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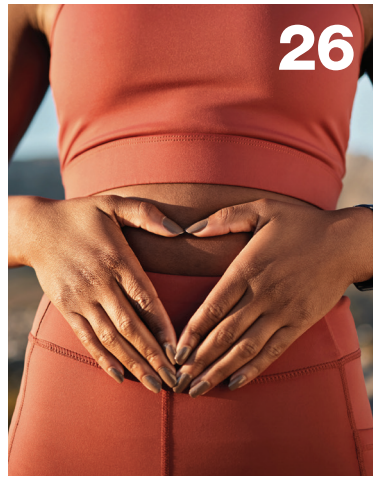
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Beauty Elevated



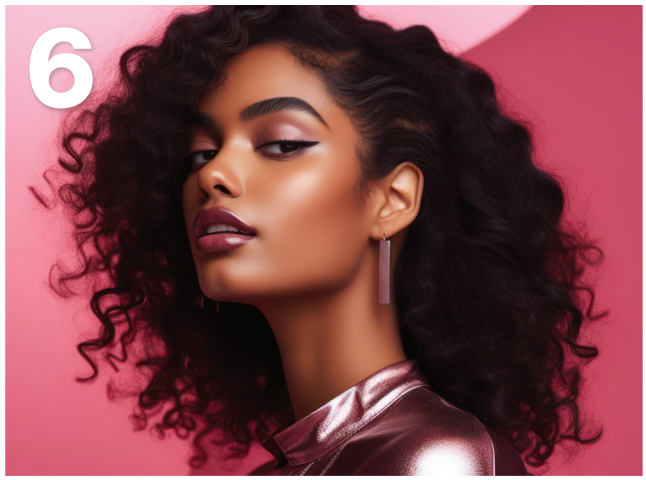
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GLOBAL COSMETIC INDUSTRY®

EDITORIAL

Content Director	Jeb Gleason-Allured | 1-630-344-6069/jallured@allured.com
Editor in Chief	Katie Anderson | 1-630-344-6077/kanderson@allured.com
Assistant Editor	Jacquelyn Mueller | 1-630-344-6059/jmueller@allured.com
News Editor	Tony Scianna | 1-630-344-6070/tscianna@allured.com

SOCIAL MEDIA

Social Media Specialist	Crystal Dentis | 1-630-344-1821/cdentis@allured.com

ADVERTISING SALES

Business Development Manager	Kim Jednachowski | 1-630-344-6054/kjednachowski@allured.com
Advertising Production Manager	Kasia Smialkowski | 1-630-344-6025/ksmialkowski@allured.com

AUDIENCE DEVELOPMENT

Marketing Specialist	Sam Attebery | 1-630-344-6027/sattebery@allured.com
Customer Service	1-847-559-7557/customerservice@gcimagazine.com

DESIGN

Assistant Design Manager	James Fergus
Senior Graphic Designer	Hon Bannapradist
Digital Production Specialist	Kyle Torain

CORPORATE

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The 2024-2025 Beauty M&A Forecast

In a surprise move, 2023 ended with two high-profile acquisitions: Dr. Gross Skincare by Shiseido and K18 by Unilever. Most likely, 2024 will bring more of the same.

A new report from Kearney, "Beauty and personal care: resetting the stage for M&A[a]," notes that 88% of the 130 senior investment professionals surveyed believe beauty and personal care M&A volume will rise over the next two years. Key drivers will be a consolidation of companies seeking external add-ons and synergies for existing brands/businesses.



Facial skin care and devices are among the most desirable beauty category acquisition targets for the next two years; image courtesy Galina Zhigalova at Adobe Stock.

For context, in 2019, beauty and personal care M&A average transaction value peaked at $435 million. This declined somewhat post-pandemic. To compare, for the first half of 2023, transaction average values totaled $326 million, signaling strength in the sector. Among all 2023 transactions, 86% had valuations below $100 million.

As for the most desirable sectors in the M&A sector moving forward, facial skin care dominates, followed by about equal activity in body care, beauty tech/appliances and supplements/nutrition/ingestibles.

Hair care, while not in the top-most active categories, has experienced a skinification boom in deals, expanding from 3% of deal volume in 2018 to 10% in 2023. The K18 acquisition no doubt boosted the final percentage.

Gen Z, which accounts for 30% of beauty and personal care sales, will also drive a focus on non-legacy brands.

In addition, technology-forward companies with data and analytics capabilities will be highly valued. At the same time, DEI-focused brands will be primarily attractive in the North American market.

Other key targets include Chinese companies, as well as those based in North America and Europe.

That said, "geopolitical tensions" may also make investments in South Korea, Japan and India more attractive. Already, the beauty industry has experienced heightened regional activity in India, as evidenced by Sephora's push into the market.

In addition, brands struggling financially amid a wave of indie closures may prove to be attractive "bargain" acquisitions. This could lead to lower multiples in deals.

Meanwhile, following supply chain issues, respondents expect raw material and packaging suppliers and manufacturers to be increasingly "upstream" integrated via new deals.

While luxury and prestige brands remain most attractive to investors, Kearney reports that "executives expect good momentum across price tiers."

"Given financial market headwinds, the year ahead will undoubtedly present a window of opportunity for experienced acquirers," said Gavin Meschnig, Kearney partner and expert in the beauty and personal care space. "In the current environment, decisions about portfolios will separate the winners from the losers. Leading beauty and personal care players will move decisively to adapt their portfolios in an agile way." ■

[a]www.kearney.com/industry/consumer-retail/article/beauty-and-personal-care-resetting-the-stage-for-m-a



JEB GLEASON-ALLURED
Editor in Chief
jallured@allured.com

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INSIDER INSIGHTS:
CONTRACT MANUFACTURING BEAUTY TRENDS & HAIR CARE TRENDS + PACKAGING LAUNCHES

Wellness and hybrid formulations the dominate contract manufacturing space, while scalp care continues to trend in hair care.



Contract manufacturers are noticing a shift toward wellness in the beauty space; image courtesy of Layerform at Adobe Stock.

Featured insiders…

- Accupac
- APC Packaging
- Berlin Packaging
- Federal Package
- International Cosmetics Science Centre A/S, Denmark
- Lady Burd Cosmetics
- Provital
- Jojoba Desert

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CONTRACT MANUFACTURING BEAUTY TRENDS

Global Cosmetic Industry spoke with beauty insiders to highlight what is trending in the contract manufacturing and hair care space, as well as packaging.

Contract Manufacturing Beauty Trends

Michelle Chavez, vice president of innovation, Accupac, says, "Advances in biology, medicine and bioengineering will lead to the next generation of beauty products. Products that prepare for, replace, or extend the effects of professional procedures will continue to trend. Consumers more than ever are looking to medical professionals for science-backed products that work better with our bodies, optimize our natural functions, or mimic what we've lost. But no longer will they accept the harsh side effects like irritation and sensitization that can come with traditional clinical-grade products. Pushed forward by an ever-increasing emphasis on ingredient quality, natural skin care actives are making their way into almost every beauty segment as consumers demand scientifically proven and medical-grade ingredients that are safe, effective and sustainable."

Wellness

Chavez says, "Well-being will continue to evolve in 2024 with a focus on living happier and healthier, more fulfilling lives. We will see wellbeing themes like balance and relaxation progress to be more fun and lifestyle-focused, including an emphasis on joy, laughter, and strength. This all-encompassing holistic view will incorporate not only our physical wellbeing, but our mental, spiritual and intimate wellbeing as well. Consumers will take a more pro-active approach to their health rather than a reactive one. To innovate against stress, hack sleep and achieve holistic well-being, beauty and personal care will continue to explore ingredients that affect mood and have functional benefits. Oral care will become more prominent in the beauty space, and we will continue to learn how it impacts overall health. We will see more focus on the power of fragrance, a deeper dive into the body's natural biorhythms and high-performance ingredients that affect body and mind simultaneously."

Melissa Niebes, president and chief commercial officer, Federal Package, says, "Of course, MoCRA will continue to dominate the discussion, but delays in the timing will continue to spin us around for the rest of the year. That's something we're all going to have to comply with once the full timing and requirements are known. More interesting trends we're being asked to create are following wellness, easy skin care routines that don't take a lot of time but are still extremely effective. We expect this trend to evolve and develop further with the lead up to the Summer Olympics, with supplements and minimalistic, natural looks with muted colors. This is also blending into the use of fewer and simpler ingredients, with transparency being at the forefront. We switched many customers to sustainable palm oil this year, as well as other key ingredients, and expect this to continue. As a result, we're working on solutions to swap out materials that enable claims and better transparency for our brands."

Hybrid Formulations

Samantha Burd, co-owner of Lady Burd Cosmetics, says, "The biggest trend I see impacting our company in 2024 is the creation of hybrid skin care beauty products. Our clients want the best for their clients, and that means creating cosmetics products that 'go to work' while you're wearing them. Cosmetics products now have to serve a purpose that's more than just aesthetics. This could be a foundation with hero ingredients in it, or a mascara that also conditions the lashes while adding length and volume, or a lip oil that hydrates while adding finish. The possibilities are endless." ■

HAIR CARE TREND: SCALP HEALTH

Roni Rot, CEO, Jojoba Desert, says, "In the realm of hair care, one of the most prominent trends we're observing is the increased focus on scalp care. As we head into 2024, the importance of scalp health continues to gain momentum. Consumers are becoming more aware of the need for targeted scalp care products tailored to various scalp types and specific issues. This trend underscores a holistic approach to hair care, recognizing that a healthy scalp is the foundation for healthy hair. Another significant trend is the emphasis on hair shine. There's a noticeable surge in the demand for shine-enhancing hair products. People are looking for solutions that not only impart a lustrous sheen to their hair but also make it softer and more vibrant. This trend is a reflection of the growing desire for products that not only improve hair health but also enhance its aesthetic appeal."

Rot continues, "Aligning with these trends, we've recently launched a couple of innovative products. First is JD Lusteris, a natural emollient derived from Jojoba oil. This product is a testament to our commitment to sustainability and innovation. As a biome-friendly alternative to traditional silicones, JD Lusteris offers multifunctional benefits. It provides an extraordinary silky sensory experience and sebum control properties, which are essential for scalp care. Moreover, it has deep soothing effects and offers benefits for sensitive skin, making it an excellent ingredient for scalp-care products. Our second recent launch is JD Phyto-Or 1%, which features JD Jojoba oil and concentrated phytoene. This product is a breakthrough in anti-aging and performance, perfect for achieving that sought-after hair shine. It not only promotes glowing skin but also contributes to the health and luster of hair. This aligns perfectly with the current trend towards products that enhance hair's natural shine and overall appearance. Both these products represent our commitment to meeting the evolving needs of the hair care market, focusing on scalp health, hair shine, and challenges posed by environmental factors."



Jojoba Desert's JD Phyto-Or 1% is said to help achieve hair shine.

Nina Esposito, area sales and marketing director, Provital USA, says, "The prevailing trends in the hair care ingredient market involve a strong consumer inclination toward personalized and specialized products, along with an emphasis on hair and scalp health. There is a growing awareness among consumers for customized hair care solutions. This is driven by an increased desire for products that are tailored to individual hair and scalp needs. What we will see is the use of advanced technologies such as AI, hair analysis, and scalp diagnosis which will allow brands to offer personalized hair care products. In addition, the skinification of hair care is extending skin care principles to hair care, particularly scalp care. The use of ingredients known for their skin-barrier repairing properties as well as educating consumers on the importance of scalp healthy for hair growth will be mainstream this coming year. Look for ingredients you know are tried and true to show up on hair care products everywhere."

Esposito continues, "Densinaria is a hair volume and strengthening active ingredient derived from *Palmaria palmata*, a well-known, healthy seaweed and skin care ingredient revered for centuries for its nutritional value and proposed for the first time for hair care. It is an active ingredient, enhanced with arginine, 100% natural origin and COSMOS-approved, that addresses hair fiber resistance and split ends prevention allowing for a healthy and volumized mane for longer, in line with

consumers concerns. A restorative action from cortex to cuticle similar to keratin thanks to an increased quantity of reconstructive biomolecules such as proteins and peptides obtained using an enzyme-assisted extraction process which optimizes yield while minimizing environmental impact. The appearance of split ends is more than halved, hair's resistance to breakage more than triples, and hair fiber diameter increases by 25%. It can be used in keratin-like hair solutions to strengthen hair fiber or when hair is weakened by hormonal and stress factors. Let Densinaria inspire your next hair care launch."

Philip Shukla, CEO, International Cosmetics Science Centre A/S, Denmark (ICSC) says, "We have observed increased demands for hair nourishment and anti-hair loss ingredients recently. Previously hair fall and baldness were limited to alopecia or heredity factors whereas now more and more consumers are reporting hair fall due to factors like pollution, stress, hectic lifestyle and fast foods consumption. Multi-purpose hair products with sun protection, anti-pollution and hair nourishment, scalp care claims have launched to cater these concerns."

Shukla continues, "ICSC has launched recently two new ingredients Cosmosil Oil Control I.S. (INCI: *Vitis vinifera* seed oil, *Sclerocarya birrea* seed oil, *Europaea* leaf extract, *Camellia sinensis* leaf extract, *Ocimum sanctum* leaf extract) and Cosmosil anti-pollution oil organic I.S. (*Juglans regia* seed oil, *Aloe barbadensis* leaf extract, *Camellia sinensis* leaf extract, *Curcuma longa* root extract). Both ingredients have antioxidant and anti-inflammatory compounds which reduces free radicals and thus improve hair follicle barrier and scalp moisturization protecting hair from external aggressions like pollution and UV exposure." ■

PACKAGING FOR BEAUTY LAUNCHES

Moira Stein, strategy and insights at Berlin Packaging, says, "Amika recently introduced their 'forever friend' refillable bottles. The custom bottles were created by Berlin Packaging | Jansy and made with impact-resistant, BPA-free and EA-free Eastman Tritan plastic. Compared to using two post-consumer recycled (PCR) bottles in a year, using these refillable bottles reduces packaging carbon footprint by 69%."



Berlin Packaging worked with Jansy to create refillable bottles for Amika.

Stein continues, "Berlin Packaging is helping Babo Botanicals meet its sustainability goals by providing eco-friendly packaging solutions for its Shampoo & Wash collection, including refill pouches and custom bottles made with post-consumer recycled (PCR) plastic. The new 32 oz pouches are made with 30% PCR and use 80% less plastic than two 16 oz bottles. The new 16 oz bottles are made with 100% PCR. Both these solutions help reduce the brand's virgin plastic use and promote a closed loop."



APC Packaging's BRGP refillable glass airless pump.

Erin Gallagher, director of marketing, APC Packaging, says, "Unveiling the EcoReady All-Plastic Airless Pump–Elevate your skin care routine with this groundbreaking design, meticulously crafted from top-tier, durable plastic. Engineered with airless technology, this pump goes beyond the ordinary by eliminating the traditional metal spring, offering a seamless and eco-friendly solution for precise dispensing. Redefine your product experience with innovation that prioritizes both quality and sustainability."

Gallagher continues, "The BRGP revolutionizes the beauty industry by seamlessly merging airless and refillable technologies within a robust, heavy-walled glass container. This ingenious packaging solution stands as a pinnacle of eco-friendliness. At its core, the inner bottle offers both replacement and recyclability, fostering sustainability in every step. Meanwhile, the outer heavy-walled glass bottle and actuator components are designed for enduring reusability, ensuring the product's longevity. Moreover, the system readily integrates PCR (post-consumer recycled materials) to significantly diminish your brand's carbon footprint, underscoring our commitment to a greener future." ■

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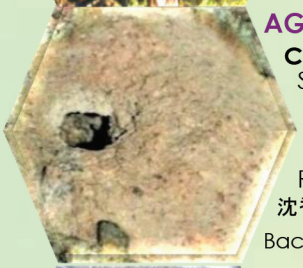
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5-7 Nov 2024	in-cosmetics Bangkok

All of Campo Natural Multi-Functional Active Botanical Extracts, are Compliant to ISO 16128 Natural Indices, And Are Totally Compliant to The Higher Standards of Botanical Food Supplements of FDA CFR21 Part11-(March 2017 Revision) of Botanical Identities, via TLC High Performance-PhotoID., and via C14 Naturalness Assays.

Lonicera Japonica Plant



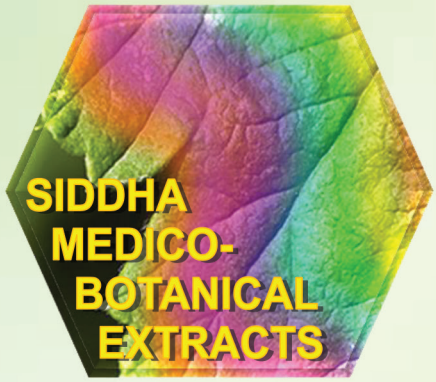
CLINICALLY TESTED VIA IN-VITRO METHODS AS APPROVED BY EU-E.E.C TO BE HARMLESS TO HUMANS
通过使用欧盟-欧共体所认可的体外实验方法，证明该产品对人类安全无害。

CAMPO PLANTSERVATIVE WSr

Lonicera Caprifolium (Honeysuckle) Flower Extract
Lonicera Japonica (Honeysuckle) Flower Extract
忍冬（金银花）萃取液
TSCA Listed | FEMA GRAS Listed | DHHS Listed
A Novel plant based preservative (water-soluble) for cosmetic formulations
独创的植物防腐剂(水溶性)适用于化妆品配方

CAMPO PLANTSERVATIVE WMr (Jojoba Oil)

Lonicera Caprifolium (Honeysuckle) Flower Extract
Lonicera Japonica (Honeysuckle) Flower Extract
忍冬（金银花）萃取液
TSCA Listed | FEMA GRAS Listed | DHHS Listed
A Novel plant based preservative (lipo/oil soluble) for cosmetic formulations
独创的植物防腐剂(脂 / 油溶性）适用于化妆品配方



Colorante-Naturel
天然色剂

Functional Cosmetics Ingredients from Indian Medicinal Herbs
提取自印度药草的功能型化妆品原料

WATER SOLUBLE LIQUIDS 水溶性液体
Brown Red 棕红 Brown 棕 Violet (Blue-reddish) 紫
Green 绿 Red Deep 深红 Ultra Sky Blue 天蓝
White Pearlescent 珍珠白 Red Light 浅红
Dark Ultra Brilliant Yellow 深黄 Yellow Light 浅黄
Dark Black 黑

WATER SOLUBLE POWDERS 水溶性粉末
Dark Brown 深棕 Violet (Blue-reddish) 紫
Light Green 浅绿 Dark Orange 深橙
Dark Ultra Brilliant Yellow 深黄 Yellow Light 浅黄
Ultra Sky Blue 天蓝 Deep Red 深红 Light Red 浅红
Rose Pink 粉红 Dark Black 黑

LIPO & OIL SOLUBLE LIQUIDS 脂/油溶性液体
Brown 棕 Red 红 Natural Yellow 纯黄 Green 绿
Red Light / Scarlet Red 鲜红 Ultra Sky Blue 天蓝
Dark Black 黑

OIL SOLUBLE POWDER 油溶性粉末
Brown 棕 Yellow 黄 Green 绿 Red 红
Ultra Sky Blue 天蓝 Dark Black 黑

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100% Natural Botanical High Purity Permanent Hair – Botanical Colors.
With 100% High Purity Siddha Medico Botanicals Extracts as Natural Color Ingredients and
With 100% High Purity Campo Natural Botanical Additives to Prolong Hair Colors Effects,
For Botanical Permanent, For Botanical Demi-Permanent, For Botanical Semi-Permanent, For BotanicalTemporary

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To better understand the dynamics in the hair wellness category, Global Cosmetic Industry has analyzed recent consumer and market data, cross-referenced with emerging ingredient and product launches, to outline key concerns driving the greatest interest among shoppers; image courtesy of Cultura Creative at Adobe Stock.

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UNRAVELING CONSUMERS' TOP 6 HAIR & SCALP CONCERNS

Prestige hair care demand remained elevated through 2023, according to Circana data[a], led by double-digit growth in most care and styling segments. While mass hair care unit sales varied by category in the same period, the overall picture points to a healthy hair wellness sector. But what concerns are shoppers most focused on? New data points to six key claims opportunities for hair and scalp care brands.

Across every concern area, ingredients and claims are increasingly centered on skin care-inspired innovations.

In 2023, an analysis from Vantage Personal Care noted, "Consumers want hair care products with premium skin care ingredients and are actively seeking out products that contain them." The analysis continued, "Actives in hair care are 'skinspired,' effective and address a multitude of top consumer hair concerns. From dryness to itchy, inflamed scalps to frizzy, damaged tresses, skin care active ingredients like hyaluronic acid, salicylic acid and niacinamide can remedy top consumer concerns while delivering beautiful, healthy hair."

Taking cues from consumer trends such scalp care, hair slugging and clean/sustainable care, Vantage developed concept formulations including a Balancing Scalp Scaling Shampoo, 3-in-1 Renewing Serum, Eco Conditioner Powder and Recovery Balm-to-Oil Hair Mask.

[a]www.gcimagazine.com/consumers-markets/news/22879218/us-beauty-sales-will-remain-strong-through-end-of-2023-circana

To better understand the dynamics in the hair wellness category, *Global Cosmetic Industry* has analyzed recent consumer and market data, cross-referenced with emerging ingredient and product launches, to outline key concerns driving the greatest interest among shoppers.

1. Hair Growth

This one's no surprise, but a peek into trending ingredients points to unique opportunities to capture shopper interest.

For instance, Google's new Holiday 100 for 2023, comprising gift ideas "based on trending searches throughout the year," prominently featured Mielle's Rosemary Mint Hair Strengthening Oil. Since its launch, the SKU has been single-handedly responsible for a massive spike in online searches regarding rosemary and hair care; no wonder it soon became the top hair oil in the U.S. market (per the brand).

The popularity of the oil stems from its rosemary-forward branding and ingredient deck. The hero ingredient is frequently associated with "hair growth" queries, making it a darling of the hair growth/revitalization category.

For brands seeking to break into rosemary-based hair care, private label beauty manufacturer Lady Burd has developed a revitalizing Rosemary Mint Shampoo. The sulfate-free formulation comprises rosemary and mint to gently cleanse all hair types.

Elsewhere in the hair growth space, Spate and Exploding Topics have identified growth-related ingredients turning up in more and more consumer searches, as of the fourth quarter of 2023.



For brands seeking to break into rosemary-based hair care, private label beauty manufacturer Lady Burd has developed a revitalizing Rosemary Mint Shampoo. The sulfate-free formulation comprises rosemary and mint to gently cleanse all hair types.

Spate[b] flagged classic African ingredient chebe oil adjacent to hair care in searches, spiking more than 65%, year-over-year. Key related concerns include hair growth, particularly in oil formats. That said, consumers are also heavily searching for information on chebe oil efficacy, requiring brands to explain and backup claims.

Exploding Topics[c], meanwhile, has flagged rising interest in biotin sprays

[b]www.spate.nyc/product

[c]https://explodingtopics.com/

on TikTok. Key related concerns in postings included growth as well as strength and scalp health.

2. Damage Repair

Also on the Google Holiday 100 list was K18's Hair Mask, a bond-building superstar designed to "repair damage from bleach and color, chemical services and heat," according to the brand, leaving the hair soft and smooth, strengthened, and full of bounce.

The success of K18's SKU and the brand in general attracted Unilever, which acquired the brand in late 2023. The timing was notable; just a few weeks earlier, Kline named K18 among the 25 beauty brands[d] most ripe for acquisition.

For those keeping score, other hair sector brands on the Kline list included Coco & Eve (which also offers sun and skin care), Amika, IGK and Verb.

3. Well-aging for the Scalp

Provital's Kerascalp (INCI: propanediol (and) glycerin (and) *Phyllanthus emblica* fruit extract) was created to energize the scalp and, in turn, produce strong and healthy hair. The ingredient is meant to maintain hair anchoring and normal growth. The featured active ingredient, an extract of amla fruit, or Indian gooseberry, is a centuries-old Ayurvedic material known to help promote healthy hair.

Ayurvedic care for the hair are on the rise, per recent Spate data. In particular, the firm has detected a nearly 50% year-over-year spike in searches pairing Ayurvedic oil and hair care, with key concerns including hair growth.

"Kerascalp … is able to prevent follicle miniaturization by increasing expression of collagen XVII (COL17A1) while reducing its proteolysis," explains Nina Esposito, the marketing director of Provital in the United States. "It is also able to ensure melanocyte stem cell maintenance, which is related to premature hair greying."

Esposito adds, "Anti-aging hair and scalp claims are on the rise globally, with the U.S. and U.K. [markets] leading the way in recent launches [per Mintel data]. This falls in line with the overarching trend of skinification as it extends skin care principles to scalp care. Consumers want their well-aging routine to extend beyond their skin, and the scalp is a normal place to start!"



Ayurvedic care for the hair are on the rise, per recent Spate data. In particular, the firm has detected a nearly 50% year-over-year spike in searches pairing Ayurvedic oil and hair care, with key concerns including hair growth; image courtesy of progressman at Adobe Stock.

4. Pro-level Shine

In 2022, Spate[e] reported an uptick in online searches for hair glosses. Related searches included terms such as treatment, at home, what is, clear, salon, for gray, glaze and shine. Searches for "at home" in particular pointed to a desire to achieve effects outside the salon.

Ouai recently leapt into the category with its Hair Gloss ($34), available at *TheOuai.com* and *Sephora.com*.

"Shine isn't just a glow; it's synonymous with vibrant, healthy hair—a feat that's often elusive or held to salon professionals," says Diana Pratasiewicz, director of Ouai's education content. "Unlocking that coveted shine at home is both convenient and impactful, allowing you to flaunt your hair's brilliance effortlessly. As the skinification of hair takes center stage, individuals are shining the light on the outcomes of their dedicated hair care routines, embracing a healthier, radiant approach to hair care."

The gloss provides immediate shine while treating damage, enhancing color vibrancy and protecting against color fading, and defending the hair from heat damage up to 450° Fahrenheit.

The formulation, which works in straight, wavy, curly or coily hair,

[d]bwww.gcimagazine.com/consumers-markets/news/22881528/25-indie-brands-ripe-for-acquisition

[e]www.gcimagazine.com/consumers-markets/news/22275638/spate-us-consumer-trends-in-color-correcting-foundation-overnight-lip-mask-hair-gloss

features key ingredients such as sugar beets, hyaluronic acid, rice water and panthenol.

"The fusion of skin care principles with hair and scalp care is fueling a wave of innovation in products," says Pratasiewicz, "blending luxurious textures and powerhouse ingredients. Think peptides and hyaluronic acid—once skin care staples, now transforming your scalp and strands with similar benefits. Just as skin care routines layer on goodness, hair care is now being seen in the same spotlight, embracing a multi-layered approach to unleash the full potential of your hair."

Gloss and shine claims are also driving new ingredient innovation. For instance, Nippon Fine Chemicals' Lusplan range of plant-derived functional oils provide high shine and gloss, as well as strong adhesion and high moisture retention, in hair care applications.

5. Hormonal Shifts & Resilience for Thicker Hair

Hair loss and thin hair concerns are perennial hair care targets, but recent innovations have specifically targeted hormonal shifts and stress factors. To illustrate, Provital's Densinaria (INCI: water (and) glycerin (and) *Palmaria palmata* extract (and) arginine) is a hair volume and strengthening active ingredient derived from a red algae known as dulce (*Palmaria palmata*), which is paired with arginine to boost hair volume and strength and prevent split ends.



Lady Burd has developed a Scalp Oil for its clients. The vegan formulation comprises rosemary and mint to invigorate and nourish hair follicles.

The technology's reconstructive biomolecules act on the hair cuticle to strengthen the hair, while *Palmaria palmata*'s film-forming effects address split ends. Furthermore, the inclusion of arginine aids in the boosting of hair fiber resistance from the inside out, reportedly increasing fiber diameter by 25%, an impact similar to keratin, per Provital.

The fiber strengthening specifically addresses impacts of stress factors and hormonal shifts, according to the supplier.

"Densinaria strengthens hair fibers by creating hydrogen and saline bonds, improving structural integrity, and increasing tensile strength," says Miguel Moreno, R&D project manager, Provital. "This reduces hair breakage, enhances fiber resilience and restores the overall hair structure. Additionally, proteins, peptides and polysaccharides can coat the cuticle surface, collectively fortifying the hair fibers and preventing the occurrence of split ends in hair."



"Shine isn't just a glow; it's synonymous with vibrant, healthy hair—a feat that's often elusive or held to salon professionals," says Diana Pratasiewicz, director of education content. "Unlocking that coveted shine at home is both convenient and impactful, allowing you to flaunt your hair's brilliance effortlessly. As the skinification of hair takes center stage, individuals are shining the light on the outcomes of their dedicated hair care routines, embracing a healthier, radiant approach to hair care."; image courtesy of Ouai.

Moreno adds, "The impact of stress and hormonal imbalances on hair can result in issues such as disturbances in the hair growth cycle, thinning and changes in texture. In this context, Densinaria can enhance the appearance of thickness by adding volume and strengthen the hair to better define its texture."

Densinaria is of 100% natural origin and is COSMOS-approved.

On the brand side, Act+Acre has launched a Stem Cell collection designed to support hair follicle health to encourage fuller and thicker-looking hair. The collection is designed to address hair loss and thinning associated with hormonal/post-natal issues, aging, stress, scalp conditions, oxidative conditions and more. SKUs include a shampoo, conditioner and the 3% Stem Cell Peptide Treatment, the latter of which features caffeine, which is often associated with hair revitalization.

The SKUs comprise caffeine, hyaluronic acid, and the brand's H2-Grow Complex and H3-Grow+ Complex, featuring plant-based stem cells that reportedly support hair follicle health, with results seen in 12 weeks, per the brand.

As *Global Cosmetic Industry* reported in its September 2023 issue, Spate recently noted 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."

The new Act+Acre collection is now available at Sephora and *actandacre.com;* individual SKUs are sold at Sephora, while a bundle of all three products is exclusively available at the brand's site.

For brands seeking to get into the scalp care space, private label beauty manufacturer Lady Burd has developed a Scalp Oil for its clients. The vegan formulation comprises rosemary and mint to invigorate and nourish hair follicles. The oil is intended to be applied twice a week for dry scalp concerns, as well as protective styles.

Labels are customizable, with a minimum order of 12 pieces.



As with skin care, hair care is increasingly focused on safe, often nature-derived ingredients. This is particularly true in the coloring segment. For instance, Croda's EBC Crodafos MBAL range of bio-based phosphate esters support sustainable claims for permanent and demi-permanent hair color systems; image courtesy of Africa Studio at Adobe Stock.

6. Guilt-free Color

As with skin care, hair care is increasingly focused on safe, often nature-derived ingredients. This is particularly true in the coloring segment. For instance, Croda's EBC Crodafos MBAL range of biobased phosphate esters support sustainable claims for permanent and demi-permanent hair color systems.

According to the company, when an oxidative hair colorant containing Crodafos phosphate esters is mixed with a developer, the dye intermediate complex is structurally protected and can only be broken by shear stress during hair color application.

Therefore, the dye intermediate penetrates the hair cortex with a smaller molecular weight and can begin oxidation coupling for a higher dye uptake and faster hair coloring rate.

The range includes the following ingredients, all estimated to be 100% bio-based: EBC Crodafos CES MBAL for crème textures; EBC Crodafos CS20a MBAL for lotion textures; and EBC Crodafos HCE MBAL, for liquid textures. ■

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Everyone scrutinizes themselves, but not every consumer wants to undergo professional/aesthetic treatments or procedures. New data points to consumers' desire for professionally inspired at-home beauty innovation; image courtesy of Lustre at Adobe Stock.

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LIFT & TUCK: CONSUMER ATTITUDES TOWARD AESTHETIC PROCEDURES

How emerging consumer attitudes point to at-home and topical solutions inspired by professional procedures.



BY DENISE HERICH, The Benchmarking Co.

While it's said that everyone is beautiful in their own way, many U.S. women and men rely on professionals to augment their natural features to enable them to be happier with the skin they're in.

More than 26.2 million surgical and minimally invasive cosmetic and reconstructive procedures were performed in the U.S. last year, according to the American Society of Plastic Surgeons[a].

Liposuction was noted as the most common surgical cosmetic procedure performed in the U.S. in 2022[b], followed by breast augmentation. Of non-surgical procedures, Botox and other neurotoxins topped the list, leading to revenue of $11.8 billion U.S. dollars for all cosmetic procedures that year.

In December 2023, The Benchmarking Company asked more than 4,200 U.S. female beauty consumers which procedures they've had, which they'd like to try, as well as their attitudes toward new cosmetic technologies designed to bring about a professional result through non-invasive, in-home product use.

Her 'Trouble Spots'

When respondents of all ages were asked which parts of their bodies they felt could use some help, aka her "trouble spots," belly fat topped the list; 67% said this was an area where she'd like to see improvement (**T-1**). The desire to lose weight in general was the third most popular trouble-spot at 55%, while components of aging rounded out the top five areas, with facial lines at wrinkles at 66%, the need for teeth whitening (whether age-related or not) at 51% and crow's feet around the eye area at 44%.

Skin issues such as cellulite followed (43%), along with sagging breasts (42%), stretch marks (41%),

[a]www.plasticsurgery.org/news/press-releases/american-society-of-plastic-surgeons-reveals-2022s-most-sought-after-procedures

[b]https://www.statista.com/statistics/281224/leading-surgical-cosmetic-procedures-in-the-united-states/

dull facial skin (41%), age spots/dark spots (40%), large pores (37%), neck crepiness (36%) and sagging facial skin (35%).

Issues surrounding either unwanted hair or hair scarcity were also mentioned, with 41% saying thinning hair was a problem, followed by facial hair removal needs (39%), body hair removal needs (33%), thinning brows (30%) and thinning eyelashes (26%).

While issues surrounding facial acne (23%) and body acne (12%) came out at nearly the bottom of the trouble-spot listing for respondents of all ages combined, for those under 30 years of age, teeth whitening was the number one concern at 68%, followed by belly fat (64%), stretch marks (55%), weight in general (54%) and facial acne (53%).

Less than 1% of respondents of all ages said they had no areas of their bodies they'd like to improve.

T-1. Her trouble spots: all ages combined

	Percent
Belly fat	67%
Facial lines and wrinkles	66%
Weight in general/need to lose weight	55%
Teeth need whitening	51%
Crow's feet/wrinkles around eyes or eyelids	44%
Cellulite	43%
Sagging breasts	42%
Stretchmarks	41%
Dull facial skin	41%
Thinning hair	41%
Age spots/dark spots	40%
Facial hair removal needs	39%
Large pores	37%
Neck wrinkles/crepiness	36%
Sagging facial skin	35%
Body hair removal needs	33%
Thinning brows	30%
Wrinkles or crepey body skin	27%
Thinning eyelashes	26%
Lip lines	25%
Lips too thin	23%
Facial acne	23%
Breasts too small	14%
Nose too large	13%
Breasts too large	12%
Body acne	12%

Procedures She Has Had

Fifty-six percent of respondents of all ages said they've had some type of professional procedure in the past, and 90% said they would be interested in having a procedure conducted by a professional someday.

The most common professional procedure she's had to combat her trouble spots was hair removal by a professional, with 38% saying they have paid to have this procedure, including tweezing, waxing, dermaplaning, etc., at least once (**F-1**).

Pore extractions by a dermatologist or esthetician follow, with 12% saying they've had this professional procedure performed on them, followed by teeth whitening by a dentist (12%), Botox or another neurotoxin injection (11%), laser hair removal (11%), chemical peels (11%), brow laminating or tinting (9%), aesthetic facials (9%), eyelash lift or tinting (8%), or using laser devices or LED face masks in a dermatologist office or medispa (8%).

Seven percent have had fillers such as Juvederm or Restylane, and 6% have had a micro-needling procedure.

Breast augmentation topped our respondents' list for cosmetic surgeries, with 5% saying they have experienced it.

Three percent have undergone weight-related surgeries and procedures, including liposuction (3%), gastric bypass or sleeve surgery (3%), and body contouring procedures such as Coolsculping or Kybella (also 3%).

Extending the Benefits

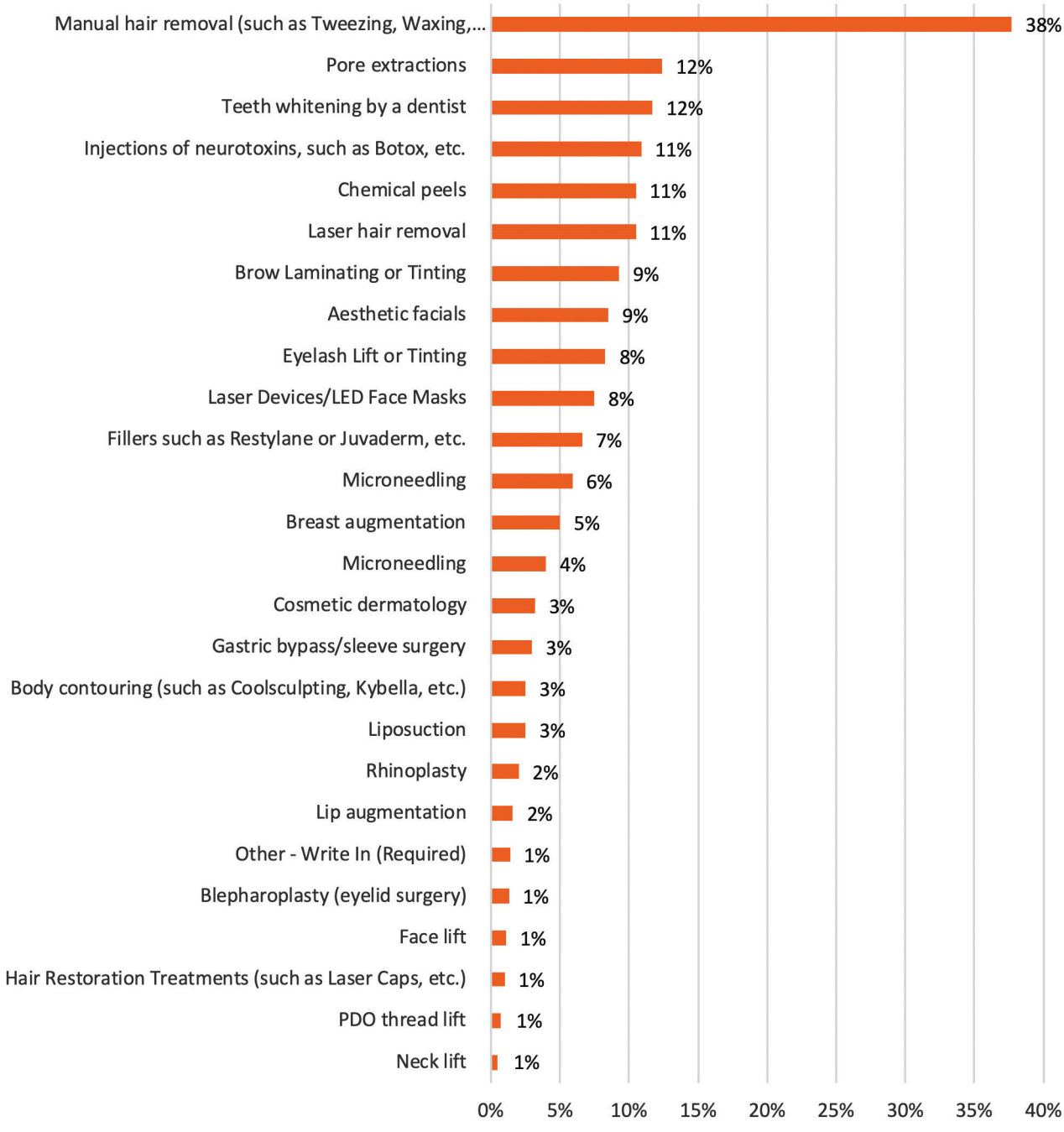
There are many products on the market now to either extend or supplement the benefits of professional treatments. Right now, just 9% of respondents who've had professional treatments use products of this type to supplement or extend the procedure's benefit. Eighty-two percent would be interested in doing so.

There is an opportunity for brands with products of this type to position themselves as partners in her professional procedure journey by maximizing her investment through an extension of benefits.

Brands of products used by respondents to extend or supplement the benefits of professional skin care treatments include Alastin, Bioelements, Dermalogica, Vichy, Obagi, PCA Skin, Skinmedica, Skinceuticals and Zo Skincare, among others.

Teeth whitening strips of various brands were mentioned as follow-ups to a professional whitening service.

F-1 Procedures she has had



Her Pro Treatment Wish List

Interest in having a professional procedure is high, with 90% saying they would be open to having one. Teeth whitening by a dentist (46%) tops her professional procedure wish list (**T-2**), followed by laser hair removal (45%), body contouring such as Kybella or Coolsculping (41%), using laser devices (37%), having a chemical peel (31%), Botox (31%), brow lamination or tinting (30%), eyelash lift/tinting (29%), and fillers such as Juvederm (29%).

What's Important When Considering a Procedure

When considering a professional cosmetic procedure, 96% of all respondents say the reputation of the professional who would perform the procedure is of paramount importance and a major influencer[c], followed by the length of time the benefits will last (95%), possible side effects of the procedure (90%), reviews from other patients who've had the procedure (88%), the availability of before and after photos of patients who've undergone the procedure (86%), the price of the procedure itself (85%), how quickly she can see the results of the procedure (79%), length of downtime following the procedure (74%), the degree of pain involved (70%), and a convenient location to have the procedure (69%).

The amount of short-term pain involved, as a degree of importance when considering undergoing a procedure, ranked relatively low considering the other rankings, at 70%. When asked what degree of pain she would endure for a procedure that could effectively address her trouble-spot issues, a rating of 6.4, on a scale of 1-10 (with 1 being No Pain at All and 10 being A Great Deal of Pain), was the average.

[c]When asked degree of importance in decision to undergo a procedure, with 1 being Not Important and 5 being Very Important.

T-2. Pro procedures she'd like to have

	Percent
Teeth whitening by a dentist	46%
Laser hair removal	45%
Body contouring (such as Coolsculpting, Kybella, etc.)	41%
Laser devices/LED face masks	37%
Chemical peels	31%
Injections of neurotoxins such as Botox, etc.	31%
Brow laminating or tinting	30%
Eyelash lift or tinting	29%
Fillers such as Restylane, Juvederm, etc.	29%
Liposuction	28%
Pore extractions	28%
Microneedling	28%
Manual hair removal (such as tweezing, waxing, dermaplaning, etc.)	28%
Cosmetic dermatology	27%
Breast augmentation	27%
Aesthetic facials	26%
Face lift	21%
Neck lift	21%
Hair restoration treatments (such as laser caps, etc.)	18%
Lip augmentation	18%
Blepharoplasty (eyelid surgery)	13%
Gastric bypass/sleeve surgery	13%
Rhinoplasty	12%
PDO thread lift	9%

T-3. Interest in a non-invasive home procedure

	Percent
Teeth whitening	62%
Manual hair removal (such as tweezing, waxing, dermaplaning, etc.)	56%
Laser hair removal	54%
Laser devices/LED face masks	52%
Products that mimic body contouring (such as Coolsculpting, Kybella, etc.)	52%
Products that mimic neurotoxins such as Botox, etc.	47%
Pore extractions	45%
Products that mimic fillers such as Restylane, Juvederm, etc.	43%
Chemical peels	41%
Aesthetic facials	36%
Brow laminating or tinting	35%
Eyelash lift or tinting	35%
Cosmetic dermatology	31%
Microneedling	31%
Face lift	30%
Neck lift	29%
Hair restoration treatments (such as laser caps, etc.)	27%
Products that mimic benefits of blepharoplasty (eyelid surgery)	26%
Lip augmentation	25%
PDO thread lift	11%

In-Home, Non-Invasive vs. Professional Procedures

There are many new ingredient technologies being developed to mimic cosmetic procedures. Some of these ingredients could mimic the effects of Botox (without injections), oxygen facials (like a professional) or provide an effect like an eye lift (without surgery).

Respondents were asked if, instead of a professional cosmetic procedure, would they be interested in trying a less-invasive solution that they could use at home, themselves, for some trouble-spot issues.

That answer was a resounding yes from 91% of respondents, with 7% saying they weren't sure and just 2% saying no.

Teeth whitening (62%), manual hair removal (56%), and laser hair removal (54%) topped her list of non-invasive, at-home procedures she'd love to experience if the results were on par with a professional procedure, with healthy interest in others, as shown in **T-3**.

While interest is high for these types of potential in-home procedures, 86% of respondents expect them to be less expensive than a professional procedure–even if the outcome was the same and the benefits lasted just as long. ■



There is an opportunity for brands to position themselves as partners in consumers' professional procedure journey by extending benefits; image courtesy of Lightfield Studios at Adobe Stock.



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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The connection between diet and the skin has long been known, but new research points to the connections between skin and gut health for a range of issues, including acne, atopic dermatitis, eczema and psoriasis; image courtesy of C Malambo/peopleimages.com at Adobe Stock.

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GUT HEALTH AS SKIN HEALTH: INGREDIENT TREND TRACKER

Holistic wellness trends and emerging science are intersecting, providing new innovation targets for beauty products and claims.

BY JEB GLEASON-ALLURED, content director, *Global Cosmetic Industry*; and RACHEL GRABENHOFER, managing scientific editor, and PETER SMEDLEY, assistant editor, *Cosmetics & Toiletries*

When Trendalytics[a] unveiled its 2024 ingredient trends to watch, it highlighted many familiar and traditional materials, including whole-body wellness materials such as magnesium, antibacterial mugwort, anti-inflammatory castor oil and magnesium, hydrating sea buckthorn, moisturizing sodium hyaluronate, Ayurvedic turmeric, anti-aging orris root, hair health secret weapon rosemary, and retinol-like rambutan. While the list proves that what's old is new, a wide range of new ingredients and emerging claims provide new innovation opportunities.

Decoding the Gut-beauty Axis

Spate[b] recently placed anti-inflammatory diets on its list of 2024 trends, highlighting that "consumers are looking to dietary avenues to help with beauty concerns." The data backs up increasing interest in deglycyrrhizinated licorice (DGL) supplements derived from licorice root, which supports gastrointestinal health, according to an Exploding Topics analysis of online search data. Other gut health supplements are also trending; for example, searches for L-glutamine supplements have spiked by more than 700% over the 24 months ended December 2023.

The connection between diet and the skin has long been known[c], but new research points to the connections between skin and gut health for a range of issues, including acne, atopic dermatitis, eczema and psoriasis.

Bengaluru, India,-based Hairline International Hair & Skin Research & Treatment Center conducted a two-year observational study from July 2021 to June 2023 and found that, among patients seeking treatment at Hairline International during the study period, "a staggering 72% [with acne vulgaris] displayed indications of poor gut health, marked by symptoms like food intolerance, allergies, GERD and digestive problems," according to Kala Vimal, MD, consultant dermatologist and cosmetologist at Hairline International.

The data squares with a 2021 review of the skin-gut axis published in the journal Microorganisms, which found "observations such as the prevention of AD [atopic dermatitis] through probiotics and the increased prevalence of intestinal comorbidities in chronic skin diseases suggest that skin diseases can be linked to the gastrointestinal system[d]."

Furthermore, emerging research is increasingly connecting the dots between gut health and mental health[e], as well as between mental well-being and healthy skin[f].

Sixty-two percent of the 2,235 participating patients in the Hairline International study were female and 38% male. Each patient underwent an *H. pylori* test to assess their gut health. Of these patients, more than 70% suffered from atopic dermatitis, or eczema.

[a]www.trendalytics.co/
[b]www.spate.nyc/reports

[c]www.cosmeticsandtoiletries.com/research/literature-data/news/21846647/diets-high-in-sugar-and-fat-may-contribute-to-skin-inflammation

[d]www.ncbi.nlm.nih.gov/pmc/articles/PMC7916842/
[e]www.gcimagazine.com/companies/news/22005633/unilever-unilever-x-holobiome-partnership-explores-gut-microbiome
[f]www.gcimagazine.com/consumers-markets/news/22876115/skin-health-is-a-mental-wellness-issue-new-study

Among other things, the researchers found that breastfeeding mothers on supplements reduced the risk of eczema in their children up to the age of two, while patients treated with oral Atogla probiotics and other treatments, including conventional medicines, experienced a 90% reduction in skin inflammation and redness among acne patients, compared to a control group that only received conventional medications and no probiotics. Furthermore, researchers reportedly uncovered an inverse relationship between probiotic use and the occurrence of skin lesions.

These takeaways are far from speculative. No less than Neutrogena recently dove into the skin-gut wellness space with the Clear Complexion Antioxidant Gummies with Zinc. The supplements are designed support a healthy gut and feature vitamins A, C, and E to counteract free radicals and support even skin tone, as well as zinc to support healthy skin function, per the brand. Designed for consumers aged 14 and up, the strawberry-flavored gummies notably feature a daily probiotic—80 mcg *Bacillus coagulans* SNZ1969 10 mg (1 billion CFU)—to support the body's good gut bacteria. A daily dose is considered two gummies, per Neutrogena.



Neutrogena recently dove into the skin-gut wellness space with the Clear Complexion Antioxidant Gummies with Zinc; image courtesy of Neutrogena.



Exploding Topics has detected immense engagement with Botox serums on TikTok, as well as interest in anti-wrinkle ingredient Argireline, which offers a needle-free alternative to more invasive treatments; image courtesy of DragonImages at Adobe Stock.

The launch and the intersecting market data point to an opportunity for brands to educate consumers on gut-skin health interactions and to innovate toward those issues—inside and out.

Argireline's Botox Boom

When Exploding Topics recently detected immense engagement with Botox serums on TikTok, it also noted a key recurring anti-wrinkle ingredient, Argireline. Often associated with The Ordinary's topical Argireline Solution 10% SKU, Argireline is Lipotec/Lubrizol's trademark for the synthetic peptide acetyl hexapeptide-3. Common product formats associated with the ingredient include oils, serums and solutions that target wrinkles on the forehead and around the eyes.

In 2020, Lipotec introduced an updated version of the technology, Argireline Amplified, which was reportedly produced according to the principles of green chemistry and which featured improved efficacy results in attenuating expression wrinkles compared to its precursor.

Then, in 2023, Lubrizol's oil-soluble Argireline YOUth peptide was launched to address the prejuvenation anti-aging concerns of younger consumers by slowing the onset of the signs of aging in a way that mimics botulinum toxin. Argireline YOUth peptide benefits from the LipoClear inverse micelle delivery system, which allows for the creation of an oil soluble active ingredient. As a result, the new peptide can reportedly

be expanded to new applications, including oil-based skin care, especially transparent serums, oils and sticks. This is in line with search patterns surfaced by Exploding Topics' data.

Energizing the Skin

Sederma's new Luceane active ingredient is designed to boost cell respiration and to combat hypoxiaging, thereby reducing skin fatigue and improving radiance.

Inspired by the traditional Chinese medicine Qi concept of the circulation of the skin's vital energy, Luceane mimics the effects of oxygen therapy practices to stimulate and protect skin cell respiration and energy production.

Simultaneously, the active induces micropollutant removal within the cells, invigorates cellular metabolisms and reinforces the skin's holobiont for holistic balance.

In effect, the technology slows the perceived aging process by five years after just one month of application, resulting in a reduction of skin fatigue signs and skin radiance improvement.

Luceane is a bioactive saccharide extract obtained by biofermentation of a *Pseudoalteromonas* strain isolated from a Bahamian candelabra-type octocoral. The material is biodegradable, with full degradation after 28 days.

Collagen Boosters

A New Patent for Copper Peptides

In July 2023, Spate reported that copper peptides were among the skin care ingredients experiencing the largest monthly gains in search volume. Among the products on the market featuring the increasingly popular technology is The Ordinary's "Buffet" + Copper Peptides 1%. No wonder, then, that copper peptides are at the center of The Ordinary's parent company's first patent.

Titled "Skin care formulation with lipophilic peptides," Deciem's patent concerns a skin care composition ideally featuring palmitoyl-GHK-Cu



Inspired buy the traditional Chinese medicine Qi concept of the circulation of the skin's vital energy, Luceane mimics the effects of oxygen therapy practices. to stimulate and protecting skin cell respiration and energy production; image courtesy of Cottonbro at Pexels.



Titled "Skin care formulation with lipophilic peptides," Deciem's recent patent concerns a skin care composition ideally featuring palmitoyl-GHK-Cu (GHK-Cu being a copper peptide) at levels of 0.2-1.1%; image courtesy of Ilse at Adobe Stock.

(GHK-Cu being a copper peptide) at levels of 0.2-1.1%.

GHK-Cu is generally associated with collagen synthesis stimulation, enhanced wound healing/tissue regeneration, anti-aging and anti-inflammatory effects, and more.

In the present patent, the formulation featuring palmitoyl-GHK-Cu would render the composition "substantially free of alcohols or preservatives," ideal for consumers seeking minimalistic and free-from products. (That said, Deciem is historically science-forward, often eschewing the free-from focus of conventional "clean" beauty brands.)

Furthermore, the formulation concept would allow for "a high concentration of the peptide in the final composition," maximizing anti-aging and other related benefits.



By targeting sirtuins to boost skin longevity, brands can tap into age reversal claims; image courtesy of Tatiana Foxy at Adobe Stock..

Plant-based Collagen Fragments

LipoTrue's Col-Frag Remastered is a biomimetic to a fragment of the human type I collagen sequence. The technology is derived from plants grown in vertical farms, thereby boosting its sustainability, and acts as a building block and booster for collagen synthesis. Col-Frag Remastered also tightens the dermis and epidermis, resulting a face lift effect, and brightens the skin while preventing senescence. The ingredient can be used synergistically with ascorbyl glucoside, per the company, and has greater efficacy compared to that conventional material when it comes to minimizing the appearance of wrinkles. Col-Frag Remastered can also be applied in hair care as a natural polymer that delivers moisture, gloss and smoothness to damaged hair upon one application.

AI-driven Peptide Discovery

Ireland-based Nuritas leverages an AI discovery platform to surface valuable peptides. PeptiYouth, an anti-aging cell-signaling peptide for skin care, makeup and body care is designed to improve the appearance of deep wrinkles, dull skin, skin pores, dark spots and uneven skin tone while also boosting the efficacy of vitamin C when formulated together. Among key claims, the collagen-boosting technology reportedly results in a 41% reduction in the appearance of wrinkles, 26% reduction in appearance of fine lines and 20% reduction in dark spots, as well as a 20% visible reduction in pore size and 13% boost in the appearance of smoother skin. These results were reported among a 40 person double blind placebo trial over a 28-day period.

Longevity & the Skin's 'Healthspan'

Estée Lauder's new Skin Longevity platform coincides with the formation of a cross-disciplinary group of longevity experts who will "educate and empower consumers to rethink how they approach skin care and lifestyle" to shift from an anti-aging mindset to an age reversal focus.

The brand's Sirtivity-LP ingredient technology is at the core of the brand's age reversal activities. The technology targets sirtuins in skin, which are a family of seven "NAD+ dependent proteins" central to cellular functions impacting the skin, including "aging, UV damage response, oxidative stress, and wound repair[g]."

Sirtivity-LP is being applied as the hero ingredient in Estée Lauder's new Re-Nutriv Ultimate Diamond Transformative Brilliance Soft Crème, set for launch this month, January 2024, and which reportedly "reveals visible age reversal starting in just 14 days."

Back in 2019, Estée Lauder researchers revealed that increasing evidence has demonstrated the importance of sirtuins in longevity, metabolism and control of stress. As mentioned, they function primarily as NAD-dependent deacetylases, although two of the seven have ribosyl transferase activity. The collapse of local chromatin results in the modulation of transcriptional programs involved in metabolism and inflammation.

However, work presented in 2019 showed it was possible to combine

[g]www.ncbi.nlm.nih.gov/pmc/articles/PMC5568696/

ingredients such as flower and algae extracts with a ferment to activate sirt-1, -3 and -6, respectively (of the total seven). This led to increased activity in 62-year-old skin fibroblasts. Specifically, skin cells could sense and integrate signals given by a eucalyptus extract to combat environmental insults such as increased oxidative stress and inflammation, and decreased barrier function.

Sirtuin- and NAD-focused topical and ingestible products have been a key focus of recent innovation[h], but activity has ramped up significantly in the last year.

Mibelle Biochemistry's new RejuveNAD technology naturally stimulates the endogenous regeneration of NAD+ by activating the enzyme that recycles it, NAMPT, thereby making the skin appear as many as eight years younger.

As detailed in the journal *Nature*, "NAD+ can directly and indirectly influence many key cellular functions, including metabolic pathways, DNA repair, chromatin remodeling, cellular senescence and immune cell function. These cellular processes and functions are critical for maintaining tissue and metabolic homeostasis and for healthy aging."

By boosting the "longevity molecule," NAD+, RejuveNAD is able to optimize cellular processes to simultaneously address "at least" five of the 12 hallmarks of aging, including mitochondrial dysfunction, cellular senescence, loss of proteostasis, epigenetic alteration and genomic instability.

By energizing mitochondria and promoting DNA repair, RejuveNAD is able to make the skin appear eight years younger within 42 days, per clinical studies cited by Mibelle Biochemistry.

Elsewhere, Circe Scientific's Pteroyouth (INCI: resveratrol dimethyl ether (and) picolinic acid) reportedly enhances the activity of sirtuins to regulate cellular activities related to cell vitality and aging.

More innovations in this space are likely to emerge in the new year.

"The Estée Lauder brand has always been at the forefront of breakthrough skin science," said Justin Boxford, global brand president, Estée Lauder. "Longevity is one of the fastest growing movements in the beauty and wellness industries, with multi-generational consumer interest in biohacking and age-reversal practices at an all-time high. Estée Lauder has been pioneering skin longevity research for more than 15 years, and we already have the proven technology to reveal visible age reversal. We see this as a truly pivotal moment for the brand to disrupt the industry, changing what we know about skin aging and reimagining skin care for the future."

Boxford added, "We are thrilled to be collaborating with the Stanford Center on Longevity, a leading authority advancing longevity research. Through the support of their new Program of Aesthetics & Culture, our goal is to build the data-driven foundation from which to shape the future of aesthetics and extend skin healthspan."

[h]www.gcimagazine.com/brands-products/skin-care/news/22093379/invity-debuts-with-nadinfused-face-mask-dietary-supplements



Recently, NielsenIQ reported that 62% of surveyed consumers believe "sustainability is more important to them than it was two years ago"; image courtesy of AnnaStills at Adobe Stock.

What Consumers Mean by 'Clean, Sustainable Beauty'

Terms like "clean" and "sustainable" are immensely amorphous and prone to confusion. It can also welcome unwanted scrutiny. Recently, the U.K's Competition and Markets Authority investigated several claims associated with Unilever products, including claims about ingredients allegedly "presented in a way that may exaggerate how 'natural' the product is." Whether this investigation goes anywhere, it's clear that brand claims are increasingly under the microscope. Aligning brand and consumer ideas around key claims could provide marketers and R&D with breathing room.

Recently, NielsenIQ reported[i] that 62% of surveyed consumers believe "sustainability is more important to them than it was two years ago." Yet

[i]https://nielseniq.com/global/en/insights/analysis/2023/trends-in-sustainable-beauty-2023/

that importance is shifting beyond free-from declarations to more specific claims. For instance, interest in cruelty-free products is up 18.1%, while interest in compostable and plastic-free products is up 30.9% and 12.2%, respectively.

The report warns that, at times, brands will need to find ways to reconcile clean and sustainable demands. For instance, the firm noted, "Many consumers favor natural alternatives to synthetic ingredients, but harvesting natural ingredients at scale could have a negative impact on the environment. As consumers prioritize sustainability, transparent ingredient sourcing and environmental impact assessments will be critical."

Licorice-based Hyperpigmentation Solution

Roelmi HPC has expanded its SelectSieve line with SelectSieve Glitter (INCI: not provided), a botanical complex clinically proven to reduce skin dark spots in terms of size and color intensity, offering a more youthful appearance, per the company.

Composed of *Olea europaea* L. var. *coratina* and licorice root (*Glycyrrhiza glabra* L.), the ingredient is the result of ethical and responsible approaches, per the company.

The clinical study, performed on 60 volunteers aged 25-65 years, confirmed that the ingredient is useful in the treatment of skin hyperpigmentation. Through the inhibitory action of tyrosinase activity, it contributes in reducing melanogenesis and giving support to the response to oxidative stress of the skin.

Biotic Beauty's Next Phase

With dysbiosis a key target for aging and a range of other skin issues, several suppliers and brands are advancing technologies that deliver biomic harmony.



"The integration of Lactobio into our Advanced Research is highly complementary: L'Oréal's strong scientific knowledge and technological advancements coupled with Lactobio's best-in-class formulations using living organisms will significantly strengthen and accelerate our microbiome research dedicated to beauty," said Anne Colonna, global head of advanced research of L'Oréal Groupe. "In joining forces, we aim to develop a new generation of cosmetics that will use cutting-edge innovations in the formulation process to provide science-based, precision probiotic and postbiotic products with new performance levels."; image courtesy of Jacob Lund at Adobe Stock.

Living Beauty

L'Oréal has acquired Lactobio, a Copenhagen-based probiotic and microbiome research company, boosting its beauty ingredient platform with live bacteria technologies.

Lactobio, founded in 2017, is home to a microbiome discovery platform and screening method that aids researchers in identifying the most effective and safe Lactobacillus strains for topical skin and hair applications, per L'Oreal.

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"Denmark has a long history of innovation based on living microorganisms applied to food, agriculture and health, and it was against this background that we were inspired to create Lactobio," said Søren Kjærulff, Ph.D., founder and chief scientific officer of Lactobio. "I am incredibly proud of what our team has achieved and excited for what the future holds as part of L'Oréal Groupe, where together, we can apply microbiome research to new fields of beauty innovation for people all over the world."

Corn-based Postbiotic

BioAktive has announced Lactomaizol, a corn-based multigrain postbiotic active designed for gentle skin cleansing and sebum regulation. The ingredient expands the company's postbiotic actives developed through



An increasing number of hair and skin care ingredient innovation is being derived from the world's oceans; image courtesy of astrosystem by Adobe Stock.

fermentation technology. Features of the ingredient include: natural cleansing, soothing and skin barrier protection, gentle absorption of excess keratin and sebum, significant reduction in the production of excess sebum, and skin smoothing with notable pore shrinkage.

Marine-based Beauty

Red Algae Hair Density Booster

Provital's Densinaria (INCI: water (and) glycerin (and) *Palmaria palmata* extract (and) arginine) is a hair volume and strengthening active ingredient derived from a red algae known as dulce (*Palmaria palmata*) and paired with arginine to boost hair volume and strength and prevent split ends.

The technology's reconstructive biomolecules act on the hair cuticle to strengthen the hair, while *Palmaria palmata*'s film-forming effects address split ends.

Furthermore, the inclusion of arginine aids in the boosting of hair fiber resistance from the inside out, reportedly increasing fiber diameter by 25%, an impact similar to keratin, per Provital.

The fiber strengthening specifically addresses impacts of stress factors and hormonal shifts, according to the supplier.

Densinaria is of 100% natural origin and is COSMOS-approved.

Hydrating Marine Polysaccharide

Sacramento-based Macro Oceans has unveiled a new Hydrating Marine Polysaccharide, derived from Alaska seaweed (*Saccharina latissima*), which reportedly provides clinically proven hydration for skin and hair care products, per third-party trials.

The biotechnology startup produces the cosmetic bioactive compound by using green chemistry to gently isolate the complex, naturally hydrating polysaccharides found in the source seaweed.

The waste product from this process is then used to produce food and plant-based bioplastic packaging, according to Macro Oceans. Furthermore, farmed seaweed is reportedly a regenerative, carbon-negative crop, ensuring a low carbon footprint for the final cosmetic material.

Macro Oceans' investors include Refactor Capital, Lowercarbon Capital and McKinley Capital.

Supporting High-SPF Claims

Croda recently launched several sunscreen ingredients offering high SPF and effective UVA protection. Based on Solaveil Clarus technology, which reportedly delivers a tightly controlled particle size distribution, Solaveil CT-60W (INCI: water (aqua) (and) titanium dioxide (and) stearic acid (and) alumina (and)

polyglyceryl-4 laurate/sebacate (and) polyglyceryl-4 caprylate/caprate (and) sucrose stearate (and) sorbitan trioleate (and) sorbitan caprylate (and) benzyl alcohol (and) isostearyl isostearate) is a titanium dioxide (TiO_2) water-based dispersion that allows for high SPF claims with clarity on the skin. This formulating process removes the undesirable whitening effect typically associated with TiO_2, per Croda, while the SPF efficacy remains uncompromised.

Meanwhile, Croda's Solaveil CT-300 (INCI: caprylic/capric triglyceride (and) titanium dioxide (and) polyhydroxystearic acid (and) aluminum stearate (and) alumina) is a dispersion of hydrophobic titanium dioxide in a naturally derived carrier oil that provides high SPF efficacy with true transparency on the skin.



BASF's Kerasylium is derived from upcycled Silybum marianum seedcake extract (SMSE), is said to contain similar amino acids to keratin. Using an optimized extraction process, the company isolated a micro-complex of nutrients and peptides from this source, which were explored to improve hair condition; image courtesy of Anthony at Adobe Stock.

Retinoid and Bakuchiol Alternative for Sensitive Skin

New test results reportedly show that Lubrizol's Stevisse imparts retinoid- and bakuchiol-like benefits without skin irritation.

In vitro tests showed that the ingredient technology can engender an antioxidant response that is greater than stevia extracts obtained through conventional extraction technologies.

Stevisse is produced using Phenobio, a subcritical water technology. As previously reported, the extraction technology is an alternative to conventional solvents and extracts a broader range of phytoactives by using only water as the extraction solvent.

This is all reportedly completed with a short extraction time with no thermal degradation to provide pure, sustainable and eco-conscious extracts.

Materials produced via the Phenobio system can be certified Ecocert-compliant and meet COSMOS environmental standards.

According to Lubrizol, the latest testing showed that Stevisse can minimize skin inflammation by 57.8% compared to retinoic acid, in a similar way to bakuchiol.

Furthermore, the ingredient reportedly improved the skin tone homogeneity and minimized dark spots after 28 days of treatment.

Lubrizol previously reported anti-wrinkle results for the technology (reduced wrinkle area by up to 87.3% and length by up to 85.3%).

The supplier is using blockchain technology to track Stevisse's production from the cultivation of the raw material (stevia leaves) to the final product delivered to the customer. This reportedly prevents modifications and ensures a fully transparent traceability process from field to bottle.

2024 Beauty Ingredient Preview

The December 2023 annual meeting of the Society of Cosmetic Chemists in New York provided a platform for suppliers to review existing ingredients and preview ingredient technology and research set for launch in the year to come. Here, we round up several materials teased at the event.

Tripeptide for Sebum and Pore Size Control

Lilian Mussi of Chemyunion, Inc. spoke about the synthetic tripeptide-85 (L-glutamyl-L-valyl -L-phenylalanine) and its unique melanocortin receptor-5 (MC5R) mechanism to control sebum at any life stage—as well as manage pore size—with immediate and lasting effects. The impact of the ingredient on lipogenesis gene expression biomarkers revealed: a 15% reduction of PLIN2, which stimulates the differentiation of sebocytes and favors the accumulation of lipids in cells; a 20% reduction of c-MYC, which regulates the size and differentiation of sebocytes; and; a 13% decrease in SCD-1, which stimulates the synthesis of unsaturated fatty acids and the development of sebocytes. Mussi concluded that tripeptide-85 could balance and mattify oily skin, reduce sebum production by 30%

after 14 days, act on young and mature skin, and visibly minimize pore size.

Vegan, Upcycled Hair Repair Protein

Allison Garlet, of BASF France, highlighted a new vegan, keratin-like filler to protect hair. The ingredient, Kerasylium (INCI: maltodextrin (and) *Silybum marianum* seed extract), derived from upcycled *Silybum marianum* seedcake extract (SMSE), is said to contain similar amino acids to keratin. Using an optimized extraction process, the company isolated a micro-complex of nutrients and peptides from this source, which were explored to improve hair condition.

Damaged hair treated with the extract was shown via FTIR to resemble the vibrational signature of untreated virgin hair. According to Garlet, the product penetrated hair, including the cortex and damaged cuticle, stabilizing the hair structure via molecular bonding and imparting breakage protection against, for example, oxidative stress from urban particulate matter; testing showed hair integrity was preserved by 59%. The ingredient also provided a metal protection index of 63%. Finally, a clinical study of 31 women with self-perceived hair damage used an SMSE shampoo and conditioner and reported less splitting, less chemical stress and improved vitality, volume and shine versus the placebo treatment.

Recombinant Type XVII Collagen in Hair Care

Shuxian Hu of Trautec described the production of a 100% pure recombinant collagen having the same sequence as natural human collagen for high bioactivity and tolerability. The ingredient reportedly showed no cytotoxicity, improved cell migration better than human collagen and promoted basal membrane activity, assisting with dermal-epidermal junction repair. A clinical study of a serum containing the ingredient found that after two weeks of microneedle applications, subjects saw reduced hair loss and improved hair density and diameter; microneedle injections of the ingredient after three months provided significant improvements, per Hu.

Hair Conditioning Dynamics

Marni Dexter of Croda then showed how to evaluate the effects of ingredient compositions on the structure, stability and hair protection efficacy of conditioners. She described surface friction evaluations using behentrimonium methosulfate, as well as tests of varying ratios of fatty alcohols to behenamidopropyl dimethylamine (BAPDMA) (e.g., citric acid, lactic acid and gluconic acid), which provided a range of textures, consistencies and stabilities.





Sonneborn, LLC's SonneNatural NXG is a plant-based emollient for use in personal care products. The ingredient reportedly enhances the formulation of lip care and personal care products due to its firmness and sensory properties; image courtesy of Friends Stock at Adobe Stock..

Dexter concluded that formulations with BAPDMA showing lower shear viscosity and low yield stress gave improved conditioning performance with respect to wet combing and surface friction—independent of the ingredients selected. In addition, the approach to achieving lower viscosity was dependent on the conditioning ingredient and the acid used. Whereas BTMS and BTAC required high quat to fatty acid ratios or low concentrations of BTMS, BAPDMA requires an optimized ratio with a high concentration of BAPDMA.

Combating HA Degradation

Ichimaru Pharcos' HyaluGuard (INCI: water (aqua) (and) butylene glycol (and) *Artemisia capillaris* flower extract) anti-aging active reportedly works by inhibiting the HYBID enzyme that degrades hyaluronic acid (HA) in skin. According to the company, protecting HA from breaking down increases the moisture content in skin and reduces wrinkles and skin sagging. The ingredient technology is COSMOS-approved and recommended for facial care, body care, lip care and makeup applications.

Sustainable Functional Advancements

Eco-friendly Solubilizer

Seppic's Sepiclear G7 (INCI: heptyl glucoside) is a multifunctional eco-friendly solubilizer. The ingredient's preservative boosting properties stem from its hydrotrope properties, which increase its preservative solubility in formulations and decreases its water activity, thereby boosting the performance of the preservatives, per the company. Sepiclear G7 is a natural, readily biodegradable, non-ethoxylated and preservative-free low-viscosity liquid, per the company, and is easy to handle and cold processable. These properties render it as an effective solubilizer for fragrances and essential oils with non-foaming properties. The ingredient has makeup removal ability as well and allows formulators to obtain thinner cream-gels without having an impact on the viscosity, per the company.

Plant-based Emollients

Sonneborn, LLC's SonneNatural NXG is a plant-based emollient for use in personal care products. The ingredient reportedly enhances the formulation of lip care and personal care products due to its firmness and sensory properties. The technology's naturally derived firm texture reduces the amount of thickener or wax

required in the end formulation for anhydrous formulas.

The ingredient also offers non-greasy application, excellent moisture retention and an occlusive after feel that leaves skin feeling soft and luxurious, per the company.

Designed to promote sustained moisturization, SonneNatural NXG has been developed for lip balms, lipsticks, body lotions and facial scrubs.

Versatile Emulsifier

BASF's Emulgade Verde 10 MS taps polyglyceryl fatty acid ester technology to provide versatile O/W emulsification that offers sustainability benefits. The technology is readily biodegradable, based on 100% renewable feedstocks and is COSMOS approved. The emulsifier provides good stability in O/W creams and lotions and compatibility with commonly used cosmetic ingredients, per the company, including both synthetic and biopolymers. It also reportedly provides shear thinning behavior and supports easy distribution on the skin.

Versatile Naturally Derived Emulsifier

Seppic's Fluidfeel Easy (INCI: lauryl glucoside (and) myristyl glucoside (and) polyglyceryl-6 laurate) is a naturally derived emulsifier with a soft and light feel. The ingredient supports multiple applications, including skin care, sun care, makeup, hair care, hygiene and fragrance. Originally developed for sprayable fluid to very-fluid textures, Seppic has extended the material's application to thicker formulations to create a wider range of emulsions while retaining its cold process and sensory properties.

Plant-derived Ester

Nippon Fine Chemicals' Plandool PM (INCI: phytosteryl macadamiate) acts as a humectant and conditioning agent in formulations. It is a non-GMO, plant-derived sterol-type ester that, according to the company, ameliorates rough skin and imparts anti-inflammatory properties. Additional benefits include moisturization, high refractive index and gloss with high water-holding capacity, formation of intercellular lamellar structure-like liquid crystals; high spreadability and touch, and reduction of TEWL and improvement of skin barrier function. ■



HOW OXYBIOME SUPERCHARGES THE SKIN

A new solution for youthful, stressed skin.

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Healthy glowing skin has a balanced energy metabolism that is responsible for cells' ability to revitalize and to manage cell turnover. Youthful skin regenerates far faster than adult skin; however, teens' skin experiences external (UV rays/sun exposure, rising pollution and free radicals) and internal disruptions (hormonal shifts leading to sebum production, unhealthy lifestyle choices, etc.) that can lead to dull skin due to low skin power and impact on delayed skin regeneration.

Low O_2 uptake negatively impacts skin regeneration and results in low skin power[a]. Low skin energy may cause an imbalance in the energy metabolism and cause a delay of skin cell turnover, which leads to dull, dry, dark spots/hyperpigmentation, uneven skin tone and rough texture[b]. The Skin



Oxybiome comprises a postbiotic Saccharomyces Ferment Lysate blended with a sophisticated mixture of four amino acids as skin respiration facilitators (Threonine, Valine, Glycine, and Glutamic Acid) which support the natural cellular revitalizing capacity to maintain a glowing complexion; image courtesy of Paragon.

[a]*Schütz, R., Kuratli, K., Richard, N., Stoll, C., & Schwager, J. (2016). Mitochondrial and glycolytic activity of UV-irradiated human keratinocytes and its stimulation by a Saccharomyces cerevisiae autolysate. Journal of Photochemistry and Photobiology B: Biology, 159, 142–148. doi:10.1016/j.jphotobiol.2016.03.*

[b]*Furukawa, F., Kanehara, S., Harano, F., Shinohara, S., Kamimura, J., Kawabata, S., … Miyachi, Y. (2008). Effects of adenosine 5'-monophosphate on epidermal turnover. Archives of Dermatological Research, 300(9), 485–493. doi:10.1007/s00403-008-0882-x*



Oxybiome can only be found in the Bright Stuff series by Emina, a Paragon Technology brand; image courtesy of Paragon.



The Bright Stuff series includes a Micellar Water, Face Wash, Face Toner, Face Serum, Moisturizing Cream, Tone Up Cream and Loose Powder; image courtesy of Paragon.

Supercharged Mechanism has become an interesting new approach pathway for bouncy glowing skin.

Revamping Skin Regeneration

This is where Oxybiome comes in. The ingredient comprises a postbiotic Saccharomyces Ferment Lysate blended with a sophisticated mixture of four amino acids as skin respiration facilitators (Threonine, Valine, Glycine, and Glutamic Acid) which support the natural cellular revitalizing capacity to maintain a glowing complexion.

Saccharomyces Ferment Lysate is a postbiotic yeast obtained by fermentation. It is made from the extraordinary baker's yeast strain VdH2, chosen for its ability to provide high energy, which causes bread to rise.

Oxybiome works deep within the skin's cell powerhouse, reaching as many as 10 layers[c,d]. It works by increasing cell oxygen uptake, which leads to high-energy cells, then harnesses this power to boost skin cell turnover, thereby resolving the dull-skin problem by renewing dead-skin cells, resulting in bouncy-glowing skin.

A consumer panel agreed 100% that using formulations featuring Oxybiome left their skin looking bright, moist and even toned:

- 72% reported glowing skin
- Panelists reported a 153% improvement in smoothness
- Participants also reported a 46% increase in skin moistness
- Finally, panelists reported a 2.4x rise in skin elasticity

Introducing the Supercharged Bright Stuff Range

Oxybiome is opening a new pathway to reach glowing skin that other ingredients have never achieved. Combined with ingredients such as niacinamide and summer plum extract, it produces a supercharged skin power mechanism to achieve 2.7x bouncier glowing skin in just 14 days!

This powerful combination of ingredients can only be found in the Bright Stuff series by Emina, a Paragon Technology brand. The range, designed to supercharge teens' skin, includes a Micellar Water, Face Wash, Face Toner, Face Serum, Moisturizing Cream, Tone Up Cream and Loose Powder.

Emina was launched in 2015 and serves teens and young adults ages 12-25, with a sweet spot of 15-19 years old. The non-acnegenic, non-comedogenic brand is designed to help optimistic teens seeking their authentic self. While the brand features effective, expert-backed technology, it's still fun at its core, declaring itself #StillYourBestie.

Learn more at *www.paragon-innovation.com*.

[c]*Zelickson, A. S. (1960). Histochemical Localization of Mitochondria in Human Skin. From the Division of Dermatology, University of Minnesota Medical School (Francis W. Lynch, M.D., Director) Minneapolis, Minnesota. Journal of Investigative Dermatology, 35(5), 265–268. doi:10.1038/jid.1960.118*

[d]*Ya-Xian, Z., Suetake, T., & Tagami, H. (1999). Number of cell layers of the stratum corneum in normal skin - relationship to the anatomical location on the body, age, sex and physical parameters. Archives of dermatological research, 291(10), 555–559. https://doi.org/10.1007/s004030050453*

WHAT BEAUTY CONSUMERS WANT FROM SUSTAINABILITY: PACKAGING TREND TRACKER

Plus: the latest manufacturer moves in the packaging supply chain.



Beauty has experienced a 64% increase in searches for refillable options, impacting sectors such as color cosmetics, deodorants and skin care; image courtesy of InputUX at Adobe Stock.

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Sustainable packaging for beauty is having an impact. NielsenIQ's "2023 Sustainable Beauty[a]" report finds that compostable and plastic-free products are driving dollar growth, while searches for refillable packaging have spiked.

Notably, the firm reported that "62% of consumers find sustainability more pivotal today than two years ago," with 61% believing sustainability should benefit the planet, while 57% and 54%, respectively, believe it should preserve natural resources and reduce pollution.

Overall, the report notes, beauty has experienced a 64% increase in searches for refillable options, impacting sectors such as color cosmetics, deodorants and skin care.

While consumer interest in sustainable packaging is on the rise, scrutiny of claims are on the rise. In late 2023, the U.K. government's Competition and Markets Authority target Unilever for what it characterized as potentially mischaracterized claims. The authority noted[b], "certain green claims—particularly in relation to recyclability—may be unclear, as they fail to specify whether they relate to all or part of a product, or packaging."

While Unilever has pushed back on the authority's assertions, it's clear that brands will need to keep a close eye on ingredient and packaging claims.

Key Sustainable Packaging Claims

Suppliers and brands are approaching sustainable packaging from a number of angles, from materials to design parameters. Here, we round up a number of recent introductions highlighting the variable approaches.

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

[b]www.gov.uk/government/news/unilevers-green-claims-come-under-cma-microscope



This ICONS|ICS compact format is refillable, allowing for easy replenishment; image courtesy of ICONS|ICS.

Monomaterial Compacts

ICONS|ICS has developed monomaterial cosmetic compacts comprising Eastman Cristal One Renew, an RIC1 resin with 100% certified recycled content, as verified via an ISCC-certified mass balance approach.

The design eliminates the use of metal hinges and pins seen in conventional designs, thereby boosting the compacts' recyclability.

The format is also refillable, allowing for easy replenishment, per the companies.

Refillable Monomaterial Lipstick

Quadpack's Iconic Woodacity 2.0 refillable lipstick format is now available with a new patented closure system, called Solo Snap, and wrapped in a custom monomaterial wooden casing.

It also features Aptar Beauty's Iconic lipstick mechanism, which is POM-free, glue-free and lubricant-free. The mechanism reportedly offers a smooth actuation of the bullet. Used mechanisms can be replaced by pulling them out and snapping in the new one.

The wood casing is available in 100% European-sourced ash or maple wood from sustainably managed forests. PEFC and FSC certifications are available on demand.

The monomaterial wood (ash, maple, etc.) can be customized with a wide array of designs and decoration techniques, per Quadpack.

The Solo Snap system offers a click closure due to an interior structure that functions without inserts or plastic. Quadpack explains, "Consumers simply pull the cap off and push it back on until it clicks."

The updated Iconic Woodacity 2.0 reportedly works well with standard filling lines.

The Aptar Beauty mechanisms are produced in its Chavanod facility in



The Aptar Beauty mechanisms are produced in its Chavanod facility in France, while the monomaterial wood casing is produced at Quadpack Wood in Catalonia, Spain; image courtesy of Aptar.

France, while the monomaterial wood casing is produced at Quadpack Wood in Catalonia, Spain.

Refillable Glass Jars

Baralan has launched its new series of Inner Cups compatible with the company's glass Maria Jars to create a refillable packaging option for skin care.

The Inner Cups offer filling capacities of 30 ml and 50 ml, and can be combined, respectively, with Maria Jar 50 ml and 75 ml.

Inserts can be produced with alternative materials, including PCR content, and in different colors.

Baralan can also work on specific projects to develop ad hoc Inner Cup solutions for other types of jars.

Low-carbon Packaging

SGD Pharma's new pharma-grade Nova lightweight glass bottle packaging features a reduced carbon footprint compared to full-weight counterparts.

The new bottle design adapts the company's narrow neck press and blow capabilities, previously displayed in its Clareo glass vial designs.

As applied to the Nova design, the process allows for bottle weight reduction and optimized glass distribution for enhanced mechanical resistance to withstand transport and distribution stresses.

Meanwhile, the reduced packaging weight minimizes associated greenhouse gas emissions, per SGD Pharma. A new 200 ml Nova bottle's lower raw material consumption reportedly reduces CO_2 emissions by approximately 20% compared with the standard Dorado bottles.

Furthermore, while conventional cosmetic bottles produced by blow and blow processes feature weight-volume ratios of 1.0/3.0, the new 200 ml Nova bottle, with a brimful volume of 215 ml and weight of 140 g, reportedly boasts a weight-volume ratio 0.65 without losing the durability or safety of the Dorado model.

Recyclable Box

Rissmann has debuted its Flip-Lid-Box, which is made of FSC paper and cardboard and omits a magnet, boosting recyclability.

The lid is connected to the base and releases the front panel of the box, revealing the product, also highlighted by the decorated interior setup, including a removable wedge.

The contrasting patterns on the cover are obtained by a laser engraving process. The inner decoration is printed without mineral oil, instead using a water-based varnish.

The Flip-Lid-Box can be produced in both Europe and Asia.

A New Bioresin for Packaging

California- based Verde Bioresins, Inc. is the bioplastics company behind PolyEarthylene, a new biodegradable, industrial compostable, curbside recyclable and PCR-certified bioresin that can be applied to the same manufacturing facilities and processes as conventional plastics, per the firm.

The PolyEarthylene comprises polyolefin products that reportedly contain mix of renewable biobased polymer and natural feedstocks, as well as an undisclosed "biodegradation technology" and manufacturing process.

The bioresin is available in a range of biobased content levels—typically 27-75%—depending on the grade and customer requirements. Various grades are compatible with injection molding, blow molding, film, and extrusion and thermoforming application without any need for retooling.

The PolyEarthylene resins have similar performance properties and characteristics as typical petroleum based polyolefins such as PE and PP,



Baralan's Inner Cups offer filling capacities of 30 ml and 50 ml, and can be combined respectively with Maria Jar 50 ml and 75 ml; image courtesy of Baralan.



While conventional cosmetic bottles produced by blow and blow processes feature weight-volume ratios of 1.0/3.0, the new 200 ml Nova bottle, with a brimful volume of 215 ml and weight of 140 g, reportedly boasts a weight-volume ratio 0.65 without losing the durability or safety of the Dorado model; image courtesy of SGD Pharma.



Rissmann has debuted its Flip-Lid-Box, which is made of FSC paper and cardboard and omits a magnet, boosting recyclability; image courtesy of Rissmann.



California- based Verde Bioresins, Inc. is the bioplastics company behind PolyEarthylene, a new biodegradable, industrial compostable, curbside recyclable and PCR-certified bioresin that can be applied to the same manufacturing facilities and processes as conventional plastics, per the firm; image courtesy of Verde.

according to Verde. As such, in most cases they can be directly substituted.

According to the manufacturer, PolyEarthylene resins are currently being evaluated as a replacement for standard polyolefins in several consumer product applications including caps and closures, blow-molded bottles and tray inserts.

The resins will typically degrade in a landfill environment in less than three years, says Verde. The company uses internal and external third-party testing facilities to validate its product biodegradation rates using ASTM D5511, which measure anaerobic biodegradation rates under landfill conditions.

Fragrance: Sampling & Beyond

Jean-Paul Gaultier has debuted its Divinely Solar range, which includes packaging components from Aptar Beauty. The collection comprises a fragrance, a body lotion, a shower gel, a 1.5 ml trial size and a Scentouch sampler.

The Aptar VP4 SNI15 perfume pump used for the Eau de Parfum Gaultier Divine is available in 30 ml, 50 ml and 100 ml formats. It features a screw neck to allow for refilling.



Aptar's VP4 SNI15 perfume pump, used for the Eau de Parfum Gaultier Divine, is available in 30 ml, 50 ml and 100 ml formats; image courtesy of Aptar/Gaultier.

A gold ring on top of the pump acts a stopper, which needs to be removed to activate the spray.

It is also available in a sample size with the Easy Spray pump.

The Gaultier Divine 200 ml shower gel and body lotion are paired with Aptar Beauty's Satine pump to produce a 500 microliter dose.

A new discovery format, Scentouch, features a patented iD Scent technology in 100% paper samples. Aptar acquired iD Scent in March; the paper used in Scentouch meets a certain number of commitments, including Forest Stewardship Council (FSC) certification, per the manufacturer.



Federal Package has appointed Melissa Niebes as CEO, succeeding Steve Dakolios, who will transition to vice chairman and senior adviser at the company; image courtesy of Federal Package.



Chris Payne has been named CEO of PLPS; image courtesy of PLPS.



Leslie Gurland has been named VP of sales and marketing at PLPS; image courtesy of PLPS.

Meanwhile, Arcade Beauty has acquired Orlandi's TruEssence business, including laboratory and slurry production equipment and the related intellectual property of the organization.

As a result, Orlandi has exited the scented strips category. Following the divestment, Orlandi will refocus on its other sampling technologies and scented retail product lines.

The purchase removes a competitor of Arcade Beauty's ScentStrip offerings, which allow brands to present fragrances in magazines, catalog inserts, direct mail and at retail.

In the meantime, Arcade Beauty is leasing the now former Orlandi facility located at 7026 Discovery Drive, Chattanooga, TN 37416 to consolidate and relocate its existing laboratory and slurry production processes supporting Arcade Beauty's scented strips and label technologies.

Packaging Supplier Expansions & Appointments

A number of suppliers have expanded their operations in North America and elsewhere. Several organizations have also updated key management roles. Here, we round up a number of recent moves.

New Management

Federal Package has appointed Melissa Niebes as CEO, succeeding Steve Dakolios, who has transitioned to vice chairman and senior adviser at the company.

Niebes currently serves as president and chief commercial officer and has been with Federal Package since 2021. She previously served as VP of sales at Reckitt Benckiser and VP of customer marketing at L'Oréal USA.

Of the news, Dakolios said, "Melissa is a trusted and growth-oriented leader with a long history in the consumer goods industry. She has brought fresh energy, vision, and direction to the company and will continue to build upon organizational processes and operational efficiency as the company scales. Now is the right time to bring in new leadership, and Melissa is well-suited to advance our long-term strategy and accelerate growth."

The CEO transition comes as new production lines and manufacturing technology are set to come online in 2024.

Niebes noted, "We've added significant capabilities to support our exciting growth plans in 2024. Key resource additions included expanding our R&D, analytical and microbiology labs, and filling lines, as well as staff across every department in the organization. We will continue to build on our strength as we advance our strategic initiatives."

Elsewhere, Premium Label & Packaging Solutions (PLPS) has appointed Chris Payne as CEO and Leslie Gurland as VP of sales and marketing; both are charged with uniting the company's eight locations to operate synergistically under the unified PLPS brand. (The companies that comprise PLPS are Luminer, Overnight Labels, Label Graphics., HP Mile, Label One and Privateer.)

Payne has three decades of experience, most recently with InterFlex Group flexible packaging, as well as Oracle Packaging, Printpak and Sonoco.

Gurland previously spent five years at Lux Global Label and 17 years at Tadbik (home of Logitech). In her new role, the executive will expand the sales team and shift the

organization's focus from selling as individual companies to selling as a unified PLPS platform. She will also lead the company's brand and marketing efforts and collaborate on product development.

"Over the last few months, I've worked with Leslie and the legacy owners to unify our strengths to benefit our clients and employees," said Payne. "We offer a unique value proposition that is sometimes lacking in the private-equity-owned world of today's label and packaging mega-firms: the personal touch of a small business with the infrastructure of a large organization. This model allows us to offer an extensive portfolio of conventional, specialty, and custom products, outstanding service, and quicker turnarounds."

"Having known or followed the original founders throughout my career, I'm thrilled to join the PLPS team," said Gurland. "Our slogan is 'Changing the Packaging Paradigm,' and we are extremely focused on delivering just that. We are committed to maintaining the passion, creativity, and responsiveness customers want while continuing to grow the company in size and unique offerings."

South Korean Expansion

Berlin Packaging has acquired Nest-Filler PKG Co., Ltd., expanding its reach to South Korea and expanding its reach in Asia-Pacific's beauty and cosmetic packaging market. All employees and locations for this acquisition will be retained.

The 20-year-old Nest-Filler develops packaging for skin care and color cosmetics, including plastic (including PCR) and glass packaging, as well as sustainable solutions such as refillable formats.

"This is a highly strategic acquisition for Berlin Packaging that expands our presence in Asia-Pacific and adds to our growing global beauty and cosmetic capabilities," said Bill Hayes, Berlin Packaging's global CEO and president. "This acquisition also offers our customers even greater access to premium skin care packaging made in South Korea, the industry leader for skin care products."

"We are very pleased to join Berlin Packaging, and we are eager to take an exciting step forward to provide our customers with access to Berlin Packaging's impressive suite of packaging products and services while sharing our innovative packaging solutions," said Steve Shim, Nest-Filler's CEO.

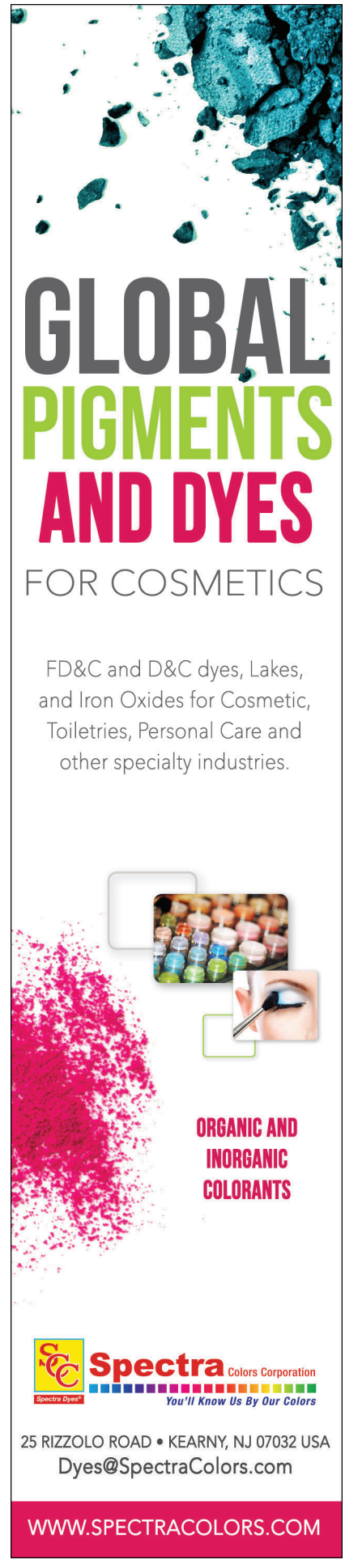
West Coast Office

The Texen Group, which has maintained a New York area presence since 2018, has expanded in the United States with the opening of a West Coast office for Texen Beauty Partners, the Group's trading entity.

Texen Beauty Partners provides stock and custom packaging for makeup, skin care, fragrance applications and the beauty accessory market, all sourced in Asia and North Africa. Its target clientele includes both indie and large-scale brands.

Texen Beauty Partners' management team is based in France, Asia and the United States.

Charlotte Oueini-Gentet, business development manager in Los Angeles for the Texen Beauty Partners' LA office, says, "The United States has always been viewed as innovative and always on the move…it's confirmed! The momentum for new brands and product launches is extremely strong in Los Angeles. Being as close as possible to this market is essential to understand stakes and trends and gain in responsiveness! Our move to the West Coast is a real game changer for our business and we are proud to take up this challenge!" ■





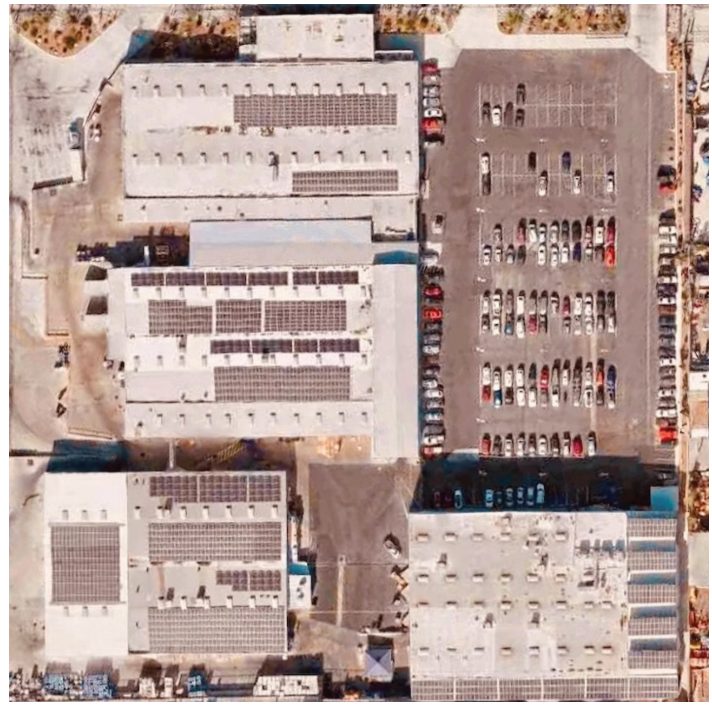
Addressing the growth in the false lash market, Lady Burd has developed its own Lash Glue; image courtesy of Photographee.eu at Adobe Stock.

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BEAUTY MANUFACTURING TREND TRACKER: FEBRUARY 2024

From sustainable production upgrades to trends in packaging, manufacturers open up on the state of the beauty production landscape.

In an era of rapid technological advancements, market growth and fragmentation, supply chain realignments and consolidation, and more, beauty's manufacturing space (turnkey, contract manufacturers, white label producers, etc.) has never been more dynamic. To keep track of emerging innovations, services and capabilities, *Global Cosmetic Industry* has launched an ongoing series of roundups, providing brands with inspiration and information to support future product development or strategic production decision-making.



GAR Labs is solar-powered thanks to more than 2,000 solar panels that provide the multi-building campus with 565,000 watts of clean electricity; image courtesy of GAR Labs.

Keeping Beauty Manufacturing Sustainable

GAR Labs (ISO 9001:2015; certified by DQS Inc.), a hair and skin care manufacturer based in Riverside, California, provides formulating, mixing, filling, packaging and palletizing services for brands producing face and body creams, serums, hair styling products and sprays, self tanners, and more, with minimums beginning at 5,000 pieces.

Notably, the manufacturer is solar-powered thanks to more than 2,000 solar panels that provide the multi-building campus with 565,000 watts of clean electricity. To conserve that energy, all lights inside and out are motion-activated LEDs. These are among the ways the company manages to keep its carbon footprint small.

On the water front, GAR Labs has switched its water purification system from reverse osmosis to a deionization process. Reverse osmosis "filters out all the minerals from half of the water into a 200% concentrate," according to the company. This is a process analogous to sea water desalination. The resulting mineral concentrate is then pumped back to the city sewer system or the ocean.

That process uses two to three times more water than GAR Labs' new deionization system, which "attracts, or 'grabs'" the minerals, while allowing 100% of the water to pass through, according to the company. This reportedly saves the operation 10,000 gallons a day compared to the reverse osmosis system

GAR Labs' sustainable efforts are purportedly being recognized and valued by retailers like Sephora, Ulta Beauty, Trader Joe's and Whole Foods, to which many of its customers now ship.

Meanwhile, GAR Labs is reporting a shift in packaging, with ocean waste plastic and recycled/upcycled materials beginning to surface in

projects. However, these advances can be limited by the typically higher cost of sustainable materials compared to cost-efficient virgin plastic.

Formats are reportedly shifting, too, with pouches on the rise for refills. Tom Raffy, GAR Labs' founder and owner, says that a focus on presentation is needed to make the format feel on par with the original package and thereby get it out of the commodity positioning.

On-trend Formulations

According to Circana, makeup spend per buyer[a] increased by 10% in the first nine months of 2023, while purchase frequency rose by 4%. For these reasons and more, makeup was the fastest-growing sales revenue performer in prestige beauty, driven by skin-forward lip product formats like balms and oils, as well as lip gloss and other lip products.

[a]www.gcimagazine.com/consumers-markets/news/22879218/us-beauty-sales-will-remain-strong-through-end-of-2023-circana



Lady Burd has developed its own Lash Glue, a fast-drying, latex-free formula; image courtesy of Lady Burd.



To tap into the color cosmetic market's growth, private label manufacturer Lady Burd has developed its Lip Stains; image courtesy of Lady Burd.

To tap into the growth, private label manufacturer Lady Burd has developed its Lip Stains. The formulations deliver long-lasting color, gliding on silky-smooth for all day wear and a smudge-proof pout, per the company.

Meanwhile, according to Precision Business Insights[b], the false lash/extension market was valued at $1.4 billion in 2022 and has been forecast to grow at a compound annual growth rate of 7.0% through 2029.

Trends in the space are driving growth, including anime and cat eye lashes, as well as the advent of segmented lashes that allow for more precise shaping compared to conventional full-strip products.

Addressing the growth in the market, Lady Burd has developed its own Lash Glue. The fast-drying, latex-free formula reportedly ensures a seamless application and keeps lashes in place with precision and comfort. The formulation is available in black and clear variants.

Streamlined US-based Manufacturing

Anna Young is a New York-based private label manufacturer offering a range of pre-developed skin care and makeup formulations, as well as fragrance. Focused on assisting brands in speed-to-market, the manufacturer offers a streamlined process that relieves brands of overseeing production on their own.

Anna Young also offers custom solutions, including differentiated bespoke formulations, packaging and branding developed in collaboration with the customer's team.

Viewing itself as a "strategic partner" to its brand clients, Anna Young tracks trends in beauty and ingredients to ensure market relevance, while setting rigorous quality control processes to ensure smooth production and launches.

[b]www.precisionbusinessinsights.com/market-reports/false-lashes-extension-market

Meanwhile, brands can also tap Anna Young's shelf-ready products to get to market faster.

In addition, the manufacturer can help brands infuse their products with sustainable elements in line with their goals.

Manufacturing Acquisitions & Appointments

Albéa's Innovative Beauty Group (IBG) has boosted its U.S. West Coast footprint by acquiring LA-based Roberts Beauty, a specialist in custom-designed packaging and turnkey solutions.

Bret Hadley, Roberts Beauty's CEO, says, "Our team at Roberts Beauty is excited about the opportunities that come with joining forces with IBG. We are confident that brands will gain considerable value from this partnership. IBG brings a dynamic new vision to the beauty space along with a specific approach to customer development. We believe Roberts Beauty will be an excellent growth platform for IBG on the West Coast, and we are delighted to combine our capabilities from U.S., China, Korea and 40-plus years of success with the IBG team."

"With Roberts Beauty, we are strengthening our Los Angeles IBG team while creating an interesting cross-selling platform that uses both our areas of expertise to enhance service for each customer's portfolio," says Xavier Leclerc de Hauteclocque, CEO of IBG. "Roberts Beauty's activity fits in perfectly with the strategy and positioning of IBG by completing our existing offerings: Orchard Custom Beauty for turnkey solutions in Americas, Europe and Asia, and Fasten Packaging for turnkey and packaging solutions in Europe and Americas. In addition, Roberts Beauty brings its own 'boutique innovation lab' where customers can work directly with chemists to develop original formulas tailored to their brand's specifications–a real added-value in terms of efficiency and time management."

Elsewhere, contract manufacturer TaikiUSA has named Siti Khalid as CEO and president.

Khalid, a graduate of Fordham Business School with an MBA in finance and management, joined the company in 2006, holding roles such as account manager and executive director of product development.

She has also been part of the company's executive committee over the last year and has been responsible for day-to-day decisions and operations.

Moving forward, Khalid will be responsible for overseeing all facets of the organization, including growing product innovation and boosting sustainability.

Angela Kazimir, executive director of sales, says, "Siti has a deep understanding of Taiki's sales, products, supply chain and development that will add value to the organization's growth. She is a highly respected member of the beauty industry and a credible voice in working with customers, suppliers, partners and employees."

"I am honored and excited to lead TaikiUSA on our journey of helping brands succeed," says Khalid. "We are now an all-women organization, and we are all very passionate about the beauty industry. We have first-hand knowledge of what consumers want and use this to create strategies to build our business."



"I am honored and excited to lead TaikiUSA on our journey of helping brands succeed," says Siti Khalid. "We are now an all-women organization, and we are all very passionate about the beauty industry. We have first-hand knowledge of what consumers want and use this to create strategies to build our business." Image courtesy of TaikiUSA.

Meanwhile, Florida-based private label beauty and personal care manufacturer Cosmetic Solutions Innovation Labs (CSIL) has named John Puckett as CEO.

Puckett has more than 30 years of industry experience and most recently served as COO of Captech Softgel International and CEO of Barleans.

CSIL has also appointed Matt Unger as president and chief commercial officer. He has more than 30 years of commercial and product development experience in beauty contract manufacturing and at P&G.

In addition, Mark "Hazen" Hauman has been named CFO. He has more than 30 years of industry experience at companies such as Avon and Unilever.

"Cosmetic Solutions provides unparalleled formulation expertise, cutting-edge innovation and top-notch production capabilities," says Puckett. "We are thrilled to harness the full potential of our remarkable facility, our dedicated workforce, and our extensive innovation library, to make a significant impact on the dynamic and rapidly growing skin, hair and personal care markets in North America and beyond. We extend a warm welcome to all clients to visit us in Boca Raton and see what's occurring here."

Warren Becker, executive chairman of CSIL's board of directors, says, "Since my father, Mervyn Becker, founded Cosmetic Solutions Innovation Labs more than 30 years ago, the company has grown to become a leader in outsourced skin care solutions. We are thrilled to welcome John Puckett, Matt Unger, and Mark Hauman to lead the company and continue its tradition of excellence in product formulation and contract manufacturing. CSIL will continue providing exceptional service to its clients, while elevating its innovation and production capabilities across skin, hair and personal care product categories." ■



Bret Hadley, Roberts Beauty's CEO, says, "Our team at Roberts Beauty is excited about the opportunities that come with joining forces with IBG. We are confident that brands will gain considerable value from this partnership." Image courtesy of IBG/Roberts Beauty.

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