thickness and/or functional properties of the encapsulating layer(s).

The new process, known as a liquid-liquid encapsulation system, introduces a drop of core material through a nozzle, which impacts on a host bath containing a floating shell layer on the surface. When the core material interacts with the shell layer, the shell encapsulates and stably safeguards it.

The method reportedly enables a wide range of core-shell combinations and allows for the design of surface-active, multi-layered (liquid/solid/colloid) capsules, supporting maximum flexibility in designing unique capsules.

"The key to this technology is that everything is in liquid state—the core, the shell and finally submerged inside a liquid bath," said Sushanta Mitra, Ph.D., executive director, Waterloo Institute for Nanotechnology and professor of mechanical and mechatronics engineering at the university. "This provides extraordinary flexibility in terms of

core shell combinations. At least 15 of these types of combinations have already been demonstrated."

Mitra added that the process is ultra-fast: "[E]ach encapsulation tak[es] only 50 milliseconds. This technology is at least 5,000 times less energy intensive [than conventional encapsulation] and it avoids the introduction of any microplastics in the encapsulation process."

This technology could be useful in the nutraceutical, pharmaceutical, food and beverage, cosmetic and personal care industries. For example, per the university, the use of soft gel filling encapsulation machines in the nutraceutical industry could reduce operating costs and expand the development and production of new products because multiple core materials can be encapsulated and delivered in the same parcel.

Mitra and his team have reportedly developed a robust prototype system with four injection nozzles that can deliver up to 200,000 cargo-containing encapsulates in one hour. In addition, they are working with partners and product manufacturers in the Netherlands to integrate the curing stage so the encapsulated cargo can be extracted as individual capsules on demand if needed.

"In the end we strive toward being a sustainable and innovative encapsulation entity that meets the UN sustainable development goals," Mitra said.

12 Top Targets of Aging

A 2023 paper published in the journal *Cell* and authored by C. López-Otín, et al., has identified 12 key contributors to aging (the first nine were identified in a 2013 paper and updated this year; *www.cell.com/fulltext/S0092-8674(13)00645-4*), providing a roadmap for beauty brands seeking to hack the aging process. One such company, Dior, has "defined a vision to act not only on the visible consequences of skin aging, but also on its underlying causes, by targeting one or more of these aging hallmarks."

The 12 hallmarks of aging, as outlined by the paper's authors, are: genomic instability, telomere attrition, epigenetic alterations, loss of proteostasis, disabled macroautophagy, deregulated nutrient-sensing, mitochondrial dysfunction, cellular senescence, stem cell exhaustion, altered intercellular communication, chronic inflammation and dysbiosis. These factors are often interrelated, the authors note, pointing to the need for holistic treatments.

Some of these targets have already been the focus of ingredient innovation. Below are several recent examples.

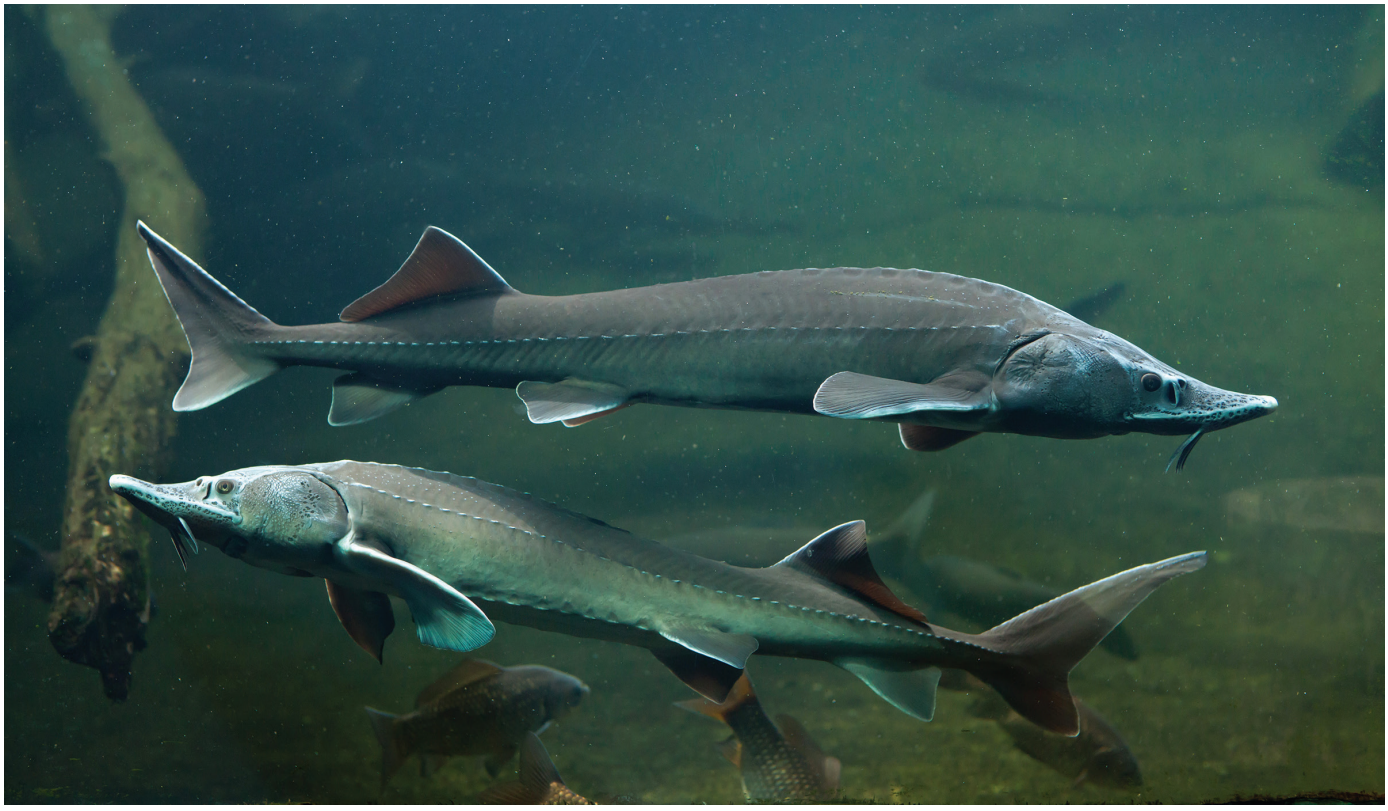
Telomere attrition: IFF/Lucas Meyer's IBR-Dormin is made from the *Narcissus tazetta* (Galilee) bulb and designed to capture and transfer the plant dormancy concept to skin cells, in turn preserving youthful, healthy skin function. When dormant, the bulb produces dormins, i.e., growth inhibitors, that reversibly slow down cell proliferation. According to the company, the ingredient slows skin fibroblast proliferation, preserves telomeres and delays entry into cellular senescence, preserving the capital of the skin and reducing the appearance of wrinkles by improving elasticity.

Epigenetic alterations: Givaudan Active Beauty's Chronoglow is an active ingredient made by green fractionation and intended to mimic botanical epigenetic mechanisms for skin care benefits. Created from *Haberlea rhodopensis*, also known as the resurrection plant, Chronoglow is a natural active for the skin designed to reverse the effects of aging and improve its radiance. According to Givaudan, the ingredient rejuvenates the skin at different cellular levels, from epigenetics to protein expression, and protects cells against senescence and oxidation.

Cellular senescence: Roelmi HPC's Ener-GY Plus reportedly prevents signs of skin fatigue by improving skin elasticity, firmness and radiance. Ener-GY Plus is a cell energizer active ingredient comprising upcycled biologically active solvents rich in fruit oligo-elements. The technology is designed to optimize mitochondrial activation. Due to the Ener-GY Plus' specific efficacy in supporting mitochondrial biochemical pathways, the active provides positive conditions for metabolism and trophic cell processes. The active promotes ATP production in mitochondria by



Clariant's recent Joyologist skin care concept formulations were designed to soothe the skin and the mind.



Geltor's Caviance is a novel vegan polypeptide produced via fermentation that mimics the amino acid sequence of type II sturgeon collagen for skin rejuvenation and soothing.

positively modulating the cell-energizing activity. As a result, it decreases cellular senescence by promoting a high cellular vitality and responsiveness.

Dysbiosis: Novachem's Oleobiota botanical active, derived from tannin-rich nangapiri from the Argentine Misiones rainforest, is reportedly ideal for oily to combination skin. It is said to modulate the oily microenvironments of the skin and scalp. The ingredient is designed to interact in a "gentle, intelligent and friendly" manner. Per Novachem, Oleobiota prevents dysbiosis, reduces redness, balances microbiota and has a mattifying action. In addition, it reduces and minimizes the appearance of pores, thanks in part to its natural astringency, giving skin a clean and clear sensation.

Mood x Beauty

Clariant's recent Joyologist skin care concept formulations were designed to soothe the skin and the mind. The formulations highlighted the benefits of Rootness Mood+, which is obtained from the roots of *Sanguisorba officinalis* using the supplier's plant milking technology. The root extracts purportedly help trigger the skin's photoreceptors and promote the uptake of vitamin D, thereby enhancing the beneficial effects of sunlight on human skin, and increase serotonin and melatonin levels by 55% and 120%, respectively.

The Joyologist range included the Feel-Good Magic Stick, an aqueous gel stick that can be applied whenever the user feels the need for a boost in well-being. The stick also contains B-Circadin, which helps re-synchronize the skin cell's biological clock, and HerbEx Curcuma Extract, which reportedly increases the skin's stress resilience.

The collection also includes the Forget-It-All Relaxing Mask, featuring Clariant's Beracare CBA, a blend of copaiba oil and passion fruit seed oil. Copaiba oil is rich in β-caryophyllene, a phytocannabinoid known to interact with the skin's endocannabinoid system, allowing it to modulate cellular signals to reduce irritation and calm the skin. The actives found in Beraca CBA also reportedly help to rebalance the sensitive skin microbiome by down-regulating certain bacteria linked to inflammation.

The efficacy of Rootness Mood+ has been studied by the supplier. According to Clariant, a clinical study of 36 female participants between ages 30 and 50, all reporting low mood and presenting a dull facial complexion, applied twice daily a product containing 1% Rootness Mood+ to their entire face. Another group used a placebo. Over the course of about a month, the researchers documented skin and mood effects using questionnaires, visual

assessments, lab tests, and even an electroencephalography (EEG) device that measures certain brainwaves related to relaxation. Per Clariant, relaxation levels, as recorded by the EEG device, increased by 279% for the study group, while there was no change observed among the control group. This mood-boosting effect is equal to that of a yoga session, according to the company. Furthermore, there were visible improvements to the skin complexion and a significant decrease in carbonylated proteins, a group of stress-related compounds found in the outermost layer of the skin that are known to cause a dull complexion.

Vegan Collagen Boosters

Geltor's Caviance is a novel vegan polypeptide produced via fermentation that mimics the amino acid sequence of type II sturgeon collagen for skin rejuvenation and soothing. Sturgeons' skeletons comprise nearly 100% cartilage, featuring high levels of type II collagen, the amino acid sequence of which is rich in cell signaling domains, per the company. This property has benefits for skin rejuvenation, soothing and antioxidant benefits, as well as wound healing in skin care, body care and even color cosmetics.

Elsewhere, Ichimaru Pharcos' Vegan Proteoglycan is manufactured using sugarcane-derived 1,3-butylene glycol. The ingredient reportedly increases both fibroblast proliferation and collagen production, both of which decline with age. By increasing collagen density, the technology diminishes the appearance of wrinkles, improves skin texture and reduces the appearance of age spots. The technology leverages proteoglycan derived from the ghatti tree, or *Anogeissus latifolia*.

Hyaluronic Acid Defender

Ichimaru Pharcos' HyaluGuard (INCI: water, butylene glycol, *Artemisia capillaris* flower) is an anti-aging skin care active ingredient designed for facial care, body care, lip care and makeup applications. The technology reportedly defends hyaluronic acid (HA) from breakdown by inhibiting HYBID, an HA degradation enzyme, thereby increasing the moisture content of the skin and reducing the appearance of wrinkles and skin sagging. HyaluGuard leverages *Artemisia capillaris* from Japan.



Biocogent's DermaPhage CA is a bio-active designed to target acne-causing microbes.

Anti-glycation Blend

MMP's Flav'ential AGE is a blend of *Pueraria lobata* root extract (puerarin) and chlorogenic acids (*Eucommia ulmoides*) with anti-glycation activity. Combined, the components protect fibrillin and the elastic network from degradation and inhibit the formation of inflammatory advanced glycation end products (AGEs). Elevated levels of AGEs are responsible for skin discoloration, lack of elasticity and deepened wrinkles.

New Anti-acne Tools

Precision Microbiome Balancing

Biocogent's DermaPhage CA is a bio-active designed to target acne-causing microbes. The ingredient comprises three lytic bacteriophages, which attack *C. acnes* bacteria to selectively diminish the overpopulation of "problematic" microbiome residents to restore the natural balance on the skin. Skin's quality is therefore improved by eliminating *C. acnes* strains that can stimulate sebum production and inflammation in the skin. DermaPhage CA also reduces the formation of harmful biofilms. In clinical trials, the ingredient reportedly visibly reduced the amounts of coproporphyrin III on the face. The technology is therefore applicable in face and body products.

Antioxidant Powerhouse for Acne

Cobiosa's C99+ Hydroxysol combines 99% pure hydroxytyrosol produced via biotechnology and the chicory-derived polysaccharide, inulin. The combined high polyphenol content delivers high antioxidant capacity (reportedly 13x vitamin C and 3x coenzyme Q10) and boosts collagen and elastin fibers to help rebuild the skin. In formulations, the technology can treat acne and promote skin evenness. Per the manufacturer, the ingredient reduces wrinkles by 6% in 28 days and 14% after 56 days. C99+ Hydroxysol is distributed in the United States and Canada by MMP Inc.

Mushroom-derived Hydration & Anti-aging

Integrity Ingredients' IntegriMoist Silver Ear Mushroom Powder Extract for skin care is derived from *Tremella fuciformis* sporocarp. The silver ear mushroom has been cherished in Asian cultures for centuries due to its hydrating and rejuvenating properties.

The ingredient offers nutrients, including amino acids, vitamins, minerals and polysaccharides. Its main ingredient, glucuronic acid, is known for its ability to bind moisture to the skin for hydration. This extract plumps fine lines and wrinkles and enhances skin elasticity, leaving the skin smooth and supple with a nice texture.

The ingredient also offers strong antioxidant properties, protecting the skin from free radical damage and premature aging. Its natural anti-inflammatory effects soothe and calm the skin, allowing it to be formulated for acne-prone and sensitive skin types.

Vacuum Distillation-centric Brand

Facewater, a new brand from Plant Beauty Distillery, features plant-based cleansers, toners, moisturizers and other skin care SKUs. The brand leverages pre-press and low-heat vacuum distillation to derive phytonutrients from botanicals for application in its water-based products, which are highly absorbent and skin-compatible. The Plant Venom Alt Retinol, for instance, is a gentle formulation that features bakuchiol and distilled bakuchi seeds to improve skin elasticity and the appearance of fine lines and wrinkles. The 'Shroom Moisture Boom, meanwhile, highlights distilled snow mushroom (rich in kojic acid) and low-molecular-weight hyaluronate. The formulation addresses dark spots and under-eye circles while enhancing the firmness and elasticity of the skin. Finally, the antioxidant Serumato targets dark spots caused by the sun, pollution and other environmental aggressors with stabilized vitamin C and tomato-derived lycopene.

Antimicrobial Tech for Sensitive Skin

Jover Scientech's Vercatech Pentyforce G (INCI: pentylene glycol (and) glyceryl caprylate) is a natural, multifunctional ingredient with broad-spectrum antimicrobial properties optimized for atopic skins. The ingredient reportedly reduces TEWL and is gentle on the skin's microbiota. Vercatech Pentyforce G is distributed in the United States and Canada by MMP Inc.



Integrity Ingredients' IntegriMoist Silver Ear Mushroom Powder Extract for skin care is derived from Tremella fuciformis sporocarp.



Jover Scientech's Vercatech Pentyforce G (INCI: pentylene glycol (and) glyceryl caprylate) is a natural, multifunctional ingredient with broad-spectrum antimicrobial properties optimized for atopic skins.

Synthetic Quat Alternative

Croda's Incromine BD (INCI: behenamidopropyl dimethylamine) comprises 73% naturally derived content according to ISO 16128, is readily biodegradable, halal and is vegan-suitable. The technology offers anti-frizz benefits and therefore serves as an alternative to synthetic quats.

New Approaches to Silicones

Wacker recently launched several silicone elastomer gels for cosmetics and hair care, showcasing a more sustainable approach to silicones. Previously, conventional silicone

elastomer gels were often formulated with volatile siloxanes. Instead of a siloxane-based solvent, these latest Wacker products contain organic substances and stabilize the gel's crosspolymer network to enhance spreadability. The range includes:

- Belsil EG 3000 (INCI: isohexadecane, dimethicone/vinyl dimethicone crosspolymer), a transparent silicone elastomer gel that offers a pleasant skin feel for use as an additive in products such as moisturizing creams, foundations and deodorants.
- Belsil eco EG 3001 (INCI: undecane, tridecane, divinyldimethicone/dimethicone crosspolymer), a colorless, translucent elastomer gel that is light and powdery.

Elsewhere, Sensient's Natpure Feel-M Eco (INCI: isopropyl palmitate, octyldodecanol, octyldodecyl myristate, isostearyl isostearate) is a multifunctional material that behaves as an alternative to silicone. In formulations, the technology offers a conditioning effect and can be applied in skin care, bath and shower products, hair care, sun care, makeup (lip, face, nail, etc.), and more.

Controlling Melanin Production

MMP's Flav'ential BLM comprises a blend of flavonoids—baicalin, luteolin and myricetin—with strong anti-tyrosinase activity. Combined, the components work to limit melanin formation, which in turn can prevent unwanted dark spots. The technology reportedly is well tolerated on skin.

Multifunctional Hair Technology

Sensient's Sensibiopro P (INCI: hydrolyzed pea protein) hydrolyzed pea protein imparts shine, frizz control and hair strengthening in hair care formulations. Ideal for all hair types, including processed hair, the ingredient offers skin care benefits as well, moisturizing the skin and scalp.



Sharon Personal Care's SharoWipes clean label, eco-friendly preservative system is free from phenoxyethanol, parabens, CIT/MIT and formaldehyde donors.

Low-carbon Formulation Tools

Decarbonization of the beauty supply chain is a movement that's just begun to pick up steam. Suppliers play a central role in helping brands and their innovation partners meet decarbonization goals. For instance, Clariant's Vita line of biobased surfactants and PEG products were conceived with a high renewable carbon index (RCI), allowing products to maximize their green carbon content while removing fossil carbon from the value chain—without a decline in performance.

These ingredients are based on green carbon made from plants via bioethanol and other oleochemical sources, per Clariant, with fully segregated material flows of sugarcane or corn to the final ingredient. Adoption of these materials can reportedly help make significant CO_2 emission cuts from the value chain.

Clariant has also developed multifunctional, fully renewable-based preservative boosters to reduce the reliance on traditional preservatives. Its Velsan line cuts the amount of conventional preservatives required in a formulation while simultaneously acting as an emollient and/or emulsifier, depending on the formulation.

Next-level Surfactants

Sisterna's SP70-C is a non-ionic surfactant sucrose stearate based on sucrose and vegetable fatty acids. The technology is part of a wider range that imparts preferred skin feel and improved smoothness, emolliency and moisture levels to the skin. The technology is distributed in the United States and Canada by MMP Inc.

Meanwhile, Indorama Ventures' Surfonic Bio is a line of biosurfactants that offers low toxicity, mildness and biodegradability benefits—all derived from renewable sources. According to the company, the line works well with other classes of surfactants and can be used as

a primary or secondary surfactant in formulations. The Surfonic line contains specialty wetting agents, emulsifiers and dispersants.

Applications of products in the line, including Surfonic Bio 5000, include:

- Facial cleansers, makeup removal, anti-acne products
- Shower gel, liquid soaps and intimate hygiene soaps
- Moisturizing skin care products
- Shampoos, conditioners, scalp care and deodorant products

Biodegradable Anti-bacterial System for Wipes

Sharon Personal Care's SharoWipes clean label, eco-friendly preservative system is free from phenoxyethanol, parabens, CIT/MIT and formaldehyde donors. In products, the technology reportedly protects both the formula and the nonwoven material. SharoWIPES leverages broad-spectrum bacteria defense and an anti-biofilm mechanism to prevent bacterial adherence. The water-soluble, vegan and readily biodegradable solution is reportedly effective at usage levels of less than 1%.

"Preservation of wet wipes is known to be a very challenging issue," said Paul Salama, Ph.D., chief technical officer and head of innovation at Sharon Personal Care. "The unique product characteristics of wipes introduce microbiological risks for both the formula and the fabric, and ingredient safety concerns are especially high with wet wipes, since they are used for baby care and on sensitive areas. Our SharoWipes line was created following in-depth research to address these challenges. The solutions in this line are optimized with carefully selected hydrophilic components that are combined with a unique anti-biofilm mechanism to deliver an ultimate level of protection for the wipe and formula."

Fruit-derived Beauty

Multifunctional Kalahari Melon Seed Oil

Kupanda's Elula Kalahari Melon Seed Oil (INCI: *Citrullus lanatus* seed oil), derived from the Kalahari Desert, is a smaller and rounder cousin of the watermelon. Its bitter pulp is yellow-green and features oil-rich brown seeds. In formulations, the seed oil provides skin barrier protection, defends against environmental stressors such as pollution, balances the microbiome to cleanse and eliminate blemishes, and serves as an antioxidant. The oil is rich in vitamin E; linoleic, oleic, palmitic and stearic fatty acids; and γ-tocopherol, β-sitosterol, campesterol and squalene. The ingredient is appropriate for facial cleansing gels and scrubs, hand and body creams and lotions, body massage oils, aromatherapy oils, hand soap bars and liquid soap, and lip balm and repair creams, as well as lipstick.



Ecoflora, based in Colombia, is tapping jagua (Genipa americana) fruit to source a natural blue color that can be applied in beauty products, among other applications.

Wild Plum Rejuvenator for Skin & Hair

Kupanda's Mideka Ximenia Oil (INCI: *Ximenia americana* (ximenia) seed oil), sourced from Zimbabwe and known as "wild plum" oil, can be applied as an emollient, conditioner, skin softener, and in other hair and body applications, per the company. Mideka Ximenia Oil counteracts the impacts of environmental pollution stressors due to its antioxidant properties, which derive from high levels of phytosterols such as lupeol, β-amyrin and β-sitosterol. It also features monoenoic acids, including ximenynic acid, a microcirculatory stimulator, making it ideal for skin and hair follicle rejuvenation. Finally, the oil's tocotrienol content delivers antioxidant, anti-inflammatory and antimicrobial activity. The oil is applicable in anti-aging creams and nano-emulsions; shampoos, conditioners, scalp masks and leave-in lotions for hair growth; facial gels, serums and cleansers; lip care; and moisturizing/hydtrationg creams and lotions, as well as body massage products.

A Natural Blue from Fruit

Ecoflora, based in Colombia, is tapping jagua (*Genipa americana*) fruit



Kupanda's Mideka Ximenia Oil (INCI: Ximenia americana (ximenia) seed oil), sourced from Zimbabwe and known as "wild plum" oil, can be applied as an emollient, conditioner, skin softener, and in other hair and body applications, per the company.

to source a natural blue color that can be applied in beauty products, among other applications. The natural colorant is derived from the juice of the fruit, which contains the compound genipin. When glycine is mixed with the juice and heated, the genipin reacts with the amino acid to produce the blue color[a]. Ecoflora's blue pigment is soluble in water and temperature- and pH-stable.

Reinventing Ingredient Delivery

Beverly Glen Laboratories, Inc. has launched NuvoSome, a drug delivery system for cosmetics. Per the company, NuvoSomes are nanocapsules capable of encapsulating a variety of cosmetic ingredients to enhance ingredient stability and ingredient performance and feature a lipophilic group and a hydrophilic group, making these vesicles both lipid- and water-compatible.

NuvoSome was designed and developed in Japan and has undergone pharmaceutical and clinical testing. According to the company, Nuvosome has been proven to penetrate the skin barrier effectively and has shown to be safe for cosmetics, allowing companies to create products that deliver active ingredients.

α-Bisabolol Gets a Sustainable Upgrade

Aneco's BioSyn-Bisabolol (INCI: α-bisabolol) is a sustainable ingredient produced through large-scale fermentation. According to Aneco, the green production method used to generate the ingredient protects biodiversity and plays a positive role in the overall ecological environment by relying on 100% biobased carbon. The process used by the company is said to offer greater physiological activity compared to the synthetic source of α-bisabolol.

α-Bisabolol has been used in traditional medicine for hundreds of years. With a wide range of uses, the ingredient offers anti-inflammatory and skin soothing benefits, supports barrier repair, and can protect the skin from daily stress, per Aneco. It is particularly suitable for products for sensitive skin care, baby care and after-sun applications. ■

[a]www.science.org/content/article/rare-blue-dye-faces-risky-path-from-rainforest-to-product

Want more Ingredient Aganda?

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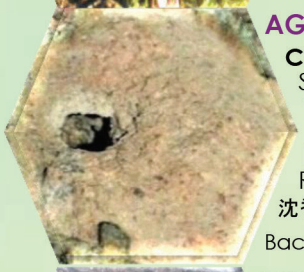
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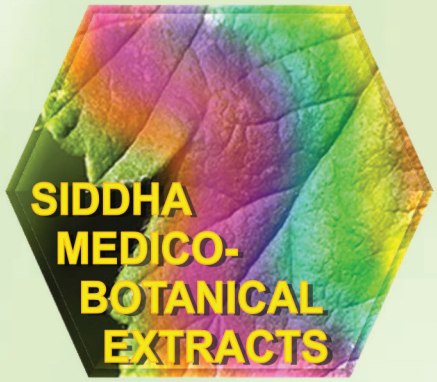
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Spate recently noted that terms such as "revitalizing" and "ageless" are the fastest-growing keywords accompanying consumer hair care searches.



5 TOP HAIR HEALTH INNOVATION OPPORTUNITIES

Increasingly complex solutions for the hair are driving category premiumization and opening new brand possibilities.

In 2023, hair care is self-care, an extension of overall health. Increasingly, ingredients and brands reflect this evolution.

Simply look at the hair care ingredients experiencing the highest month-over-month search growth as of July 2023, per Spate: scalp-soothing rosemary and jojoba oils (increasing by 33.7K and 4.0K searches per month, respectively) and hair growth stalwarts minoxidil and ketoconazole (increasing by 11.4K and 8.3K searches per month, respectively).

"Hair care is not just about the appearance of the hair, but also maintaining a healthy scalp and hair follicles," says Alex Walther, manager, technical services–beauty and personal care, Univar Solutions. "A healthy scalp can prevent issues like dandruff, itchiness, inflammation and hair loss. A healthy hair follicle promotes hair growth, strength and shine. More products launching now are currently focusing on the microbiome of the scalp and how it can impact scalp and hair health."

A perfect example of the growing scalp wellness trend is new brand Tecuane's Esperanza Scalp Tonic ($66), a daily leave-in product for a wide range of hair textures, designed to address irritated scalps. The vegan formulation reportedly draws moisture to the scalp with ingredients such as prickly pear cactus, sage oil, chamomile, plant-based collagen, and castor, jojoba and almond oils.

Walther notes that there are other targets in the hair wellness space: "[T]he health of your hair and follicles is impacted by what you eat, what you put on your hair and the environment to which it is exposed. Therefore, hair care is connected to the overall well-being of the body and many of your daily choices."

She adds, "On top of that, hair care can also be a form of self-care and self-expression. Choosing natural and organic products that nourish and protect the hair can show respect and love for oneself and the environment. Styling and coloring hair can reflect one's personality, mood and creativity, connecting hair care to the overall well-being of the mind and soul. Ultimately, hair care is a personal choice that depends on what makes you feel good and confident."

As Circana noted earlier this year[a], hair health was a major growth driver in Q1 2023 U.S. sales, particularly targeted treatments, heat protectants, leave-in treatments, scalp care and hair thinning solutions.

Walther has noticed the shift in product formats. She explains, "There are so many great new formats targeting scalp care that aim to cleanse, exfoliate, nourish, and balance the scalp, which is the foundation of healthy hair. They can include shampoos, scrubs, toners, serums, masks and treatments. Currently, exfoliating shampoos are a big ask along with nourishing scalp serums. With both, the key formulating challenge is making a product that will be easy to deliver to the

[a]www.npd.com/news/category/blog/

scalp either through low viscosity or innovative packaging."

She continues, "Hair repair products come in many forms and include shampoos, conditioners, masks, oils, serums and leave-in products that contain ingredients that can replenish moisture, protein and lipids in the hair. Consumers want convenient and easy-to-use products like a no-rinse formula or sprays. With each format, the product must be easy to distribute evenly through the hair."

Circana notes that hair health product types outgrew the general hair category in Q1. Hair care results also benefited from the highest year-over-year average price increase across all beauty categories. In particular, this growth was driven by an increase in sales of products priced above $30. The key takeaway: hair health is driving premiumization.

Here, we break down several top opportunities for brands to deliver on consumer-preferred claims.



Hims & Hers Health, Inc. recently launched its prescription Hair Blends line, which offers personalized options to treat hair loss under the Hers brand.

1. Revitalized & Ageless Hair

Spate recently noted[b] that terms such as "revitalizing" and "ageless" are the fastest-growing keywords accompanying consumer hair care searches. Revitalizing searches have grown 38% year-over-year, with popular examples including "thicker fuller hair revitalizing shampoo," "revitalizing hair blend by Hair La Vie" and "Juvetress revitalizing hair therapy reviews." Spate notes that the use of the keyword "reviews" points to shopper demands for proof of efficacy.

To test the prevalence of the concept, *Global Cosmetic Industry*'s editors conducted a "revitalizing" hair search of Sephora, which yielded 29 results, including Vegamour products for thinning hair, Augustinus Bader's Revitalizing Haircare System, Reverie's Ever Recovery Hair Oil and Alterna's anti-aging hair care solutions.

"Ageless" searches, on the other hand, evoke a popular concept in skin care and have grown nearly 34% year-over-year, led by searches such as "Jhirmack Silver Brightening Ageless Shampoo," which offers moisturization for gray, blond and white hair. A Sephora product search for ageless hair offerings yielded 20 results, including Vegamour's anti-gray hair products and Shu Uemura's anti-brass products for blond hair. The former makes sense given that Spate found "consumers are also searching for 'gray blending'" products.

Univar Solutions' Walther notes that this focus on revitalization is in line with wider concerns: "Repairing hair damage remains a key concern since we damage our hair every day just by brushing and styling it. Even consumers that do not heat, style or use chemical treatments still have damage from the sun exposure and pollution. This damage leads to the hair's loss of shine, strength and elasticity. Conditioning agents can temporarily repair weak areas in the hair shaft while helping prevent further damage by increasing the hydrophobicity of the hair and reducing comb force. Some conditioning agents also provide protection from UV, heat and pollution."

Damage defense ingredients include the HydroxyShield Polymer, from Dow, a hydroxyamino functionalized silicone that conditions the surface of damaged hair, reportedly restoring the hair's hydrophobic state. At the same time, the technology provides reduced breakage and ease of styling.



Thix Hair is a new brand focused on supporting hair growth via the use of caffeine, a perennial favorite in consumer searches online.

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

2. Hair Loss & Regrowth

Google searches for hair loss among women peaked between the springs of 2020 and 2022, per Google Trends data. Unsurprisingly, the top related queries focused on the impact of COVID-19 on hair health. That volume has declined somewhat since then but remains elevated. And, interestingly, ingestible brand Nutrafol is by far the leading brand associated with women's hair loss, per Google.

Seeking to break into the space, Hims & Hers Health, Inc. recently launched its prescription Hair Blends line, which offers personalized options to treat hair loss under the Hers brand. The blends comprise materials that support healthy hair such as biotin, vitamin C, vitamin B5 and B6, zinc, and selenium. The formulations can be provided in oral/pill and topical formats.

Hers also offers more traditional treatments such as topical minoxidil and ingestible solutions including spironolactone or minoxidil. For post-menopausal women, Hers features topical finasteride.

"This is really about bridging the gap between beauty and the pharmacy," said Hilary Coles, co-founder of Hims & Hers and senior vice president of brand and innovation. "We found that only one in four women experiencing hair loss talk to a doctor and so might not be aware of the doctor-trusted ingredients available to treat hair loss. Women are also faced with the stigma surrounding women's hair loss and the reality that there isn't enough support in the market today. Customers have shared with us that they feel as if they are left to research solutions on their own—and what they are often finding is not meeting their goals. In fact, our research shows 90% of women are looking for new solutions. We're stepping in to fill that gap with Hers, by providing women with access to tailored treatments that can be prescribed to address each individual's unique needs, hair type, lifestyle and goals."

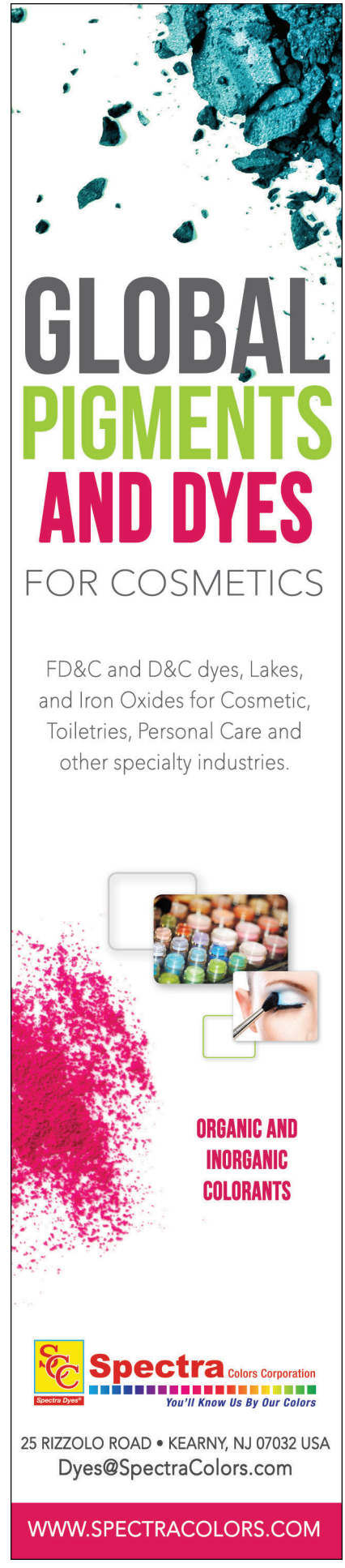
Also on the ingestible front, Vitamins Revive has launched the Hair Growth Vitamins Kit for Women, which features two bottles of Hair Nutra Growth and one bottle of Hair Nutra Boost. The vegan formulations, inspired by traditional Chinese medicine and designed to be efficiently absorbed, comprise ingredients such as vitamin A (acetate); liposomal vitamin C (ascorbic acid; active particle is nano micron size, coated with a phospolipid layer for increased absorption, per the supplier); biotin, folic acid, vitamins B1, B2, B3, B5, B6 and B12; zinc; selenium; liposomal magnesium citrate; magnesium sulfate; methylsulfonylmethane; nano curcumin extract; *Cuscutae chinensis* extract; *Fallopia multiflora* extract; saw palmetto extract; pine bark extract; and *Spirulina platensis*.

On the topical front, new U.K. brand Thix Hair is focused on supporting hair growth via caffeine. As reported in the June 2023 *Global Cosmetic Industry* issue[c], online hair care searches featuring caffeine have been on the rise, per Spate. In March 2023, Spate noted that caffeine is one of the fastest-growing keywords searched alongside



Vitamins Revive has launched the Hair Growth Vitamins Kit for Women, which provides two bottles of Hair Nutra Growth and one bottle of Hair Nutra Boost.

[c] *"The Ingredients Driving The Hair Health Revolution," page 58, June 2023;* www.gcimagazine.com/magazine





A recent white paper from Carra Labs points to Mintel data showing that a whopping 95% of Black women would consider switching from their current hair care brand, pointing to significant and ongoing dissatisfaction.

the term "shampoo" in the United States. Though evidence is limited, consumers appear to be responding to the notion that caffeine can have a positive effect on hair growth. In fact, a common search pattern is "caffeine shampoo for hair loss," per Spate. Late last year, Briogeo entered the caffeine chat with its Destined for Density serum, featuring caffeine, biotin and peptides that are clinically shown to increase hair density by up to three times, according to the brand. Destined for Density features a non-greasy, lightweight formula that absorbs quickly onto the scalp. It reportedly encourages nutrient-rich microcirculation to the scalp.

Thix's hair care routine features a daily Caffeine Shampoo, Conditioner and Styling Paste; all formulations are vegan. The formulations' caffeine content is intended to stimulate follicle growth by "inducing hair cells to produce adenonsine triphophate (ATP)," per the brand, which delivers energy that stimulates cell growth. The brand also cites the potentiality of caffeine to boost the protein insulin-like growth factor (IGF1), "an important signaling molecule in promoting hair growth," and to possibly "reverse the effects of dihydrotestosterone (DHT)," the key hormone associated with many cases of balding. Finally, the brand includes a signature mint scent that reportedly helps "energize" the scalp and hair strands.

Univar Solutions' Walther concludes, "Consumers and suppliers realize how much scalp health can impact hair health. This is targeted in several ways such as using vitamins to nourish the scalp, which can lead to a healthier and thicker appearance of the hair. We are also seeing interest in exfoliating the scalp to rid it of dead skin and product buildup that could be irritating. Salicylic acid, lactic acid,and even physical exfoliants are being promoted for deep cleaning."

Scalp-friendly ingredient technologies include DSM's BeauPlex VH, a compound comprising Quali vitamins B3, B5, B6, C and E that imparts a protective effect on the skin and the scalp. It also strengthens hair while moisturizing and soothing the scalp. In addition, it reportedly defends the scalp from oxidation, vitalizes scalp cells and improves scalp tone.

3. Addressing the Textured Hair Health & Efficacy Gap

As *Global Cosmetic Industry* has been reporting for years, textured-haired consumers—particularly, though not exclusively, Black shoppers—are seriously under-served. As far back as 2018, this publication

reported that, according to a TextureTrends report, textured-haired shoppers were spending an average of $205 a year on hair products, versus $130 a year for non-textured-haired consumers.

Fast-forward to the present: a white paper from Carra Labs[c] featuring a forward from CEO Winnie Awa points to Mintel data showing that a whopping 95% of Black women would consider switching from their current hair care brand, pointing to significant and ongoing dissatisfaction.

Focusing particularly on Type 4 hair (textures ranging from coily to tight coils to zig-zag patterns, compared to the wavy/loose curls of Type 2 hair and defined curls/spirals of Type 3 hair), the report found that 60% of consumers with this texture have four or more hair concerns, compared to just 35% of those with Type 2 hair.

Furthermore, two out of three Type 4 hair consumers reportedly experience dryness and slow hair growth and are 2.2x more likely to experience breakage than other hair types. Meanwhile, 45% of Type 4c consumers are concerned about hair loss/thinning compared to 29% of Type 2 consumers.

Brands will need to understand the intricacies of consumer needs depending on hair types, the report notes, including providing reliable education and rituals designed to help shoppers meet their goals.

Upstart brands are seeking to address some of these concerns. For example, OurX recently debuted a platform for textured hair, offering individualized systems of personalized regimens, one-on-one hair coaching, education and community support. BIPOC investor, entrepreneur and Revlon board member Ceci Kurzman founded the brand in response to the lack of investment in, innovation for and data about textured hair.

[c]*Carra Labs is an AI-driven hair care personalization platform that provides tailored product recommendations and hair care routines for consumers;* https://carra.co/texturegap.



OurX recently debuted a platform for textured hair, offering individualized systems of personalized regimens, one-on-one hair coaching, education and community support.

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Upon the launch, Kurzman said, "Presently hair care remains segregated in the beauty and personal care industry, with solutions for those with textured hair remaining separate and unequal. While celebrating the many powerful brands already shaping this category, OurX endeavors to change the conversation with proven data that combats an oversimplified, one-size-fits-all view of the textured hair consumer."

Users can access OurX initially through its web-based app on *ourx.co* and go through an in-depth assessment that collects data on everything from the user's hair and scalp attributes to their lifestyle and preferences.

The assessment includes a series of at-home hair health tests and personalized education that is responsive to the user's inputs. The analysis of this data, combined with the input of trained hair experts, provides consumers with a daily regimen and insights on how to achieve their optimal hair health.

The regimens include a curation of treatment-based products developed by OurX, including:

- Pre-Cleanse Micro Oil, an oil-based pre-cleanse that detoxifies and strips buildup and debris from the scalp while nourishing the hair with omega fatty acids and antioxidants.
- Nutrient Cleanse Complex, a high-dose of moisture with cleansing benefits. The complex is formulated to replenish moisture, balance the scalp and prep hair to receive better moisture penetration and longer-lasting styling.
- Detox Cleanse Complex, a gentle exfoliating shampoo that removes buildup from the scalp and hair that can cause congestion. This shampoo is formulated with glycolic acid and salicylic acid to unclog pores in the scalp and features anti-inflammatory polysaccharides to reduce scalp stress for a clear scalp and rebalanced hair.
- Scalp Serum, a soothing scalp balm formulated to penetrate the scalp without leaving behind residue. The serum can be used on wet or dry hair as a scalp reset.
- Scalp Purifying Solution is a gentle exfoliating scalp tonic that removes buildup from the scalp with chemical exfoliants, micellar water and balancing symbiotics to nourish and treat scalp. It can be used as a purifying step with shampoo or between washes as a scalp refresh.
- Intensive Conditioning Compound is a deeply penetrating moisture mask formulated with humectants, occlusives and emollients to absorb and retain long-lasting moisture to the strands while increasing hair flexibility, overall health and longevity.
- Treatment Leave-In, a lightweight cream leave-in conditioner formulated to provide long-lasting moisture retention without residue for effortless styling. The cream is formulated with heat protection to preserve shine and natural color against thermal heat and environmental factors.



P&G's Head & Shoulders brand recently launched BARE, a nine-ingredient anti-dandruff shampoo that is said to "get the job done with no trade-offs."

4. Sustainable Hair Health

Solid/waterless hair care brand Superzero recently restaged itself by tapping the clinical skinification trend alongside sustainable formulations. Debuting at Sephora, Superzero's reformulated solid products retail for $28 and are reportedly equivalent to two 8.4 oz bottles of liquid hair care.

They feature the brand's 360 Triflex Complex, combining bond-building materials with biome-enhancing triolein and biotech botanicals to meet the goals of various hair types. The complex reportedly strengthens

internal hair structure by as much as 3x compared to untreated hair.

The Soothing Scalp Shampoo Bar for Flaky and Itchy Scalps features the bond-building tech; triolein for microbiome support, hair shine and smoothness, and frizz control; *Ziziphus joazeiro* extract for flaking and itch reduction; and tea tree and rosemary oil to sooth the scalp and further control flaking. Meanwhile, the Hydrating Repair Shampoo Bar for Dry, Damaged Hair & Light Frizz includes the bond builder; triolein; hemisqualane for frizz reduction, ease of combing, boosting of color longevity and improved thermal protection; and shea butter for moisture, shine and softening effects.

The solid, concentrated products are certified carbon neutral across scope 1, 2 and 3 per ClimatePartner. The brand reportedly offsets its remaining carbon emissions through the removal of ocean plastic in partnership with Plastic Bank, as well as through the support of wind energy projects.

Meanwhile, suppliers have introduced new tools for brands to meet their waterless care goals. For instance, Vantage's low-energy Jeesperse NoLo emulsification system can reportedly help formulators reduce the number of ingredients they use by half (more on that later), while streamlining manufacturing. The Jeesperse NoLo range includes two powder products, Jeesperse NoLo N1 and Jeesperse NoLo C2, which use no or low mixing energy in the emulsion process. The Jeesperse NoLo base compositions also contain conditioning ingredients that contribute to the efficacy of hydrated formulations in hair and skin care applications.

Elsewhere, Inolex's AminSensyl Ultra MB is a COSMOS-approved conditioning agent that acts as a sustainable BTAC replacement, per the supplier. This non-quat complete conditioning system features a cationic amino lipid technology that creates luxury textures and provides deep moisturization. It is reportedly ideal for soft, weightless conditioning that smooths, defines and strengthens hair.

5. Less is More

In recent years, skinimalism took over many shoppers' mindsets around not only the number of products they used but also the number of ingredients included in those products. Now it's hair care's turn. P&G's Head & Shoulders brand recently launched BARE, a nine-ingredient anti-dandruff shampoo that is said to "get the job done with no trade-offs."

According to the company, some consumers worry that products with long ingredient lists could further irritate their already aggravated scalp. In a recent survey by Head & Shoulders, more than half of respondents (n = 1,000 adults, 18-44 years old and experiencing scalp issues) had the misconception that anti-dandruff shampoos damage their scalp and that DIY home treatments are a more effective for scalp concerns.

In response, the brand launched BARE. Ingredients include: zinc pyrithione, sodium cocoyl isethionate, lauramidopropyl betaine, cellulosic polyquaternium, acrylate, citric acid, fragrance, sodium benzoate and water. The product is available in two variations: Pure Clean uses a coconut water-scented formula for those with an oily scalp and hair; Soothing Hydration is an orchid- and aloe-scented formula for those with dry scalp and hair.

In addition to a minimized list of nine ingredients, the product is packaged in a recyclable bottle that contains 45% less plastic per ml versus the company's conventional 370 ml bottle. ■

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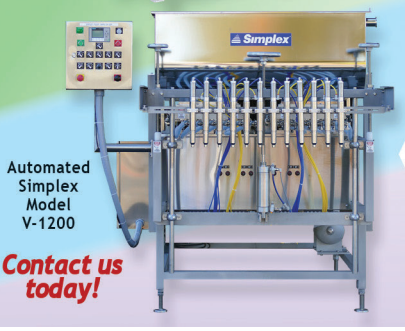
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SMART MOUTHS: ORAL CARE GETS BEAUTIFUL

New ingredients, product formats and tools are tackling oral health holistically

BY LISA DOYLE



Oral care has gone from basic standard hygiene to part of a thoughtful beauty and wellness routine.

It's long been a given in the personal care industry that total body wellness is the goal of most consumers. A healthy outward appearance signals health on the inside, and it all starts with the gateway: the mouth. In recent years, oral care has gone from basic standard hygiene to part of a thoughtful beauty and wellness routine, and new brands are partnering with some of the personal care industry's biggest innovators to deliver better tech, better flavors, better ingredients and better results. Let's talk about what's new and what's on the horizon in oral care trends to watch.

Emerging Ingredient Innovation

As seen across the board in personal care, ingredients with a nod to both leveled-up functionality and sustainable sourcing resonate most with savvy consumers.

"The booming of biotech and fermentation-processed ingredients are heavily influencing the consumer's purchasing decision," asserts Joseph Shieh, head of global marketing, Evonik. "Product safety is often an important claim along this trend as consumers are increasingly seeking oral care products that avoid synthetic or potentially harmful substances."

This spring, the company launched Sophance LA-A, a glycolipid biosurfactant derived through fermentation of sugars, which are solely renewable feedstocks. Extra mild and with low foam, the ingredient features strong cleansing properties and is designed for mouthwash applications.

A recent example of the marriage of nature and tech for gum care is Ashland's recently launched Saffragyl, a 100% natural extract from upcycled saffron flowers.

"At Ashland, we see gum health as the new oral health," says Justine Cotton, global marketing manager, biofunctionals. "Saffragyl biofunctional has been specifically selected to neutralize the gingipain toxin, produced by the bucco-dental pathogen to help protect the gums from signs of gingivitis in-vitro. It helps protect and reinforce gum barrier."

Ashland has introduced a new daily gum care beauty concept collection formulated with Saffragyl, featuring a gel, serum, mouthwash and toothpaste.

Elsewhere, fighting the root causes of poor dental health is always key. Dental biofilms—the source of plaque, tooth discoloration, bad breath and periodontitis—are caused by oral bacteria on the surface of the teeth. Ichimaru Pharcos has launched Milltect, a seaweed-derived oral care active ingredient designed to prevent biofilms from adhering to teeth. According to the company, Milltect is recommended for gel, paste and liquid-type toothpastes, as well as mouthwash and spray-type oral care applications.

One major emerging brand that's maximizing nature-powered tech is Boka. The brand is the biggest consumer in the United States of nano-hydroxyapatite, also known as n-Ha.

"The pioneer ingredient [n-Ha] trades in fluoride and creates the foundation of teeth and bones, meaning Boka's formula is naturally restorative and safe for sensitive teeth," explains Nisha Karma, head of brand at Boka. "Found in nature's micro-calcium component, nano-hydroxyapatite has the same chemical makeup as enamel, with capabilities of covering small pores in your teeth's enamel. All Boka products are non-toxic, fluoride-free, paraben-free, SLS-free, and free of artificial flavoring and endocrine disruptors."

This superstar ingredient can be found through Boka's collection of toothpastes, ranging from Ela Mint to Lemon Lavender.



"All Boka products are non-toxic, fluoride-free, paraben-free, SLS-free, free of artificial flavoring and endocrine disruptors," says Nisha Karma, head of brand at Boka.



Boka is the biggest consumer in the United States of nano-hydroxyapatite, also known as n-Ha.



Featuring hydroxyapatite to protect enamel while preventing demineralization, Dr. Gabe's Glow Up Kit includes a toothpaste and mouthwash, plus an exclusive toothbrush.



Flaus is the world's first electric flosser and a finalist in Fast Company's 2023 World Changing Ideas Awards.

In a similar vein, this spring saw the launch of an oral care line from celebrity dentist Gabe Rosenthal, DDS. Featuring hydroxyapatite to protect enamel while preventing demineralization, Dr. Gabe's Glow Up Kit includes a toothpaste and mouthwash, plus an exclusive toothbrush. The brand's vegan formula also features a blend of wintermint, spearmint and peppermint essential oils.

Floss Goes High-tech

As we see throughout the beauty business, the appeal of high-tech at-home accessories is on the rise—and the oral care category is no different. Water-based flossers and electric toothbrushes have secured their spots on countertops for years, but a new device is sure to disrupt the category.

Enter Flaus, the world's first electric flosser and a finalist in *Fast Company*'s 2023 World Changing Ideas Awards. Flaus uses real dental floss and operates with 10,000 sonic vibrations per minute to move between the teeth and remove plaque and debris while massaging the gums. Featuring an ergonomic handle, the device is designed to increase daily flossing while decreasing the amount of actual floss needed for use by about 95%.

Cocofloss has been making floss effective and eco-friendly since 2015. The line previously sold online and in specialty retailers, and announced in March 2023 its expansion to CVS stores across the United States. In addition to toothbrushes, the brand is known for its unique flosses, with each pack comprising more than 500 woven, textured threads designed to latch onto and remove stubborn plaque. The brand also sells refills, helping to cut down on unnecessary packaging waste.

Just for Kids

Personal care products designed for children can be a win all around: kids develop healthy habits, plus trust in a brand is established early on,



Cocofloss has been making floss effective and eco-friendly since 2015.



SuperMouth is a newly launched mouthcare system for kids, and includes age-appropriate toothbrushes, toothpastes, floss products, mouthwashes, mouthsprays, tongue scrapers, coordinated accessories, educational resources and more.

potentially leading to lifelong devotees of the brand's offerings.

Boka is appealing to the next generation by introducing kid-friendly toothpaste flavors, featuring the same top wellness benefits that adults enjoy.

"Watermelon Mint is not a training toothpaste by any means—we believe kids deserve the best and the safest," says Karma. "It tastes like a juicy blend of summer fun. Our new kids' toothpaste follows the growing success of Orange Cream and helps fortify enamel, supports a healthy smile and puts the fun back in healthy routines."

SuperMouth is a newly launched mouthcare system for kids and includes age-appropriate toothbrushes, toothpastes, floss products, mouthwashes, mouthsprays, tongue scrapers, coordinated accessories, educational resources and more. The system ships every three months as a subscription and includes customized boxes by age, from babies through teens, plus specialty orthodontia boxes for those with braces—and even a kit for pregnant moms.

What's Next

Expect to see further innovation in terms of ingredients and tech in oral care; we've only scratched the surface of what's possible.

"In late 2023, Ashland will be launching a novel, nature-derived ingredient to enhance retention of flavors, colors and active ingredients from oral care products for longer-lasting efficacy," says Ann Druffner, director of marketing, oral care at Ashland. "We have demonstrated in-vitro retention of several actives as well as flavors. The new water-soluble ingredient is easily formulated into toothpastes, mouth rinses and sprays, and will meet the market to prevent oral care problems or extend freshness while being good for the planet when formulated into oral care products."

We'll see more products that make brushing and flossing feel more like a beauty routine and less like a habitual chore. And, in the same spirit as beauty subscription boxes, we'll see an uptick in oral care products suitable for gifting.

"Stay tuned for Boka's first Holiday line," says Karma. "With a fun, limited-edition, holiday-inspired flavor and a kit designed to help you melt away all that holiday tension that you hold in the jaw, there will be something for everyone!"

Brands that take note and follow suit will surely have ample reasons to smile. ■

Want more from this author?

Check out ***Rethinking Nutricosmetics Inside Out*** *in our* ***May 2023 edition.***





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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BEAUTY SHOPPERS REVEAL THEIR PACKAGING ATTITUDES

What 3,500 beauty consumers say about preferences and expectations.

BY DENISE HERICH, The Benchmarking Co.

Forty-six percent of U.S. female beauty and personal care buyers admit that a product's packaging is influential or very influential to their purchase decision; make that 50% for millennial and Gen Z buyers. Whether that package is primary or secondary, sustainable, refillable, made of plastic or glass, the vessel containing the product plays a vital role in attracting her attention enough to learn about its contents and to buy.

To understand the consumer viewpoint on packaging, The Benchmarking Company surveyed more than 3,500 U.S. beauty consumers in July 2023 about their attitudes and preferences toward packaging of all types. Here's what we found.

Shopper Profile: Retailers & Products

To begin with, Superstores like Target and Walmart (71%) and *Amazon.com* (68%) remain the top places where U.S. females of all age groups purchase beauty and personal care products on a regular basis (**T-1**). Stores like Ulta/*Ulta.com* (56%), Sephora/*Sephora.com* (50%), drug stores (40%) and

Thirty percent of millennial and Gen Z beauty buyers enjoy filming their unboxing experience and then posting the video on social media, casting an important spotlight—that could go viral—on the package itself.

specific brand websites (34%) round out the most frequent retailers she buys from. The top products she's buying include facial skin care (92%), shampoo/conditioner (91%), body skin care (83%), lip color (66%), fragrance (65%), sunscreen (63%) and eye shadow/color products (59%).

The Unboxing Experience Decoded

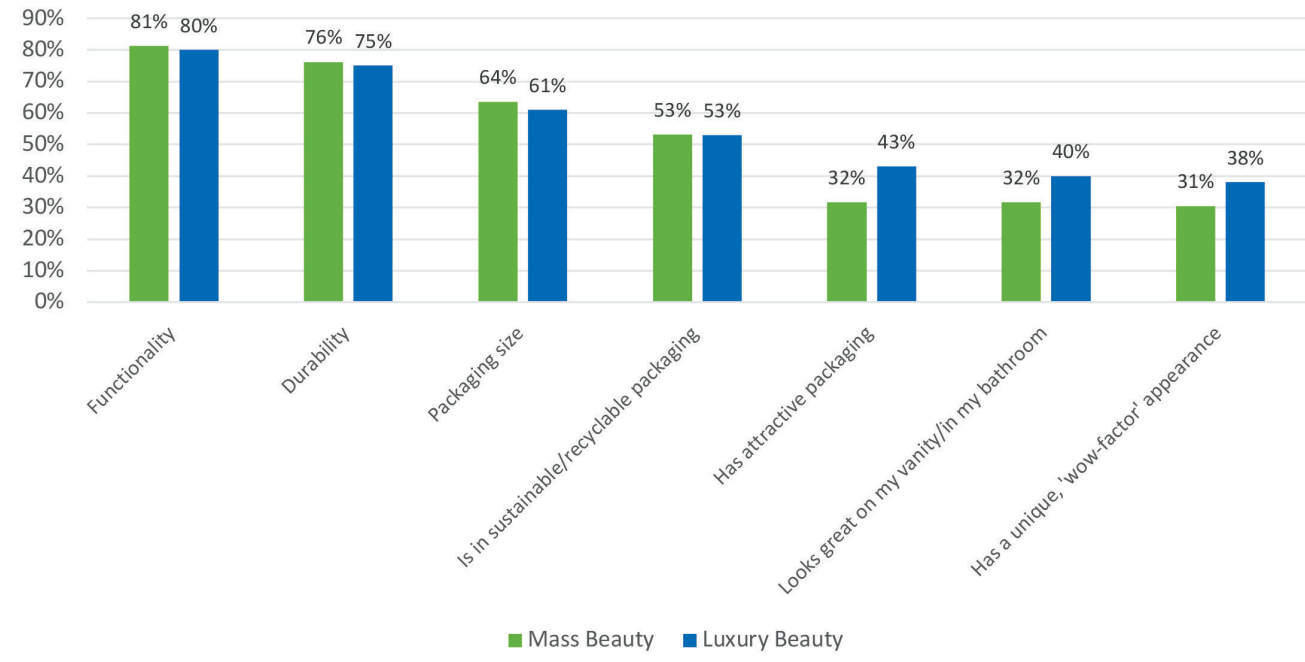
Millennial and Gen Z buyers are most likely to have products delivered (96% of them have done so, compared to 94% of all age groups), because they buy from *Amazon.com* (73%) and other online retailers more often than older age groups.

When these buyers receive their packages in the mail, 88% first open the external packaging to check for any product damage, then read the information on the front and back of the package (85%), recycle the packaging material if possible (71%), and then discard the rest (34%).

T-1. Where U.S. consumers regularly shop for beauty/personal care products (all age groups, 2023)

	%
Superstore (i.e., Target, Walmart)	71%
Amazon.com	68%
Ulta or *Ulta.com*	56%
Sephora or *Sephora.com*	50%
Drug store	40%
Specific brand website	34%
Discount department store (i.e., TJ Maxx, Marshall's)	31%
Grocery store	19%
Department store (i.e., Bloomingdales, Belk's)	16%
Subscription box (i.e., Ipsy, Glossybox)	16%
Big box store (i.e., Sam's Club, Costco)	16%
Beauty specialty store (other than Sephora or Ulta)	14%
Luxury department store (i.e., Neiman Marcus, Nordstrom, Saks)	14%
Beauty online retailer (i.e., dermstore, netaporter.com)	9%
Direct sales (i.e., Avon, Rodan + Fields)	8%
Salon/spa	7%
Home shopping channel (i.e., QVC, HSN)	6%
Other (write in)	2%

F-1 Packaging expections: mass vs. luxury



Thirty percent of millennial and Gen Z beauty buyers enjoy filming their unboxing experience and then posting the video on social media, casting an important spotlight—that could go viral—on the package itself.

Mass vs. Luxury Packaging Expectations

Whether a beauty product is mass market or premium priced affects the consumer's viewpoint on the product's package aesthetic. Luxury products are expected to be more attractive, with a stronger "wow-factor" (**F-1**).

What's Expected and Important

While an attractive package is important, packaging that's protective of the product inside and that displays easily readable product benefits are the most desirable attributes (**T-2**). Packaging that's functional and easy to use, sturdy, leak-proof, easy to open, and minimalistic round out her top packaging must-haves.

Sustainably made packaging that's biodegradable or compostable isn't as high on her list as pure functionality; still, beauty buyers look for these types of packaging when considering the purchase of a product. Specifically, buyers seek out recyclable packaging (43%) and packaging that's reusable (28%) and sustainably made (25%). Notably, 84% of all beauty buyers—and 88% of those buyers millennial age or younger—say they might be or would be more inclined to try a beauty brand's product for the first time if they saw that its package was sustainably made. That said, 40% of all consumers just look for the product they intend to buy regardless of the actual packaging material.

A brand's commitment to the environment, animals, sustainability, and other causes are important for transparency, and buyers want that commitment communicated on package as well.

Easily finding those certifications and seals on the package are important to

AWARD-WINNING COLD FOIL

Premium Label & Packaging Solutions' Overnight Labels has received a bronze award at the Foil & Specialty Effects Association's (FSEA) 30th Annual Gold Leaf Awards for best use of cold foil (label or carton).

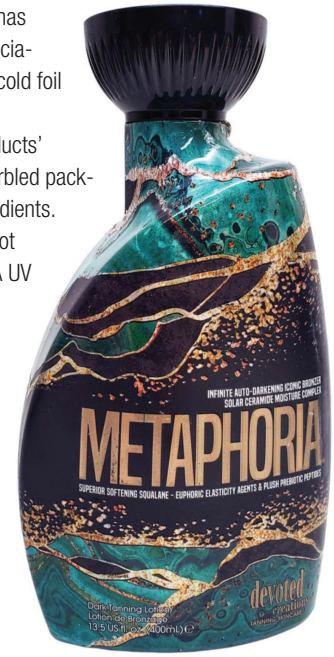
The winning label is a shrink sleeve produced for OL Products' Metamorphia Tanning Lotion. The green, black and gold marbled packaging design is intended to evoke the product's luxury ingredients.

Overnight Labels used a holographic foil and applied a spot matte to sections of the black in order to achieve the look. A UV silkscreen was applied to the gold to add dimension and a tactile effect, which reportedly increased the complexity of the printing process.

The award took into account service providers' use of specialty finishing techniques, including foil stamping, embossing, specialty coating, film laminating, laser cutting, die-cutting and cold-foil applications. A record number of entries were reportedly received from the United States, Canada, India, Italy, Switzerland, Poland, Denmark, Japan, South Africa and Taiwan.

"We always strive to maintain a level of excellence for everything we print, especially when a job calls for intricate details," said Chris Payne, CEO of Premium Labels & Packaging Solutions. "We are honored that the judges recognized us for our craftsmanship."

"Our FSEA Gold Leaf Awards Competition showcases how embellishments have become a catalyst in the printing industry," said FSEA executive director Jeff Peterson. "The creativity and technology used in the pieces we receive continue to amaze us every year, from greeting cards and book covers to folding cartons and labels." ■

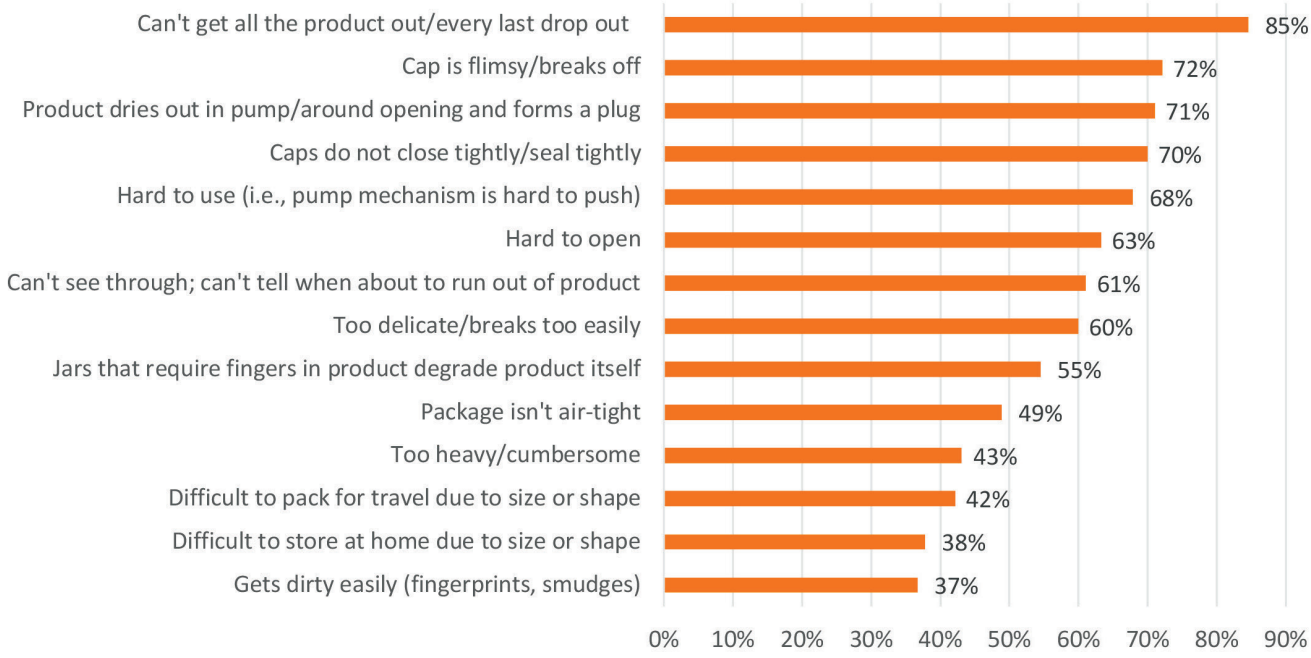


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T-2. Top beauty/personal care packaging attributes

	%
Packaging is protective of the product inside	61%
Product benefits are listed on the package	61%
Packaging is functional, easy to get the product out	59%
Packaging is sturdy/leak-proof	51%
Packaging is easy to open	45%
Packaging is minimalistic/not wasteful	44%
Attractive packaging	43%
Packaging lists certifications, i.e., cruelty-free, paraben-free, etc.	30%
Product claims are visible on the package	26%
Package is made of recyclable materials	25%
Sustainable packaging	24%
Comes in travel sizes	16%
Packaging is biodegradable	9%
Packaging is compostable	5%

F-2 Consumers' top packaging frustrations



her purchase decision, with the Leaping Bunny or cruelty-free symbols being at the top of her list. Certifications and seals of importance include:

- 59% cruelty-free
- 38% made in the USA
- 33% recyclable
- 24% made safe
- 21% non-GMO-certified
- 20% ocean-friendly certified
- 20% USDA organic
- 19% fair trade
- 13% PETA-approved
- 12% vegan

Materials and Form Factors

A product's packaging material, as well as its form factor, is integral to shoppers' purchase decisions. The following forms and materials are preferred by buyers for these products:

- Facial skin care: #1 glass; #2 push pump bottles; and #3 jars
- Body skin care: #1 push pump bottles; #2 tubes; and #3 plastic bottles
- Shampoo/conditioners: #1 plastic bottles; #2 push pump bottles; and #3 tubes
- Fragrance: #1 glass; #2 push pump spray; and #3 rollerball
- Eye shadow/color: #1 palette; #2 compact; and #3 stick
- Lip color: #1 stick; #2 tube; and #3 rollerball
- Sunscreen: #1 tube; #2 aerosol spray; and #3 plastic bottle

Color Preferences

Functional package designs (49%), those that are minimalistic (35%), modern (31%) and feminine (25%) draw consumers to a package, in addition to its use of color.

Seventy-three percent of all beauty consumers say a product's package colors sometimes or always have an influence on their decision to purchase a product for the first time. For millennial and Gen Z buyers, packaging color is even more important, with 79% admitting color's strong influence on their buying habits.

Specific packaging colors that draw her in include rose gold (45%), pink (45%), iridescent colors (35%), violet/purple (33%), teal (29%), white (26%), gold (24%), multi-color (24%), silver (23%) and black (20%).

Avoiding the Frustration Factor

While an attractive or sustainably created package may influence her first-time buying decision, functionality must rule because frustration with primary package functionality can often lead to a one-and-done purchase. Avoiding these common packaging pitfalls can lead to a long-term brand relationship with your consumer. What should you look out for? Check out the data in **F-2**. ■



Based in sun-seared San Diego, **DENISE HERICH** is co-founder and managing partner at 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, focus groups, its annual PinkReport, and consumer beauty product testing for marketing claims.

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Packaging Trend Tracker: Consumer Sustainability Buy-in

From monomaterial glass to a boom in North American regional offerings, packaging firms are boosting sustianability and speed.



Nearly 80% of consumers say sustainability is a key purchasing decision factor.

Consumers want sustainable products and packaging, but their behavior is lagging.

Nearly 80% of consumers say sustainability is a key purchasing decision factor, according to a new survey from Canadian beauty brand BareLuxe. However, just 23.4% of those shoppers currently use refillable skin care products.

By product category, less than 1% of consumers are using refillable perfumes, while fewer than 5% are using refillable serums, lotions and other personal care products. The portion of consumers using refillable makeup made up the remaining portion of shoppers using refillable formats.

Why the chasm between belief and behavior? BareLuxe's data found that more than 50% of shoppers have difficulty finding available options, while nearly 37% say their favorite brands do not currently offer refillable options. (In fact, 43% of respondents said they would switch to refillables should their preferred brands adopt them.)

Other shoppers are concerned about a perceived risk of contamination and spillage (31%), while 17% doubt the sustainability of refills.

What would move the needle? Per survey respondents, 34% want substantial proof of impact of refillables, with the same portion seeking competitive pricing.

"There's a clear need for more transparency, collaboration and shared understanding between brands, retailers and consumers," says Heather Smith, MD, founder and CEO of BareLuxe Skincare. "To truly make a difference, we need unity in our objectives and consistency in our efforts."

Transparency and truth (i.e., no greenwashing) will be critical in this process, particularly in capturing Gen Z shoppers, per Mintel[a]. According to the firm, 58% of Gen Z survey respondents "don't believe mainstream brands that say they are sustainable." The solution: brands must use clear, accurate language in describing the state of their products' sustainability and back everything up with evidence.

Packaging suppliers are doing their part, developing solutions with clear sustainability benefits. Here, we round up a number of recent launches.

Many Paths to Sustainable Packaging

Cosmopak recognizes that every brand's sustainable journey will be different. Its new Rooted in Beauty packaging collection therefore features an array of sustainable formats, including monomaterial, biodegradable and refillable formats, as well as sustainable materials like glass, metal, wood, paper, PCR and biomaterials.

The wide range allows brands a large variety of ways to approach sustainability in a way that aligns with their values, leveraging sustainable packaging and/or offset options.

Sustainable Materials

Cosmopak's collection includes packaging made with sustainable materials, including:

- aluminum tubes
- glass packaging, including a 50 ml glass bottle dropper, airless glass bottles with a bag on valve system and a 100 ml glass bottle with pump

Monomaterial Formats

Rooted in Beauty features monomaterial designs, including:

- 36 ml monomaterial PP dropper
- one-piece monomaterial PCR tube
- monomaterial PET stackable compact

[a]www.mintel.com/consumer-market-news/the-future-of-consumer-behaviour-in-the-age-of-gen-z/



Cosmopak recognizes that every brand's sustainable journey will be different. Its new Rooted in Beauty packaging collection therefore features an array of sustainable formats, including monomaterial, biodegradable and refillable formats, as well as sustainable materials like glass, metal, wood, paper, PCR and biomaterials.

- 5 g monomaterial PET lipstick
- one-piece large monomaterial PP compact
- monomaterial tin compact with a stainless steel mirror

Refillables

Rooted in Beauty offers refillable formats, including:

- 30 ml and 50 ml refillable aluminum deo stick
- 50 ml aluminum refillable deo stick
- refillable mascara vial
- refillable lip gloss vial

Post-consumer/Recycled Materials

Cosmopak's collection taps an array of post-consumer materials, including:

- ocean-bound plastic tubes with a comb applicator
- 50 g chemically recycled resin jar
- 50 g mechanically recycled PCR jar

Bio Materials

Rooted in Beauty features designs in a number of bio-based materials, including:

- round and rectangular wooden compacts
- bio-resin tube
- 80 ml paper tubes with ethylene vinyl alcohol (EVOH)
- 80 ml bamboo tube with EVOH
- stackable paper pulp compacts

"We are excited to introduce our Rooted in Beauty packaging collection, which reflects our dedication to sustainability and innovation," says Dan Wolfe, SVP of business development at Cosmopak. "Through our Ecoforward framework, we aim to empower beauty brands to make conscious choices that align with their sustainability goals without compromising on creativity, functionality, or brand aesthetics."

Monomaterial Packaging Expands

As the Cosmopak collection shows, monomaterial concepts are increasingly desirable and offered in a wide range of formats.

Monomaterial Lip Pack

Quadpack's top-filling monomaterial Emerald Lipstick is designed around a sense of "minimalist elegance" that aligns well with recent "quiet luxury" aesthetic trends.

The launch comes at a boom time for the lip color category. According to Circana data, the segment was the

fastest-growing prestige color category in the United States in Q1 2023, up 43% year-over-year. Notably, higher-priced lip brands grew at an even faster pace.

The new Quadpack lipstick is available in a square or cylindrical shape, with a choice of materials, including recyclable PET and as much as 100% recycled PET (rPET).

The smooth-working mechanism is POM-free for improved recyclability. Its 12.7 mm cup is compatible with most lipsticks on the market, per Quadpack, with a capacity of 4.0-4.5 g.

The Emerald Lipstick can be decorated with silk screening, hot stamping, matte spray and pearl varnish to further promote an aesthetic of simplicity and restraint.

The pack can be used to house color cosmetics, of course, as well as skin care such as balms and solid fragrances.



Quadpack's top-filling monomaterial Emerald Lipstick is designed around a sense of "minimalist elegance" that aligns well with recent "quiet luxury" aesthetic trends.

Monomaterial Droppers and Covers

Lumson's monomaterial Eco Dropper comprises PP collars and pipettes (the components can be made with PCR PP). The seal is composed of polyolefin, an elastomer that is purportedly compatible with the PP recycling chain. The design is offered in original and colored variants and can be easily recycled at the end of its life, per the supplier. At the same time, the monomaterial composition reportedly doesn't compromise technical performance or precision dosing. The Eco Dropper can be combined with PCR glass bottles for fully sustainable packaging. Compared to a standard dropper with TPE seal, urea collar and glass pipette, the CO_2 emissions used for production are reduced by 29%, per Lumson.

Meanwhile, Lumson's new PP monomaterial cover—outer/inner/sealing gasket—are made of a single material and designed to avoid visual aesthetic defects. The cover can be combined with the Slim 58-diameter bottle and the De Luxe 66-diameter bottle in both standard and refillable versions, per the supplier. The components can be made of PCR PP.



Lumson's monomaterial Eco Dropper comprises PP collars and pipettes; its new PP monomaterial cover—outer/inner/sealing gasket—are made of a single material and designed to avoid visual aesthetic defects.



Quadpack's new monomaterial PP Duetto Jar features a double-chamber design that can house two formulas side-by-side in 40 ml compartments.



Seacliff Beauty is now using #Tide ocean-bound PET, PP, HDPE and LDPE plastic in a range of packaging designs for skin care, color cosmetics and hair care.



Zignago Vetro's new rounded Giotto Duo is reportedly the first glass packaging on the market to offer an integrated glass separator.

Compared to a conventional Lumson PETG cover, the monomaterial version reportedly reduces CO_2 emissions by 28% and the use of minerals and metals by 93%, per a SPICE analysis.

Monomaterial Double-chamber Jars

Meanwhile, Quadpack's new monomaterial PP Duetto Jar features a double-chamber design that can house two formulas side-by-side in 40 ml compartments.

The format is reportedly ideal for mask sets, night and day creams, travel essentials, and other duo products.

Its PP content renders the pack compatible with a wide array of skin care, per Quadpack. The monomaterial design also makes the jar more easily recyclable.

The jar is available in variants with up to 44% PCR, which can boost the lifecycle score of the packaging by as much as 300% compared to the virgin PP version, while also reducing water usage and carbon output.

The jar's walls, chambers, shive and cap can be decorated; options for the Duetto Jar include color matching, spray coating, hot stamping, metallization and silk screening.

Monomaterial Glass for Color Cosmetics & More

Zignago Vetro's new rounded Giotto Duo is reportedly the first glass packaging on the market to offer an integrated glass separator. The separator renders the pack as monomaterial and therefore fully recyclable.

The monomaterial design conserves cosmetic products due to glass's inherent chemical stability and inertness.

The Giotto Duo design can contain two products in one, kept discrete with the glass separator. The glass design allows consumers to clearly see the product in the pack.

Giotto Duo can be customized and paired with a range of accessories, including a series of caps.

Zignago Vetro notes that the glass separator can be applied to shapes other than the current container, giving brands an array of possibilities.

Eco-friendly Materials

Ocean-bound Plastic

Seacliff Beauty is now using #Tide ocean-bound PET, PP, HDPE and LDPE plastic in a range of packaging designs for skin care, color cosmetics and hair care. The ocean material is reportedly a functional replacement for virgin plastics due to #Tide's mechanical upcycling, which renders plastic waste to a virgin level. Norwegian tech company Empower tracks the flow of the ocean material from collection to regeneration via a public blockchain to ensure transparency and security of the supply chain. The tracking allows Seacliff Beauty to provide a material passport to customers to verify material quality and provenance.

Compostable Bamboo

Element Beauty Group recently developed a refillable and compostable bamboo palette for Caliray. Marketed under the Endless Sunset moniker, the palette features talc-free, long-wear, multipurpose eye and cheek formulations featuring magnesium myristate, amino acids and rice extract.

Element also designed the pack for the brand's Come Hell or High Water volumizing mascara, featuring argan oil. The current iteration features 100% ocean plastics; a future iteration could reportedly feature recycled PCR fibers for the brush, thereby rendering the entire mascara pack entirely composed of recycled materials.

Beyond formulations and sustainable packaging, Caliray participates in the Pact Collective packaging reclamation program.

"We need to educate consumers about the value of science and research in beauty," says Caliray founder Wende Zomnir.

Rice-based Packaging

Spain-based Novsus has developed 50 ml cosmetic jars that comprise 30%

rice husk (under the Oryzite trade name) and 70% PP. As the technologies develop, those percentages could shift further in favor of husk content. As it stands, the current design reportedly reduces emissions by more than 70% compared to jars made only with PP. The jar's dimensions are 70 mm x 49.2 mm, with a lid thickness of 1.6 mm and jar thickness of 4.2 mm, and a weight of 41.1 g.



Spain-based Novsus has developed 50 ml cosmetic jars that comprise 30% rice husk (under the Oryzite trade name) and 70% PP.



Element Beauty Group recently developed a refillable, compostable bamboo palette for Caliray.



Seacliff Beauty is now using Eastman Cristal Renew copolyesters for a range of packaging offerings, delivering high levels of recycled content without sacrificing clarity, luster, color compatibility or durability.



Cameo Metal Products has launched a range of aluminum jar covers with matching glass jars.

Carbon-capture Packaging

Element Beauty Group has opened a new front in the packaging world, tapping a new CO_2 Captured certification that declares compliant components as carbon-neutral. The Group's Element Material Science division has incorporated captured carbon solutions into its product offerings, sequestering CO_2 that would otherwise end up in the atmosphere.

CO_2 Captured verifies its activities with third-party audits to verify the carbon capture, removal and utilization of materials used in Element Packaging's offerings.

"The purpose of circular materials is to provide improved performance with lower carbon impact," says Nick Gardner, co-founder of Element Packaging. "We are currently using it with LDPE and HDPE (low density and high density polyethylene), and PP (polypropylene), but the possibilities are infinite. We focus on applications with tubes, deodorant sticks, tottles [and] PP mascaras components, which are less likely to be recycled because of the sheer physical size. Our partnership allows us to make packaging with fully sequestered carbon, which also increases durability, recyclability and material performance."

Expanding Glass Jars & Aluminum Covers

Cameo Metal Products has launched a range of aluminum jar covers with matching glass jars. The jar covers range in size from 28 mm to 89 mm and are available in a variety of colors and finishes, including shiny, matte and brushed. The jars, meanwhile, are available in capacities ranging from 7.5 ml to 200 ml and feature clear, frosted and painted finishes, as well as decorative options such as silk screening and hot stamping. The range is available via the supplier's Impacked digital storefront.

Molecular Recycled Material

Seacliff Beauty is now using Eastman Cristal Renew copolyesters for a range of packaging offerings, delivering high levels of recycled content without sacrificing clarity, luster, color compatibility or durability. The copolyester is manufactured using Eastman's molecular recycling, diverting content from landfills and cutting greenhouse gas emissions, per the supplier. Eastman Cristal Renew copolyesters are available with 30% and 50% certified recycled content and are featured in an array of Seacliff Beauty jars, airless packs and droppers.

Sustainable Airless

Paper Airless Packaging with a Low Environmental Impact

Lumson has launched XPaper, paper airless packaging with a multi-layer pouch that protects formulas from contamination. The design allows for the packaging's plastic components to be separated from the paper components to simplify recycling and material recovery once a product is finished.

The paper bottle is about 50% lighter than an equivalent PET bottle and uses 47% less plastic and reduces

CO_2 emissions by 34%. There is also a 92% reduction in the use of resources, minerals and metals. This comparison is according to a SPICE analysis comparing a 50 ml XPaper bottle with a Lumson PET bottle of the same size.

XPaper packaging can be personalized with offset printing (up to six colors) and hot stamping effects.

The packaging was developed in partnership with Politecnico di Milano Foundation and the technical and scientific support of Professor Luigi De Nardo's research group in the Department of Chemistry, Materials and Chemical Engineering.

"Cosmetic companies aiming to reduce plastic use in their products by replacing it with paper-based solutions now have a new solution available," says De Nardo. "XPaper represents a new piece in the development of a comprehensive and sustainable strategy for cosmetic packaging. Each functional element of the packaging has been designed to meet product requirements and promote post-consumer recycling. In particular, the paper bottles are made using certified paper from sustainable sources and fully meet the structural requirements for product containment. They are also easily taken apart for recycling with paper and cardboard."

New PET Airless Jar

Quadpack recently released a PET version of its 50 ml Regula Prestige Airless Jar. The format is ideal for face creams and baby products, as well as other formulations requiring protection via the pack's bag-in-bottle airless system, which features up to six barriers. The jar allows for precise dosing of 0.5 ml per stroke, according to Quadpack, as well as high restitution rate. The top-filling jars, which are compatible with most filling lines, are manufactured at Quadpack's manufacturing facilities in Germany and can accommodate a range of finishes. The new PET version is available with a cap and jar in recyclable PET and a PP pump. A PCR PET version is currently under development for release later in 2023.

Versatile PE Airless with Precision Dosing Options

Seacliff Beauty has developed several metal-free monomaterial airless systems available in PE or green PE derived from sugarcane. The airless design prevents oxidation and reduces the need for preservatives, per Seacliff Beauty. The metal-free monomaterial designs allow for easier recyclability. The airless variants include designs with product windows, as well as deco options such as metallization, matte or glossy varnishes, hot stamping, and silkscreen. The company's Sixth Layer technology allows for a metallic layer

MIX-AND-MATCH PACKAGING

Epopack's Mix and Match System provides beauty and personal care brands with a range of combination options. The options are functional and practical, per Epopack, including a range of attachments that can be mixed and matched with various bottles to create preferred combinations for brands. Options include screw caps, reducers, droppers, sprayers, large and small treatment pumps, and matching overcaps. These attachments are designed to fit Epopack's range of bottles. The supplier also offers customization, including printing, custom coloring and hot stamping. ■



Epopack's Mix and Match System provides beauty and personal care brands with a range of combination options.



Lumson has launched XPaper, paper airless packaging with a multi-layer pouch that protects formulas from contamination.



Quadpack now offers a PET 50 ml Regula Prestige Airless Jar.

over the tube that delivers a premium finish, while providing an extra layer of protection in the tube.

Variants include the Sage Airless system range, which provides precise dosing without the need for a pump style applicator. The Sage range, available in an array of sizes, includes different applicators and dispensers for viscosities ranging from hydro-alcoholic solutions to oils to micellar waters to serums to facial gels and creamy lotions.

The UD Pump Airless flexible PE tube system range, meanwhile, is compatible with high SPF formulas and is capable of dispensing micro-encapsulated formulas up to 110 microns smoothly and without breaking, per Seacliff Beauty. The design prevents clogging and keeps air from returning inside the package.

Sustainable Lamination for Paper Packaging

Taghleef Industries' Derprosa laminating films can be bonded to paper and cardboard surfaces, including secondary packaging. The Derprosa DL Soft Touch Prestige reLIFE 30 effect is manufactured with 30% PCR chemically recycled raw materials of circular origin, per the supplier. On secondary packaging, the technology imparts a "peach skin texture" with high clarity that enhances original printed colors. The technology is recommended for finishes such as spot UV, hot stamping, gluing and post-lamination processes. Per the company, the films enhance the durability of packaging, in part by protecting against scuff marks, scratches and scarring, while replacing conventional solutions such as cellophane overwrap films.

North America Gets a Packaging Boost

For brands based in North America, local/regional manufacturing can have a range of benefits, including speed of delivery, fewer supply chain disruptions and, due to proximity, potentially lower carbon footprints and enhanced sustainability. Recently, a number of manufacturers have added or highlighted services for customers in this booming region.

"More so than in the past, due to rising costs of materials, energy and shipping, regional manufacturing has become the preferred method of production," says David Heubach, account manager, Inoac Packaging Group. "Throw in the extra timing that ocean shipments encounter and potential tariff and tax costs, regional manufacturing along with sustainability are the two most important topics that companies are focusing on. "

Inoac's North American services include PET via injection stretch blow molding; PP and PE via IM; and PET, PE and PP via extrusion blow molding. Its in-house decoration options include silk screening, hot stamping, spray tinting and frosting, heat transfer, and pressure-sensitive labeling.

"Being able to partner with local manufacturers more often than not provides better relationships through accessibility and communication, which will help with day to day advancement of projects," says Heubach. "Working with partners in the same or nearby time zones make it easier for travel, providing samples quicker, resolving issues faster, which will all result in shorter lead times."

The executive concludes that today's brands are primarily focused on fast lead times and, of course, low prices, as well as suppliers that can provide the latest innovations and high quality.

In the summer of 2022, Berlin Packaging boosted its regional reach with the acquisition of Chicago-based turnkey packaging firm Jansy. The manufacturer offers everything from



Seacliff Beauty has developed several metal-free monomaterial airless systems available in PE or green PE derived from sugarcane.



Seacliff Beauty's Sage Airless system provides precise dosing without the need for a pump-style applicator.

BEAUTY'S 2 TOP PACKAGING TRENDS DRIVING GROWTH



Inflation, a desire to trial products before buying full-size versions, a propensity for Chinese shoppers to prefer affordable small-format products, and a general desire for travel-friendly, on-the-go products are driving demand for small packs.

Small packs and squeezable tubes are among the top-growing packaging formats desired by shoppers in the personal care and beauty space, according to a new analysis from Euromonitor[a].

The report, from Jeremy Roberts, notes that inflation, a desire to trial products before buying full-size versions, a propensity for Chinese shoppers to prefer affordable small-format products, and a general desire for travel-friendly, on-the-go products are driving demand for small packs.

Meanwhile, the analysis notes that squeezable plastic tube sales grew 3% in 2022, faster than any other format. (That said, folding cartons and HDPE bottles are the top packaging formats in the industry.) The factors driving a shopper preference for tubes are various, including: easy and controlled dispensing/application and related minimization of waste; protection of formulas; lightweight and compact designs; and travel-friendly/on-the-go formats.

The Euromonitor report points out that squeezable plastic tubes will eventually become the second-most popular packaging format in the beauty/personal care industry. At the same time, these tubes are becoming more sustainable, with monomaterial HDPE variants coming to the market.

As for growth prospects for beauty and its packaging, Asia-Pacific, particularly India, China and Indonesia, will lead the way. Demand will also spike in Malaysia, Singapore and Thailand, though North America and Western Europe will remain critical centers for the market. ■

[a]www.euromonitor.com/article/key-trends-and-growth-markets-for-beauty-packaging

in-house design and engineering to manufacturing and logistics partnerships to support the needs of customers. It can also provide product formulation, lab services and testing, blending and filling services, sustainable packaging solutions, and sourcing and logistics. (Per Jansy, product formulation projects can take anywhere from six to 20 weeks, depending on whether the formulation is customized, reverse engineered or simply enhanced.)

While Jansy has a strong U.S. presence in locations such as its home base, New Jersey, Los Angeles and San Francisco, it has established contract manufacturing partnerships with firms in South America and Dubai. It also maintains a global QC team for clients seeking in-process and pre-shipment inspections.

Here's what else is happening in the region.

US-based In-mold Labeling

CSI offers in-mold labeling via its Oxnard, California, facility. The premium decoration technique preprints labels onto a thin layer of polypropylene, the same material as the lid, and places that label into the injection molding process. The label thereby fuses with the lid for a finish that doesn't scratch or peel away. Just as important, the process renders packaging monomaterial and more easily recyclable. CSI's service allows brands to leverage photo-quality graphics as well as glossy, textured matte, metallic or clear finishes.

Recycle-ready Tubes

Albéa Tubes will produce the Greenleaf recycle-ready plastic laminate web in its Brampton, Ontario facility in 2024. To support the roll out, Albéa is investing in new equipment at the Canadian site.

The tubes are certified by the Association of Plastic Recyclers (APR) and RecyClass, ensuring that the packaging is compatible with the existing HDPE bottle recycling streams.



CSI's in-mold labeling process preprints labels onto a thin layer of polypropylene, the same material as the lid, and places that label into the injection molding process.



Albéa Tubes will produce the Greenleaf recycle-ready plastic laminate web in its Brampton, Ontario facility in 2024.

Albéa Brampton will continue to offer ABL foil laminates and laminate tubes for pharmaceutical topical creams and ointments as well as related products.

Bruno de Carvalho, VP and general manager Albéa Tubes America, says, "The transition from ABL to PBL has already started on the market and many brands are committing to switch their tubes to recyclable HDPE tubes within the next three years. Greenleaf is estimated to represent 70% of our tube mix in North America in 2025. It is therefore important for us to stay a step-ahead by providing our customers with local solutions that support their sustainability goals." ■



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