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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

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|---|---|
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| **Advertising Production Manager** | Kasia Smialkowski \| 1-630-344-6025/ksmialkowski@allured.com |

AUDIENCE DEVELOPMENT

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| **Customer Service** | 1-847-559-7557/customerservice@gcimagazine.com |

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Address: *Global Cosmetic Industry*, PO Box 3009, Northbrook, IL 60065-3009

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# What 2023 Told Us About Beauty in 2024

The U.S. beauty industry appears on track for growth in 2024, building on strong 2023 momentum.

According to Circana data[a], U.S. prestige beauty industry dollar sales grew by 14%, year over year, to reach $31.7 billion in 2023, while mass market beauty sales experienced a year-over-year dollar increase of 6%.

These results dwarfed other consumer product categories tracked by the firm; beauty truly stands alone.



*Hair styling was the fastest grower in the prestige hair category in 2023, with dollar sales up 24%, driven by a more than doubling of hair launch volume compared to 2022. Image courtesy of Pixel-Shot at Adobe Stock.*

But the firm has warned that economic concerns remain, whether due to inflation, supply chain issues related to the conflicts in the Middle East or other challenges.

To understand where the growth opportunities for 2024 lie, it's important to review what the 2023 data tells us.

1. **Hybrid color is a winning strategy**. In 2023, top growers in the prestige makeup category included lip makeup, which spiked 31% year-over-year, or twice the rate of the overall category. This was led by products such as tinted lip oils and balms, which offer benefits beyond pigment. This skin-friendly positioning meshes neatly with a 2022 Mintel survey cited by Vantage, which showed nearly 70% of U.S. female makeup users want multifunctional products[b].

2. **Body care & Gen Alpha are driving skin care growth**. Not only was the category the fastest-growing segment in prestige beauty based on units sold, per Circana, skin care was also one of only two mass sectors that grew based on unit sales. Top performers included lotions, creams and cleansers for the body, signaling an upswing in the category. Also of note, however, was a rise of teen and tween engagement in skin care, as evidenced by a growing market share among 45-54-year-olds with a household size of four that included children under 18 years old.

3. **Fragrance is all about value**. The key growth sectors in prestige fragrance included high-concentration fragrances, which gained three share points in 2023, as well as mini versions of women's scents, which grew at five times the rate of other sizes. Also on the upswing were mini/travel sizes and body sprays, as well as gift sets.

4. **Don't sleep on styling**. Hair styling was the fastest grower in the prestige hair category in 2023, with dollar sales up 24%, driven by a more than doubling of hair launch volume compared to 2022. The sector is benefiting in part from the broader skinification impacting the hair and scalp category.

As we've learned in recent years, anything can happen. But consumer and market data continues to point to a strong environment for beauty amid an increasingly crowded and competitive field. The winners will be those that are best able to act on what consumers are telling us.

[a]www.circana.com/intelligence/category/blog/?_industry=beauty

[b]www.gcimagazine.com/brands-products/color-cosmetics/article/22877755/color-cosmetics-skinforward-revolution



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

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# INSIDER INSIGHTS:
# SUN CARE INGREDIENTS & TRENDS + PACKAGING FOR BEAUTY LAUNCHES

Ingredients for sun care and packaging for beauty share a common trend of multifunctional formulations and products.



**Featured insiders…**

- BASF
- Derprosa
- DSM-Firmenich
- Hallstar Beauty
- HCP Packaging
- Lumson
- Solésence Beauty Science
- Spectra Colors Corp.

*Sun care ingredients and packaging for beauty share similar trends that are shaping the beauty landscape. Image courtesy of henjon at Adobe Stock.*


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# WHAT'S NEW IN SUN CARE

*Global Cosmetic Industry* recently spoke with beauty insiders to highlight sun care ingredient launches and trends, as well as trends and launches in the color cosmetic and packaging for beauty space.




*Brands are exploring different formats and textures for SPF products.*

## Zinc Oxide Takeover

Kevin Cureton, COO, Solésence Beauty Science, says, "The biggest trend we are seeing in sun care ingredients is that mineral SPF, specifically zinc oxide, has overtaken all chemical SPF actives in new product launches for the second year in a row (2022-2023) in the United States, according to data from Mintel. At Solésence, we see this trend being driven by a greater consumer awareness and interest in ingredients and desire for products that are better for both humans and the environment. According to Mintel, 87% of consumers say they do some kind of research on ingredients. Zinc oxide is the only globally approved, broad-spectrum sunscreen active that is considered both clean in the beauty industry and effective against UVA. Chemical sunscreens, while offering protection, pose risks both to the environment and to human health, potentially contributing to the bleaching of coral reefs and having been cited by the FDA and others as potential endocrine disruptors."

Scott Cardinali, business manager, sun care, Hallstar Beauty, says, "Formulators are increasingly looking to metal oxides, especially zinc oxide, to deliver UV protection amidst the uncertainty associated with various bans and regulatory restrictions on a growing number of organic UV filters. However, consumer interests in "greener" sun care products are driving not only a shift from organic UV filters to inorganic UV filters but also are driving interest in more natural yet efficacious inactive ingredients in sun care formulations."

Cardinali continues, "HallBrite ZDX Clear, an easy-to-use 68% zinc oxide dispersion, meets the needs of formulators who are seeking a broad spectrum inorganic UV filter that can deliver high SPF while minimizing the unwanted whitish cast associated with ZnO filters. The inactive components of HallBrite ZDX Clear are optimized for both high SPF delivery and excellent sensory aesthetics. The high level of transparency also ensures excellent appearance and aesthetics on a broader range of skin tones."

## Multifunctional Formulations

Cureton says, "In addition to the safety of ingredients, the skinification trend of makeup and body products is also driving consumer interest in ingredients; 78% of consumers report being interested in skin protection products with additional skin care benefits. Consumers expect their SPF products to also provide skin care benefits like anti-aging and moisturization claims and include hero ingredients like vitamin C, niacinamide and squalane, among others. Products must also contribute to a consumers' overall sense of wellness by bringing a joyful user experience. Solésence's recent experience supports this trend as new and existing brand partners turn to us to add or expand their offerings of mineral SPF products to address consumer preferences."

Cureton adds, "We are also seeing an increase in consumers wearing daily SPF, in fact 57 % of consumers

report wearing skin care products with SPF year-round. Along with that, we're also seeing an increase in SPF products designed to target a specific region of the face or body and 73% of consumers report being interested in trying specialty skin care with SPF and 37% are willing pay more for it. In response to this, brands are incorporating SPF into color cosmetics, as well as region specific skin care and body products such as eye creams, blushes and lip products. In the past year, we've helped brands launch color lip and cheek products with mineral SPF and we're currently developing eye and scalp products that include SPF claims. We expect this trend to continue in 2024 and beyond as the skinification trend of makeup and body products stays strong."



*BASF's Emulgade Verde 10MS is a naturally derived, non-ethoxylated, O/W emulsifier that works well in sun care formulations. Image courtesy of BASF.*

Hannah Cwienkala, marketing manager—sun and skin care, North America, BASF, says, "As we enter 2024, we continue to see the blurring of lines between sun care and skin care. Consumers are looking for multifunctional benefits that allow them to simplify their routines, using less products that are each jam-packed with benefits. These benefits can come in the form of moisturization, additional skin protection such as skin barrier support and protection from external aggressors. We are also seeing consumers request the benefit of unique, fun, and pleasant sensory. Consumers not only want to be wowed by products' functional benefits, but they are also looking for surprising and enjoyable sensory experiences that will encourage regular use."

Cwienkala adds, "The industry is tackling this trend by focusing on sunscreen aesthetics more than ever before as the margin for error is very small. Long gone are the days of sticky, messy formulas. For BASF, this means targeting our best functional ingredients to support the aesthetics and finding the best combinations of UV filters and cosmetic actives to balance effective sun protection with elegant textures, while adding skin care benefits to create holistic formula examples."

Cwienkala continues, "At BASF we have a broad portfolio of offerings for sun care formulations. In addition to our Z-Cote portfolio of zinc oxide powders and dispersions, we also have many emulsifiers, emollients, and biopolymers that help create effective and aesthetically pleasing sunscreens. In 2023, we launched Emulgade Verde 10MS, a naturally derived, non-ethoxylated, O/W emulsifier that works well in sun care formulations. It performs very well compared to EO-based emulsifiers and enables easy distribution on the skin as well as pleasant sensory, which

## COLOR COSMETICS TRENDS 2024

"One of the major trends for 2024 is based on the Color of the Year, which is Peach Fuzz," says Alexis Capik, president, Spectra Colors Corp. "This color will show up in major makeup brands and products to convey a more natural look. Another trend for 2024 is a more natural but dewy look with minimalist makeup and glossy lips and face."

Pantone's 2024 color of the year, 13-1023 Peach Fuzz, is a gentle color that sits between pink and orange and "whose all-embracing spirit enriches mind, body and soul," per the company.

The "warm and cozy shade" is intended to evoke tactility, caring and community, a sense of sanctuary, subtle sensuality, and collaboration. At the same time, Peach Fuzz delivers the humanity of the mind, body and soul, per Pantone, while delivering "beauty to the digital world." ■

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*"Pantone 13-1023 Peach Fuzz brings belonging, inspires recalibration, and an opportunity for nurturing, conjuring up an air of calm, offering us a space to be, feel, and heal and to flourish from whether spending time with others or taking the time to enjoy a moment by ourselves," says Leatrice Eiseman, executive director, Pantone Color Institute. Image courtesy of Pantone.*

we know is especially important for sunscreens. It can be difficult to find the best balance between effective protection and an enjoyable sensorial experience, which is why BASF expert formulators have tested countless combinations of UV filters, chassis ingredients, and cosmetic actives to find the best balance. Visit our Care Creations website to learn more about 'Better Together' ingredient combinations to create unique and effective sunscreens."

Brian Grady, senior marketing specialist, DSM-Firmenich, says, "Skin care-focused innovation has also taken a notable step toward better emphasizing suitability for melanated skin and all skin tones, aligning with the skinclusive trend. This trend is further highlighted by a significant increase in discussions about the 'white cast' phenomenon on platforms like Instagram, experiencing a 3.6 percentage point YoY rise in 2022."

Grady continues, "DSM-Firmenich is poised to make a significant breakthrough in sun care technology with the impending launch of Parsol Shield (bemotrizinol), the first UV filter to be introduced in the U.S. market in over 20 years. Awaiting GRASE approval, Parsol Shield represents a major advancement in the US UV market. It's not just about bringing a new product to market; it's about redefining sun protection standards. Parasol Shield is the most efficient UVA-UVB filter with broad-spectrum performance, even at low levels. And notably, Parsol Shield boasts an excellent eco-profile, enabling the creation of more sustainable sunscreens and facilitating the development of formulations suitable for different skin types."

Cardinali says, "Consumers are also looking for added skin care type benefits to be delivered from their sun protection products. More and more, daily use skin care and color cosmetic products claim SPF and many new sun care products claim additional benefits such as anti-photoaging and blue light protection. This hybridization of skin care and sun care products is driving interest in ingredients that can deliver multifunctional benefits."

Cardinali continues, "Hallstar Beauty's launch of the SolaPure Glo emollient is well-positioned to address consumer interest in natural ingredients that can enhance sun protection efficacy while also delivering additional benefits to the skin. COSMOS-approved SolaPure Glo is inspired by the wellness benefits of turmeric. It has been proven to offer anti-inflammatory, antioxidant and skin pigmentation benefits. Furthermore, its use in sun protection products can significantly enhance the efficacy of both organic- and inorganic-based UV filter systems. Formulation textures and aesthetics can also benefit from SolaPure Glo, making it an effective and efficient ingredient for naturally positioned sun care products."

## Product Formats

Grady says, "To meet the growing demand for convenient sunscreen and encourage individuals to diversify their sun protection routines, brands have been exploring various formats and textures such as patches, sticks and powders." ■



# WHAT'S NEW: PACKAGING FOR BEAUTY LAUNCHES

## Hybrid Packaging Solutions

Stephanie Rowntree, international product manager, HCP Packaging, says, "We are definitely seeing a big trend for packaging solutions suitable for products that are a hybrid of color and skin care—simultaneously supporting skin health and enhancing the appearance of the complexion. We are also seeing a growing trend for products and therefore packaging that is portable and travel-friendly, particularly for brands targeting the younger Gen Z consumer. We are investing in new tottle designs that offer flexibility in this respect; packaging that is ergonomic, versatile and compatible with a wide array of products such as SPF, foundation, serum and even hair care. Our design team is also very focused on ensuring new packaging designs are accessible and sustainable; incorporating refillable aspects, PCR and recyclability."

HCP Packaging's Twist Tottle 30 ml from HCP's Design Futures Team is an innovative new packaging design for liquid cosmetics and skin care products. With its one-handed dispensing feature, this clever pack allows for easy, accessible and convenient use of products such as sunscreen, foundation and serum, as well as hair care. The Twist Tottle eliminates the need for a separate overcap, reducing overall component parts.

It offers ease of opening, especially when the consumer's hands are wet or a one-handed opening gesture is preferred. Engineered with accessibility in mind for those with motor-dexterity challenges, opening the Twist Tottle is significantly easier than unscrewing a traditional threaded cap. It can be manufactured in various material mixes to ensure the perfect level of flexibility, compatibility and protection for different formula types and viscosities.

The Twist Tottle is also environmentally friendly and is ready-to-recycle within the PP/PE recycling stream. PCR materials are available for reduced environmental impact. There is also the option to include an EVOH layer for enhanced barrier properties.

## Refill Systems

Valentina Dragoni, marketing manager, Lumson, says, "For Lumson, redesigning, rethinking new refill systems is becoming more and more a priority, and attests to our unwavering commitment to sustainability, without overlooking technical, aesthetic and product protection functions. The new Slim rechargeable glass jar in 50 ml format, has recently joined the Lumson's Replace line that already includes Unique, DeLuxe and Japa refillable glass jars. This new solution, designed for prestige skin care products, has a minimal captivating profile and is perfectly aligned with the three key concept of Replace sustainable design: Re-think (the packaging has an eco-design approach), Re-Gen, to give the glass jar a new life and play a part in reducing the $CO_2$ emissions, Re-Act, the consumer plays an increasingly active role and customizes the product by simply replacing the inner cup."




*HCP Packaging's Twist Tottle 30 ml is a new packaging design for liquid cosmetics and skin care products. Image courtesy of HCP Packaging.*

Dragoni continues, "Slim refill jar is eco-friendly also for the materials it is made, the jar can be realized in PCR glass (25%). The plastic inner cup in PP has been specifically designed to allow a protection to be applied on top, and after use, can be easily removed from the jar and disposed of through the recycling chain. A 100% eco-friendly solution especially if combined with the monomaterial cover, made of three fully PP components and specifically designed to be free of any classic material's imperfections. Appearance matters too, the Slim refillable glass jar is totally customizable. The jar can be decorated using several decoration techniques as screen printing and hot stamping, external lacquering and inner one, a special decoration studied to perfectly draw the lines of the glass jar

from the internal, emphasizing its thick bottom. Not only is the jar decorated but also the inner cup in PP can get its own personality with colors, especially if seen separately as a refillable component. Last but not least, to get a 360° product ready to be filled, even the cover can be customized playing with different effects and finishes."

## Tactile Films

Sherry Marvin, director of brand owner/end user business, and Raul Cobus, marketing director in Spain, Derprosa, say, "Packaging for the beauty industry needs to be attractive, distinctive, well constructed and as sustainable as possible. The package must be aligned with the values of the brand. Attractiveness and distinctiveness is connected to the ability of a given product to be chosen among similar or equivalent products of the same category in the mind of the decision maker. And for that, neuromarketing aspects play a very key role: Tactile films help a packaged product to be chosen when it is held, touched [and] sensed by the user. This sensation might be subconscious, but maybe more powerful than the conscious ones. For many brands, their brand promise includes a dedicated action toward safer products and more sustainable packaging. So any option in terms of using raw materials that better support this target would be of choice."




*Lumson's Slim rechargeable glass jar in 50 ml format. Image courtesy of Lumson.*

Marvin and Cobus continue, "Derprosa by Taghleef is continuously launching new products that specifically support the above drivers. In the past month we have launched several films for sustainability as well as improving aesthetics. Derprosa BioBlue is a range of films made from renewable vegetable oil- no petroleum- allowing these films to reduce carbon footprint. Derprosa reLIFE has a range of films that are manufactured with 30% PCR post-consumer chemically recycled raw materials staying consistent with the circular economy. Derprosa has a new film that extends our Pro-Shield line, called Pro-Shield Sensa. The sensa has all the great characteristics of the Pro-Shield films, however, is softer to the touch. This is the most deep matte film in the market, and has the strongest anti scratch properties. Derprosa added to our extensive line of Soft Touch Films-The DL Soft Touch Pro-Shield x4x, which is super matte, super transparent, super tactile, anti-fingerprint and now also scratch resistant. Another new film that Derprosa introduced is the Matte smooth leather and Derprosa Striking Gloss leather films. These films have transparent finishes resembling leather- one glossy the other matte, with high tactile properties." ■

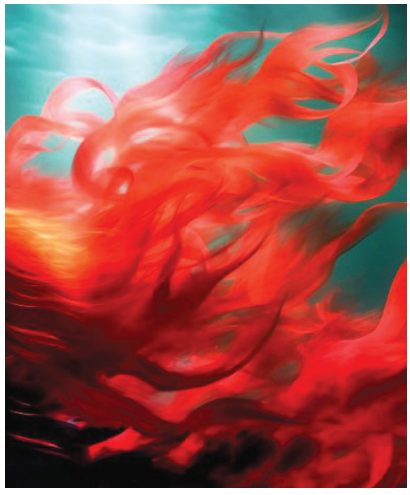


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### FDA Colorants
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*spectracolors.com/fdc-dyes/*

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*www.silab.fr/en/products/skincare/118/inclusium*

Inclusium is a multifunctional natural active ingredient from alfalfa that acts on both the dermis and the epidermis. Evaluated on mixed gender groups with young and mature, Caucasian, Asian, Latin-American and Afro-American panels, it meets universal cosmetic expectations thanks to its hydra-smoothing, complexion perfector and anti-aging powers.

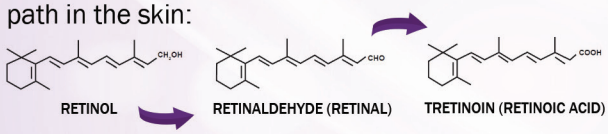

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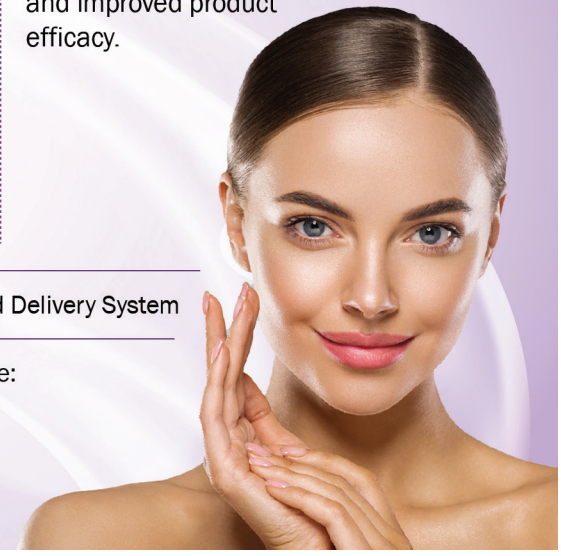
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# THE BEAUTYSPAN: BIOHACKING LONGEVITY (INGREDIENT TREND TRACKER)

**"Today's longevity-boosting ingredients are designed to tackle the root causes of aging at a cellular level."**



*The "beautyspan" refers to the duration of one's skin and hair health/wellness, centering the discussion on holistic, preventive and regenerative strategies, rather than solely aesthetic solutions. Image courtesy of Robert Petrovic at Adobe Stock.*


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

Longevity is beauty's new watchword, highlighting the rise of ingredients and brands that offer age-hacking, regenerative care for consumers of all ages by harnessing key biological levers. The goal? To extend consumers' beautyspan.

The beautyspan is our take on the "healthspan," a concept that measures the length of time a person is healthy. That concept prioritizes not just longevity but also quality of life. Similarly, the beautyspan refers to the duration of one's skin and hair health/wellness, centering the discussion on holistic, preventive and regenerative strategies, rather than solely aesthetic solutions.

These concepts are already well underway in the industry. For instance, in January 2024, Swiss biotech health, aging and longevity company Timeline raised CHF 56 million ($66 million) in series D financing from L'Oréal and Nestlé, among others. The investment interest centered on Timeline's proprietary technology, Mitopure, which reportedly "unlocks a precise dose of the rare urolithin A molecule and promotes healthy aging."

According to a study in *Rejuvenation Research*[a], "urolithin A significantly increased type I collagen expression and reduced matrix metalloproteinase 1 (MMP-1) expression. Urolithin A also reduced intracellular reactive oxygen species, which may be partially due to activation of the Nrf2-mediated antioxidative response."

In applications, Mitopure boosts cellular longevity by recycling and renewing the mitochondria, which is "essential for maintaining cellular energy which supports muscle strength, cognition, immune resilience, skin vitality and other important benefits," per Timeline.

BOLD, L'Oreal's venture capital fund, has also invested in Debut, which recently launched Deinde (Latin for "next, then, thereafter"), a consumer skin care brand that targets inflammaging and boosts skin longevity. Deinde leverages Debut's biotech-derived naringenin, a flavonone that reportedly activates the skin's anti-inflammatory and antioxidative responses.

"We think what's next in skin care will be a shift in the industry to focus on sustaining skin health and promoting the longevity of healthy skin, a different philosophy from anti-aging skin care," noted Dominique Gagnon, VP of consumer brands at Debut.

Estée Lauder has also gotten into the act. Its 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."




*In applications, Mitopure boosts cellular longevity by recycling and renewing the mitochondria, which is "essential for maintaining cellular energy which supports muscle strength, cognition, immune resilience, skin vitality and other important benefits," per Timeline. Image courtesy of Timeline.*

[a]https://pubmed.ncbi.nlm.nih.gov/30215291/

Sirtivity-LP has been applied as the hero ingredient in Estée Lauder's new Re-Nutriv Ultimate Diamond Transformative Brilliance Soft Crème, which reportedly "reveals visible age reversal starting in just 14 days."

Suppliers are also leading the longevity charge. During the 2023 SCC annual meeting in New York, Silab presented a preview of what appears to be a forthcoming ingredient technology designed to reduce senescence-associated secretory phenotype (SASP) secretion. The *Ginkgo biloba*-derived active was reportedly inspired by the longevity of supercentenarians and their potent immune systems, as well as their innate ability to efficiently eliminate senescent cells.

Senescent cells secrete SASP, which can harm healthy surrounding cells. Silab uncovered, ex vivo and in vivo, a significant break starting at the age of 60 when senescent cells begin to accumulate, altering four parameters in skin: elasticity, wrinkles, senescent spots and complexion radiance. Furthermore, while young immune systems easily recognize and eliminate senescent cells from the skin, aging can break down immune cell communication, allowing senescent cells to evade elimination, also known as immunoevasion.



*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. Image courtesy of Mibelle Biochemistry.*




*Deinde's range comprises a Skin-Strengthening Serum ($88), Moisture Locking Face Stick ($36) and Purifying Whipped Cleanser ($32). Image courtesy of Deinde/Debut.*

The new *Gingko biloba*-derived active from Silab was reportedly shown to reduce SASP secretion, thus restoring the communication with immune cells and, in turn, improving the elimination of senescent cells from aged skin. Results showed significant improvements in skin density and elasticity, per Silab, as well as reduced wrinkles, boosted epidermal renewal and enhanced complexion radiance after 28 days of treatment.

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

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.

"Over the past few years, longevity research has made remarkable strides, with its findings significantly impacting fields such as medicine, nutrition and cosmetics," says Fred Zülli, founder of Mibelle Biochemistry. "In the realm of beauty, the term 'longevity' is predominantly associated with ingredients and products designed to decelerate, halt or even reverse the skin's aging process, thereby prolonging its youthful radiance and health."

Zülli adds, "The aging process is governed by nine to 12 universally recognized mechanisms, often referred to as the hallmarks of aging. By counteracting these mechanisms, we can achieve an anti-aging effect. In this regard, 'biohacking' has emerged as a revolutionary trend, aiming to enhance and optimize an individual's body, health and overall life experience."

The executive notes, "A pioneering tool in this field is the determination of the epigenetic clock, which provides an accurate measure of the skin or body's biological age, as opposed to the chronological age indicated in our passports. Innovative active ingredients are being developed to counteract some of these aging hallmarks, thereby reducing the biological age of the skin."

Zülli concludes, "This emphasis on longevity and aging at a cellular level marks a significant departure from previous eras of ingredient

innovation. In [the past], the focus of beauty products was primarily on mitigating external signs of aging, such as wrinkles and age spots. However, today's longevity-boosting ingredients are designed to tackle the root causes of aging at a cellular level."

## March 2024 Ingredient Trend Tracker

In addition to ongoing longevity innovation, a wide range of ingredient technologies and themes have come to the fore in recent months.

### 2024's Top-trending Ingredient?

According to a Beauty Pie report[b], ectoin, the multifunctional amino acid derivative, has experienced a 163% increase in Google searches over the six months ending November 2023. The ingredient is associated with strengthening the skin barrier, a claim that boomed in the last year.

### Beauty Bio-factories for Sustainable Innovation

Endophytes are plant microbiota—symbiotic microorganisms that live inside plants and which act as bio-factories for natural bioactive compounds that offer beauty benefits, including microbiome balance, anti-inflammatory and pro-aging effects, anti-pollution defense, and much more.

Provital's new Triplobiome platform for the discovery and biotechnological production of plant endophytes as a source for cosmetic actives leverages these materials for sustainable innovation.

Notably, the platform can generate unique natural actives that don't put undue stress on botanical sources.

The process reportedly identifies target plants, isolates endophytes (which can synthesize bioactive phytochemicals) from these plants, identifies key strains among these endophytes and thereby generates new beauty actives.

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



*During the 2023 SCC annual meeting in New York, Mathilde Frechet, Ph.D., of Clariant discussed the development and application of a light-biomimetic technology designed to stimulate "feel-good hormones and cognitive relaxation" in the service of lack of sunlight and dull skin. Image courtesy of jes2uphoto at Adobe Stock.*

### The Mind-beauty Interface

The concept behind neurocosmetics harnesses materials that mimic the body's endogenous neuromediators by binding to skin cell receptors to regulate skin functions and, ultimately, address issues such as blemishes. At the same time, these materials' ability to bind to receptors may allow them to induce a sense of well-being, as well as other sensations, delivering a holistic wellness value proposition. To date, technologies have focused on calming, mood-boosting and even sleep-supporting concepts.

During the 2023 SCC annual meeting in New York, Mathilde Frechet, Ph.D., of Clariant discussed the development and application of a light-biomimetic technology designed to stimulate "feel-good hormones and cognitive relaxation" in the service of lack of sunlight and dull skin.

According to Frechet, sunlight deprivation from indoor living, seasonal variation, etc., has dramatic negative effects, including depression and a decrease in vitamin D levels, serotonin (the feel-good hormone) and melatonin (to support sleep).

In its research, Clariant measured the relaxation effects on the mental state of individuals in response to a light simulator. The team observed benefits after one exposure 24 hours later. The group then attempted to replicate this effect in a neuroactive derived from the *Sanguisorba officinalis* (butterfly) plant via the company's sustainable plant milking technology.

Per Frechet, thanks to the plant's tormentic acid content, the neurocosmetic enhanced cognitive relaxation and skin complexion by amplifying the vitamin D pathway and hormonal production through skin opsin activation.

One neuro technology already on the market is Mibelle Biochemistry's TiMood, which is based on the Himalayan timut pepper and reportedly improves neuronal function in the skin in the service of enhanced skin homogeneity. It also is said to positively influence users' moods and emotional well-being.

"Neuroactive ingredients in beauty products, sometimes referred to under the umbrella term 'neurocosmetics,' are a relatively new development in

the cosmetics industry," says Mibelle's Zülli. "These ingredients work by interacting with the nervous system, particularly the nerve cells in the skin, to achieve their effects. The potential benefits of neuroactive ingredients could include: skin health such anti-inflammation and soothing; anti-aging such as cell regeneration and activation of growth factors; and sensory experience such as heat, cold and pressure sensation."

He adds, "But the true magic of neurocosmetics lies in the potential for mood and stress regulation. In this research the so-called skin-brain axis is addressed. First, studies show that the topical application of cosmetic actives on the skin can influence some mood parameters of the volunteers, leading to a sense of well-being. This ground-breaking research has given birth to a new category of products we're calling 'Emotional Beauty,' creating a virtuous cycle of look good-feel good-look good."

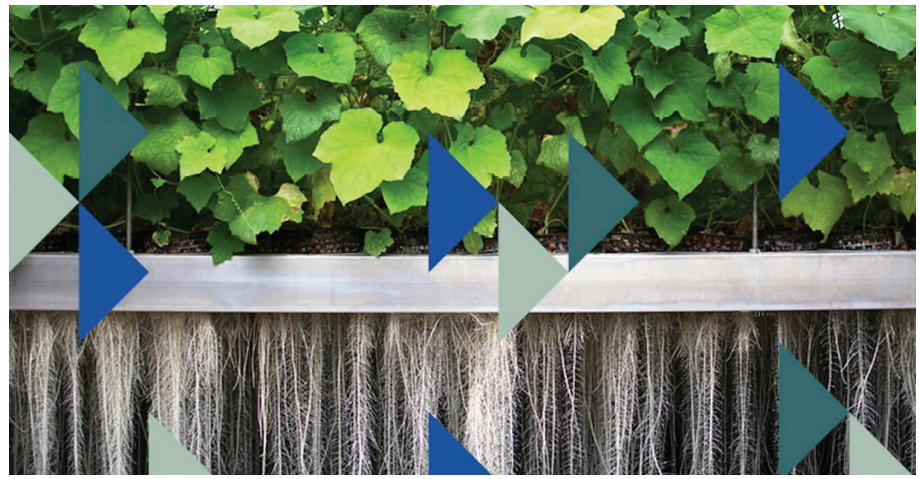
## The Beauty of Plant Milking

WGSN placed plant milking[c] among its top trends for 2024. "This alternative cultivation method uses aeroponic cultivation and the extraction of active ingredients from the plant's roots," the firm noted, thereby "maximizing yields and minimizing land and water use." Plants subjected to this method can be harvested numerous times per year without destroying the botanicals.

One key player in plant milking, Plant Advanced Technologies, has already established ingredient partnerships in beauty. In 2018, it facilitated the development of the anti-inflammatory active Equibiome from Seppic. Two years later, it partnered with Clariant on the anti-ager Prenylium and Rootness Energize, which targets several mechanisms responsible for under-eye circles and eye bags.

## Menopausal Beauty

With an aging Gen X cohort transitioning into its menopausal phase, a number of brands and suppliers are addressing key concerns that come with this disruptive force.



*Clariant is one of the early adopters of plant milking technology, which led to the development of its Prenylium ingredient. Image courtesy of Clariant.*

In September 2023, for instance, Pierre Fabre Laboratories took a minority stake in French skin care and supplement brand MiYé, which focuses on women's hormonal balance and well-being from puberty to menopause.

A few months before that announcement, Vichy Laboratoires partnered with Embr Labs to enhance the quality of life for menopausal women by providing the tools needed to establish a holistic, personalized approach to their care. Vichy's Neovadiol line is specifically formulated for peri- and post-menopausal skin.

Meanwhile, Embr Labs developed Embr Wave, a wearable device designed to allow women to access immediate relief from hot flashes. Combined, this activity points to a highly dynamic and growing market.

On the ingredient front, Roelmi HPC has announced ExceptionHYAL Blossom (INCI: sodium hyaluronate), which reportedly meets the HA physiologic need for vaginal mucosa-increasing glycosaminoglycans, aquaporins and protein synthesis, thus promoting hydration. It induces an amelioration of symptoms such as vaginal dryness, itching, pain and urinary urgency typical for women in menopause, per the supplier, thus improving the quality of life.

"Menopause, a natural biological transition, is accompanied by various skin alterations due to hormonal shifts," says Zülli. "These changes can manifest as dryness, diminished elasticity, thinning and heightened sensitivity. Beauty brands catering to this demographic often prioritize ingredients that can assuage these symptoms and bolster skin health during and post-menopause.
One such group of ingredients is plant estrogens, also known as phytoestrogens. These naturally occurring compounds, found in a variety of plants such as soy, have the ability to mimic the effects of estrogen in the body. They can assist in balancing hormone levels in the skin and body, potentially alleviating menopause-related symptoms. Isoflavones, like genistein, predominantly bind to the estrogen receptor beta and inhibit matrix metalloproteinases, which are responsible for collagen degradation."

He adds, "As we age, the levels of sex hormones, including estrogens and androgens, decline in both women (a phase known as menopause) and men (referred to as andropause). Interestingly, both estrogens and androgens share the same precursor molecule, dehydroepiandrosterone

[c]www.wgsn.com/en/top-trends-2024

(DHEA). Recent research has revealed that our skin possesses all the necessary enzymes for sex hormone synthesis, either from circulating DHEA or even through the local conversion of cholesterol into DHEA. Studies have demonstrated that an extract from the monk's pepper can stimulate the formation of DHEA in cells, thereby offering an alternative approach to combat skin aging during menopause or andropause."

Mibelle Biochemistry's Densorphin natural active ingredient is based on a concentrated extract of monk's pepper berries. The technology is said to stimulate the activities of β-endorphin and DHEA to increase the density and elasticity of skin while reducing the appearance of wrinkles.



*During the 2023 SCC annual meeting in New York, Sederma's Alba Cico, Ph.D., previewed a new peptide to improve C. acnes-induced skin damage. Image courtesy of Jacob Lund at Adobe Stock.*

## Surgery-free Acne Therapies

During the 2023 SCC annual meeting in New York, Sederma's Alba Cico, Ph.D., previewed a new peptide to improve *C. acnes*-induced skin damage. According to Cico's presentation, peptide PP4 displayed in vitro that, without acting on *Staphylococcus epidermidis*, it was able to delay *C. acnes* cell growth, quorum and adhesion, and modulate its biofilm formation by 98%.

Per the presenter, these features are involved in formation of inflammatory lesions. The peptide also demonstrated efficacy against inflammatory markers and promoted several extracellular matrix proteins to reduce pockmarks. Skin surface improvements were measured after the use of a peptide-containing cream for two months, offering an alternative treatment to surgery.

Elsewhere, Azeco's Azepur99 (INCI: azelaic acid) is a multifunctional ingredient that can help regulate melanin production by inhibiting the activity of tyrosinase—which can help lighten dark spots, age spots and post-inflammatory hyperpigmentation. It is also reportedly effective in treating acne and preventing future breakouts by reducing inflammation, killing acne-causing bacteria, decreasing sebum production and preventing the formation of new comedones. Furthermore, the technology is said to help fade acne scars.

Finally, Contipro's Zinnerine offers a zinc hexapeptide complex that delivers retinol-like activity. It fights four key events leading to acne formation, per the supplier: *Cutibacterium acnes* overgrowth, inflammation, increased sebum production and hyperkeratinization. It also offers soothing effects, supports skin barrier function and reduces wrinkles, per the company.



*With an aging Gen X cohort transitioning into its menopausal phase, a number of brands and suppliers are addressing key concerns that come with this disruptive force. Image courtesy of Cultured at Adobe Stock.*

## Upcycled Beauty

***Upcycled rapid skin soother:*** The Upcycled Beauty Company (UBC) has relaunched its Barley Toniq (INCI: *Hordeum vulgare* extract (and) propanediol) ingredient technology in conjunction with its North American market partner, Malté. UBC works with a brewery less than 80 km from its U.K.

manufacturing site to upcycle spent barley grain (itself locally sourced) left over from the brewing process. This material would otherwise go to waste.

UBC has a Canadian partner that manufactures Barley Toniq to the U.K. operation's specification, using locally sourced spent grain from a brewery in Quebec. As a result, UBC can provide sustainably upcycled material in both Europe and North America.

Barley Toniq is rich in proteins, peptides, polypeptides, amino acids and carbohydrates, delivering soothing and rebalancing effects to irritated skin, even at levels as low as 1-3%. Per the supplier, the ingredient features upcycled and microbiome-friendly propanediol, which contributes to the soothing effects.

According to UBC, the material can soothe redness by as much as 23% in two hours; one application is reportedly sufficient to halt further irritation. Applications include skin care and body care, particularly for sensitive and reactive skin.



*UBC works with a brewery less than 80 km from its U.K. manufacturing site to upcycle spent barley grain (itself locally sourced) left over from the brewing process. This material would otherwise go to waste. Image courtesy of LIGHTFIELD STUDIOS at Adobe Stock.*

***Upcycled pollution defense:*** Biolie's Biolime (INCI: aqua (and) propanediol (and) *Citrus aurantifolia* (lime) fruit extract) is a natural and COSMOS-certified organic aqueous extract from upcycled limes, produced with a reportedly zero-waste enzymatic extraction technology. The extract is said to protect skin cells when exposed to pollution, per the company, in part by boosting ATP production and preserving DNA.

***Upcycled emulsifier alternative:*** CP Kelco's Kelcosens Citrus Fiber is upcycled from citrus peels and certified by the Upcycled Food Association. The ingredient is intended for use in facial creams, serums and body lotions in which it offers stabilization of emulsions and a light texture. The cold processable material is an alternative to synthetic and natural emulsifiers, reportedly allowing for emulsifier-free formulas.



*Delaying dermochronology? A new alternative to animal-derived collagen? Suppliers have new solutions to tackle key issues in beauty. Image courtesy of puhhha at Adobe Stock.*

## 2 New Approaches to Collagen

During the December 2023 annual meeting of the SCC, Anne Yun Mu of Evonik Corp. discussed the development of a human-inspired recombinant collagen that reportedly offers a sustainable alternative to animal collagen.

"Collagen is the key to skin's structural integrity," explained Mu, who noted it is lost at a rate of 1% per year with aging. "[We combined a] deeper understanding of molecular biology and fermentation expertise to create revolutionary vegan collagen."

The human collagen III-inspired recombinant 50 kDa protein is produced in yeast and is reportedly 100% identical to the N-terminus of the human type III collagen.

The company's work addressed technological challenges for the industrialization of such recombinant protein as well as working mechanisms in terms of the extracellular matrix and dermal-epidermal junction structural stability and boosting.

At the same meeting, Silvia Pastor, Ph.D., of Lipotrue highlighted a plant-based human TIMP2 (TIMP metallopeptidase inhibitor 2) that can be applied to delay dermochronology caused by photoaging. Per Pastor, photoaged skin, with a scar-like dermis, is characterized by high MMP content that degrades the extracellular matrix and alters collagen density and organization. TIMP2 can counteract this degradation; in fact, Pastor noted, low levels of TIMP2 are found in keloid scars.

Using an MRNA technology to synthetically express human recombinant proteins or fragments of wild (unmodified and nonGMP) plants—essentially turning them into biofactories—Lipotrue was able to generate the desired protein and "get the proper post-translational modifications." The resulting TIMP2 reduced UV-induced MMP production by 63% in a test gel, and it successfully rebuilt collagen in dermal solar scars. Additional improvements were observed in terms of wrinkles and skin roughness.

## A New Pathway to Skin Hydration

During the most recent SCC annual meeting, Christophe Toumit of Greentech discussed the application of fermented *Gentiana lutea* (yellow gentian) extract to reverse the slowing down of skin holobiont functions related to skin dehydration. Through metaproteomics, the company reportedly identified an apparent role that the skin holobiont plays in moisturization maintenance. The extract has reportedly been shown to restore this function and been clinically proven to protect surface lipids, leaving the skin rehydrated, thereby opening a new path to innovative targets in skin hydration.

## Well-aging Tools

***A Botox and retinoid alternative:*** Sirona's GlycoProteMim is an anti-aging compound designed as an alternative to retinoid-based treatments, per the company. GlycoProteMim heightens cellular responses to reactive oxygen species (ROS), according to the manufacturer, and boosts antioxidant SOD2, or superoxide dismutase 2. Designed for all skin types, GlycoProteMim also reportedly enhances hyaluronic acid synthesis and fibroblast proliferation to fortify the collagen 1 network.

In applications, the ingredient technology reportedly improves skin laxity and quality to boost UV protection and enhance the skin barrier. The result is a reduction in the visibility of wrinkles, diminished inflammation and greater skin radiance.

***Ginseng brightening and wrinkle reduction:*** Summit Cosmetics Europe's Bio-GoldGinseng (GBG-natural; INCI: *Lactobacillus/panax* ginseng root ferment filtrate) is rich in saponins (ginsenoside Rh2) and offers anti-aging properties, brightening of complexion and is reportedly nine times more active than classic ginseng. In applications, the technology taps melanin biosynthesis to brighten the skin; it also reduces the appearance of wrinkles.

## Sustainable Functionality

A wide number of functional ingredients—from emollients to thickeners and beyond—have been launched, allowing for winning sensory experiences and enhanced sustainability.

First up, Applechem's Sorbithix L-100 (INCI: sorbeth-230 tetraoleate (and) decyl glucoside (and) sorbitan laurate) is a non-ionic associative thickener for personal cleansing formulations that works well with surfactants like glutamate and isethionate, as well as older generations of surfactant systems. Per the supplier, the technology "is the only thickener on the market that can boost and sustain viscosity in formulations containing high amounts



of fragrance [3-5% usage rate] while still maintaining foaming properties."

Sorbithix L-100 can functionally boost viscosity in glutamate surfactant systems without excessive usage rates, the supplier says, or adversely affecting sensory, rheological behavior, etc. Suitable for pH ranges of 4.5-7.5, the technology is non-irritating, gentle, mild and non-irritating, and easy to use.

Elsewhere, Evonik's Ecohance Soft Baobab (INCI: *Adansonia digitata* seed oil) is sourced from the Sahel region of Ghana. The natural botanical emollient offers skin caring, moisturizing and nourishing properties. It can be used in a wide range of natural cosmetic formulations, such as hand creams, hair conditioners and body butters.

Meanwhile, Cosphatec GmbH's Cosphaderm E NGM natural is a liquid lysolecithin derived from soybeans that offers emulsifying and dispersing properties in aqueous environments and a high water-binding capacity. The ingredient also contributes to improved hair combability in conditioners and to a light and silky skin feel in leave-on formulations.

The supplier's Cosphaderm PA-12, on the other hand, is an active organic acid derived from the soaking water of corn bran. Its chelating properties provide an antioxidant function by preventing the formation of reactive oxygen species while reducing the discoloration of cosmetic products.

Also on the emulsifier front is IOI Oleochemical's Imwitor 372 P (INCI: glyceryl stearate citrate), a natural anionic O/W emulsifier that comes in flakes for easy processing. The material is compatible with multiple textures (lotion, cream and butter) or applications (baby, skin or hair care). In formulations, the ingredient provides uniform spreading and a smooth and soft after-feel.

In the delivery system space, Green Line Ingredients' Imbue Shea (INCI: water (and) *Butyrospermum parkii* (shea) oil (and) glycerin (and) polyglyceryl-6 stearate (and) glyceryl caprylate (and) *Carthamus tinctorius* (safflower) seed oil (and) xanthan gum (and) *Rosmarinus officinalis* (rosemary) leaf extract) is a microemulsion that performs as a delivery system. It can be used in a variety of products where intense moisture is the desired result. It is reportedly ideal for sprayable milks, wet wipe solutions, light lotions, rich creams and conditioning hair products, and is well suited for hair products that target coarse, dry and damaged hair.



*Applechem's SorbiThix L-100 enhances thickening across all traditional surfactant systems and integrates with modern surfactants like glutamate and isethionate. Image courtesy of Rido at Adobe Stock.*

The company's Imbue TEC (INCI: water (and) triethyl citrate (and) glycerin (and) polyglyceryl-6 stearate (and) glyceryl caprylate (and) *Carthamus tinctorius* (safflower) seed oil (and) xanthan gum (and) *Rosmarinus officinalis* (rosemary) leaf extract) is a microemulsion that performs as a delivery system in a variety of products where deodorization is the desired result. It is therefore ideal for foot creams, deodorizing washes and pet products, per the supplier.

In the multifunctional space, Lipoid Kosmetik AG's usNeo (INCI: propanediol (and) *Usnea barbata* (lichen) extract (and) tromethamine (and) tetrasodium glutamate diacetate (and) water (aqua) (and) sodium hydroxide) multifunctional microbial control technology reportedly prevents the overpopulation of certain bacteria that lead to unwanted skin conditions such as body odor, blemishes or dandruff, without resorting to antimicrobials that can throw off the larger microbiome balance.

Another microbiome-friendly technology, BioAktive's Lactomaizol (INCI: *Zea mays* (corn) kernel extract (and) *Lactobacillus* ferment lysate filtrate (and) *Lactobacillus*/rice ferment (and) glycerin (and) modified corn starch (and) betaine (and) xanthan gum (and) 1,2-hexanediol (and) phenethyl alcohol (and) propanediol), is a corn multigrain postbiotic active designed for gentle skin cleansing and sebum regulation.

Created using fermentation technology, the ingredient offers the following benefits: soothing cleansing and skin barrier protection; gentle absorption of excess keratin and sebum; significant reduction in the production of excess sebum; skin smoothing with notable shrinkage of the appearance of pores. ■

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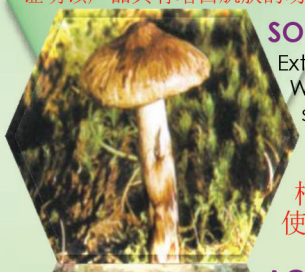
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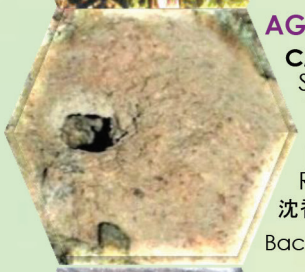
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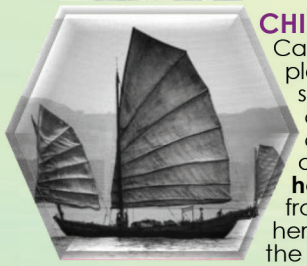
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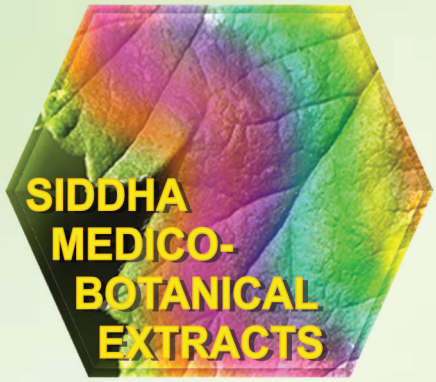
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独创的植物防腐剂(水溶性)适用于化妆品配方

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忍冬（金银花）萃取液
**TSCA Listed | FEMA GRAS Listed | DHHS Listed**
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Green 绿 Red Deep 深红 Ultra Sky Blue 天蓝
White Pearlescent 珍珠白 Red Light 浅红
Dark Ultra Brilliant Yellow 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**
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# CAN MACHINES TEACH BEAUTY ROUTINES?
## (TECH TRACKER REPORT)

**From improving hair care product discovery to optimizing skin care routines, emerging platforms are solving consumers' challenges in the digital age.**

In its 2024 trend overview, Mintel noted[a] that "technology will play a vital role [in beauty] with artificial intelligence (AI), virtual reality (VR), and augmented reality (AR) applications personalizing beauty experiences, tracking well-being metrics and offering virtual wellness consultations."

This insight merges well with the firm's Beaut-AI trend, which explains that, "Artificial intelligence will transform the beauty industry by making it more personalized, efficient and effective, but governance and transparency will be critical to growth."

AI and AR are already being applied to consumer-facing experiences to improve the shopper's journey in selecting ideal products, particularly in efficacy-centric categories like skin and hair care.

### AR Skin Care Coach

For instance, Shiseido's new Beauty AR Navigation platform allows consumers to perfect beauty regimens via their smartphones or tablets.

The application was developed using *Kansei* emotional engineering that leverages "aesthetics, sensory psychology and design" to create emotionally resonant experiences that appeal to the senses, per Shiseido.

The system uses AI-driven motion recognition technology to capture detailed hand movements and provides skin care steps via the Beauty AR Navigation interface, which features videos and narration.

The content provides a quantitative evaluation that will reportedly show users if their skin care routines are appropriate for their needs. The goal is to coach users toward an optimal beauty routine that maximizes the benefits of skin care products.

The system provides visuals on optimal hand movements (direction, speed, etc.) using virtual hands superimposed on the user's own image. Voiceover narration, meanwhile, provides real-time explanations of the movements.

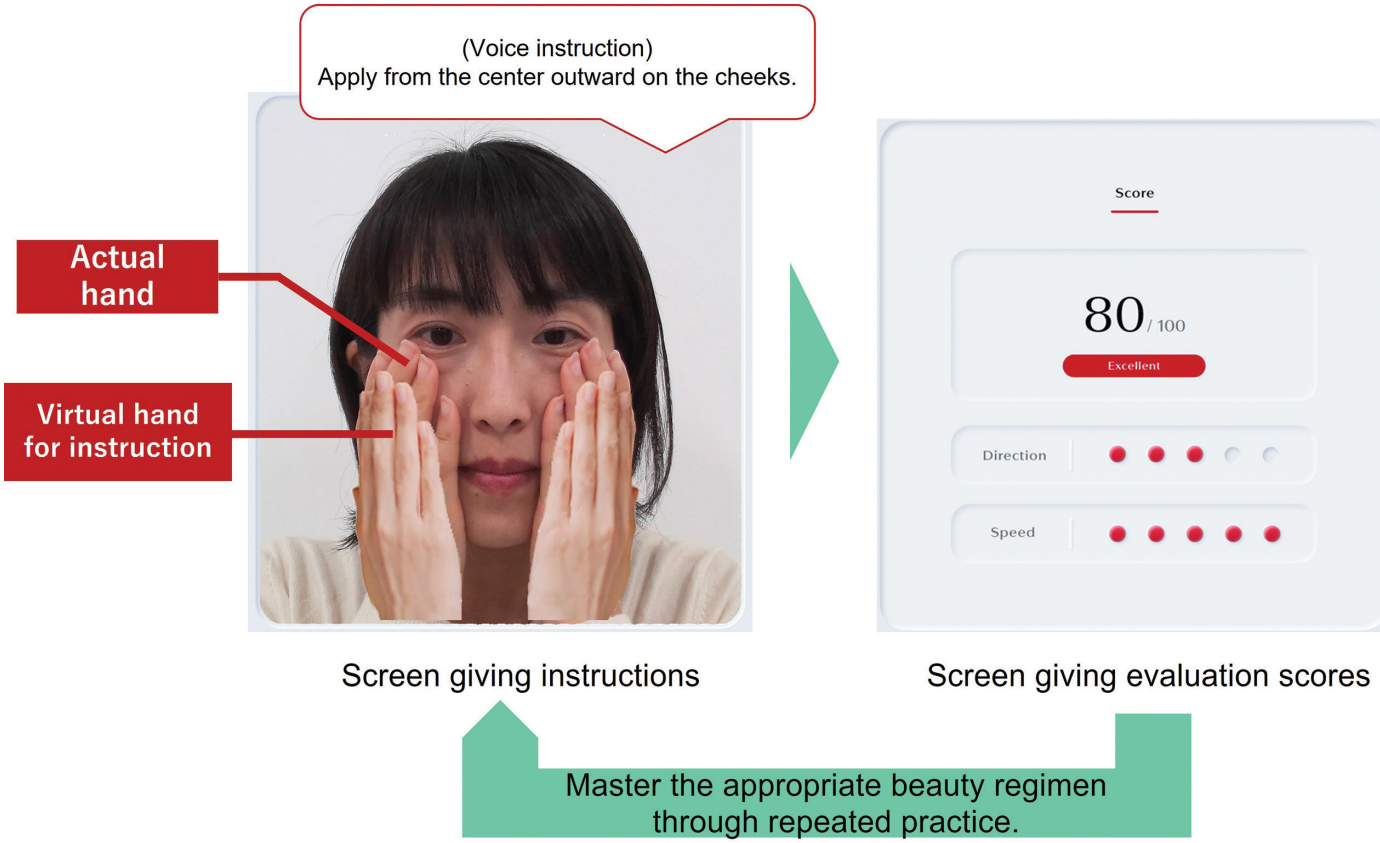
The user can then repeat the hand movements on their own and receive an evaluation from the system.




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*New AR technology from Shiseido is designed to teach consumers how to best apply skin care. Image courtesy of Anastasiia at Adobe Stock.*




*Shiseido's new Beauty AR Navigation platform allows consumers to perfect beauty regimens via their smartphones or tablets. Image courtesy of Shiseido.*

The AR platform is intended to fill the gap left by an increasingly contactless consumer experience that has transitioned from traditional in-store and in-person communication to a digital-based milieu.

While contactless experiences can be convenient, they can also create an education gap, leaving consumers to wonder "whether they were using the cosmetics correctly, or if they were failing to get the full benefits due to inadequate application," Shiseido explained.

According to the company, "When users apply lotion and emulsion following the 'Effective Skincare Application Method' developed by Shiseido, the feeling of the moisture, firmness, and elasticity of the skin is enhanced and the psychological state of the users improve such that they experience a positive uplifting feeling, compared to the time when they follow their own self-care routine."

Shiseido argues that an optimal routine can boost skin moisture levels within a month.

## Inclusive AI Hair Analysis

Just as the Shiseido system resolves a challenge for skin care consumers, Ulta Beauty's new Virtual Hair Analysis tool integrates Myavana's HairAI technology to help shoppers understand their hair type and receive personalized product recommendations.

The analysis tool has been folded into the retailer's e-commerce virtual try-on experiences to improve the hair product search journey.

Myavana's core technology first went beta in 2012 and analyzes the variables of hair strands and hair products to produce personalized hair care regimens.

As of June 2023, Myavana's scientific intelligence hair analysis system (SI) had sharpened its analyses based on 2 billion strands of hair.

Meanwhile, Myavana, founded by Candace Mitchell Harris, has received strategic investments from Prisma Ventures (Ulta's emerging tech fund) and the BrainTrust Fund (the group behind investments in companies such as Thirteen Lune).

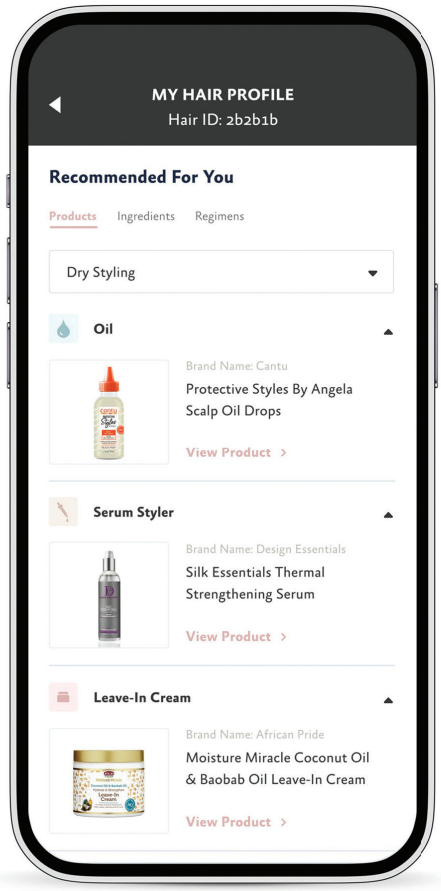
The funds will reportedly go toward Myavana's enterprise retail expansion, including salon channels and global product distribution.

"Myavana is emerging as a leader in beauty AI because its hair strand analysis super-serves every customer in this valuable marketplace, from the shopper seeking a personalized

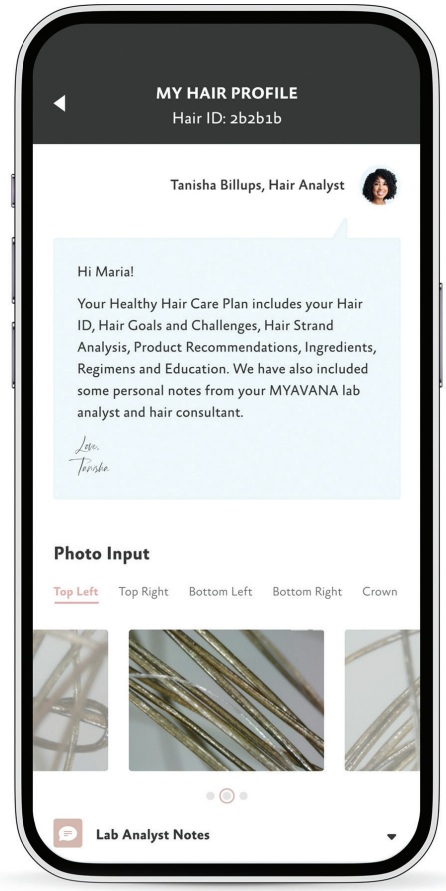
diagnosis, to retailers and stylists wanting to sell the right products to shoppers the first time," said BrainTrust Fund general partners Kendra Bracken-Ferguson and Lisa Stone. "We're looking forward to working with Candace and her team as the brand continues to accelerate."

"Through Prisma Ventures, Ulta Beauty's digital innovation fund, we're always looking to support and invest in technologies that will pave the path forward for the world of beauty–especially those with like-minded values aiming to innovate the space through an inclusive lens," said Agustina Sartori, senior director of digital innovation at Ulta Beauty and managing director of Prisma Ventures. "Candace's visionary approach to digitizing beauty experiences for all hair types, including textured hair, is incredibly unique, and we're thrilled to collaborate with Myavana on their mission to open new doors for more guests through hair analysis technology."

"In the beginning at Myavana, we set out on a mission to transform the hair industry through science and technology and I am ecstatic to partner with Ulta Beauty to begin this digital transformation in retail," said Harris. "Through our personalized hair care technology that will innovate and elevate our shopping experiences, we're excited to bring to market better identification and understanding of our unique hair strands and unique hair journeys while partnering with the nation's largest beauty retailer that prioritizes innovation and inclusion." ■




*Myavana's core technology first went beta in 2012 and analyzes the variables of hair strands and hair products to produce personalized hair care regimens. Image courtesy of Myavana.*




*As of June 2023, Myavana's scientific intelligence hair analysis system (SI) had sharpened its analyses based on 2 billion strands of hair. Image courtesy of Myavana.*




# BEAUTY GROWTH TO CONTINUE THROUGH 2026

**The rise of India, emerging shopper trends and the rise of masstige are reshaping the industry.**



*Looking ahead, Circana is forecasting 10% growth for the U.S. prestige beauty market, with expansion slowing in 2025 and 2026 to 8% and 7%, respectively. Image courtesy of rh2010 at Adobe Stock*

While the U.S. consumer's willingness to spend in most consumer product sectors remains low, beauty is a notable exception.

According to Circana data presented as part of CEW's "State of the Industry: Global Trend Report 2024[a]," U.S. prestige beauty industry dollar sales grew by 14%, year over year, to reach $31.7 billion in 2023; mass market beauty sales experienced a year-over-year dollar increase of 6% in the same period.

Meanwhile, masstige beauty accounted for 11% of overall sales, representing a growth rate of 16%, about twice that of mass.

On the upper end of the spectrum, luxury beauty's dollar share of the U.S. market totaled 14% in 2023, per Circana, while unit share totaled 5%.

The U.S. luxury beauty sector is now pegged at $4.4 billion, with a projected growth rate of 9%, which is notably softer than the 14% rate of the prestige sector.

[a]https://cew.org/event/state-of-the-beauty-industry-report-2024/


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Meanwhile, Black-founded beauty brands grew 13% in dollar terms.

Combined, the U.S. beauty sector grew 11% year-over-year, totaling $108 billion.

Looking ahead, Circana is forecasting 10% growth for the U.S. prestige beauty market, with expansion slowing in 2025 and 2026 to 8% and 7%, respectively.

Overall unit performance is expected to remain steady through 2026, with some consumers shifting their spending to mass, per Circana.

From a global perspective, NIQ's Tara James Taylor noted to the CEW audience that Europe's beauty market posted 10.9% growth in 2023, compared to 21.3% for Latin America and 3.4% for Asia-Pacific, reflecting continued softness in China.

The relative weakness of the Chinese beauty market has driven interest toward India as a new international growth center, as evidenced by Sephora's November 2023 retail expansion partnership with Reliance Beauty & Personal Care.




*The relative weakness of the Chinese beauty market has driven interest toward India as a new international growth center, as evidenced by Sephora's November 2023 retail expansion partnership with Reliance Beauty & Personal Care. Image courtesy of Sephora*

According to NIQ data, India's beauty sales were up 7.1% year over year in latest reporting period (Q3 2023).

In that time, fragrance sales jumped 17.6% year-over-year. This is echoed by a rise in online searches for men's fragrances, per data presented by Google's Sam Mintz and Spate's Yarden Horwitz.

Skin care sales in India—another key men's segment per Google and Spate—jumped 8.6% in the same period, per NIQ data, followed by color cosmetics, which increased by 8%.



*According to NIQ data, India's beauty sales were up 7.1% year over year in latest reporting period (Q3 2023). Image courtesy of Kitreel at Adobe Stock*

Hair care sales in India were up 5% in the same time frame, while nail care sales increased about 4.9%.

Key trends in India, per NIQ, include Ayurvedic ingredients native to the market, as well as minimalism and male beauty.

Google/Spate data presented during the CEW event unearthed other trends, including natural formulations, interest in which is driven by a young population in India, as are searches focused on pollution and UV defense.

Elsewhere, top U.S. trends included scalp health and celebrity brands, per NIQ, while leading U.K. trends included menopausal beauty, skinification concepts and K-beauty.

According to NIQ, top trends among Chinese beauty shoppers include local brands, natural health ingredients and high-tech beauty.

In total, per NIQ data, global beauty spending was up 13% in 2023, compared to about 11% in the U.S. market.

Unit sales grew 2.7% in the European Union, compared to 4% in the U.S. market. ■



*Key skin care concerns found among "moderate" users of color cosmetics include acne, dry patches and dark circles, according to the Mintel report. Image courtesy of Emil Lime/peopleimages.com at Adobe Stock.*


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# 4 WAYS TO ACCELERATE MAKEUP'S 2024 MOMENTUM

**The makeup sector is coming off a strong year; hybrid, high-performance and multifunctional products may be the answer for maintaining the growth curve.**

Makeup posted the fastest growing dollar sales[a] in the U.S. prestige beauty category in 2023, according to Circana. Makeup was also one of only two mass sectors that grew based on unit sales (the other was skin care). Understanding the growth drivers behind last year's results points to top prospects for 2024 and beyond.

## 1. Hybrids for Casual Users

A recent Mintel analysis[b] identified continued heightened interest in skin care-makeup hybrids, which are particularly compelling to more casual users of color cosmetics and thus could serve as solid gateway products for the sector.

This is borne out by sales data. According to Circana, top growers in the prestige makeup category in 2023 included lip makeup, which spiked 31% year-over-year, or twice the rate of the overall category. This was led by products such as tinted lip oils and balms.

This aligns with Euromonitor data[c] spanning the first nine months of 2023, which noted that "other lip products"—excluding lip liners and lip pencils—posted the greatest online sales growth of any beauty or personal care category tracked by the firm.

In fact, those "other lip product" sales increased more than 2x compared to the comparable period of 2022. Similar to the Circana findings, top performers included lip serums, tinted lip oils and "other products designed to enhance their lip features."

In response to growth in the skin-friendly lip category, private label manufacturer Lady Burd has added a nourishing lip oil to its client offerings. The hydrating formulation offers a natural, glossy finish and is EU vegan-compliant.

Beyond the lips, key skin care concerns found among "moderate" users of color cosmetics include acne, dry patches and dark circles, according to the Mintel report. These offer promising targets for product innovation.

[a]www.circana.com/intelligence/category/blog/?_industry=beauty

[b]www.mintel.com/beauty-and-personal-care-market-news/how-colour-cosmetics-brands-can-appeal-to-different-types-of-makeup-users/

[c]www.euromonitor.com/article/tracking-the-winners-in-beauty-and-personal-care-e-commerce-over-the-first-nine-months-of-2023

# EMERGING MAKEUP INGREDIENTS & TRENDS

## 2024 Color of the Year

Pantone's 2024 color of the year, 13-1023 Peach Fuzz, is a gentle color that sits between pink and orange and "whose all-embracing spirit enriches mind, body and soul," per the company.

The "warm and cozy shade" is intended to evoke tactility, caring and community, a sense of sanctuary, subtle sensuality, and collaboration. At the same time, Peach Fuzz delivers the humanity of the mind, body and soul, per Pantone, while delivering "beauty to the digital world."

For color cosmetics evoking Pantone 13-1023 Peach Fuzz, Spectra Colors Corp. recommends leveraging organic pigments, particularly FD&C Yellow 6 Allum Lake. For personal care, the company recommends water-soluble FD&C Yellow 6 or oil-soluble D&C Red 17, depending on the application.



*For color cosmetics evoking Pantone 13-1023 Peach Fuzz, Spectra Colors Corp. recommends leveraging organic pigments like FD&C Yellow 6 Allum Lake. Image courtesy of maxa0109 at Adobe Stock.*

## Iron Oxides for Mineral Cosmetics

Spectra Colors Corp. offers iron oxides for mineral makeup (foundations, eye shadow, powder mineral pigments, blush, etc.) that are safe for use with sensitive skin types.

The company's range includes yellow iron oxide, AKA ferric oxide hydrate; red iron oxide (famous for its namesake red color); black iron oxide, AKA ferric ferrous oxide; and iron oxide light brown.




*Spectra Colors Corp.'s range includes yellow iron oxide, AKA ferric oxide hydrate; red iron oxide (famous for its namesake red color); black iron oxide, AKA ferric ferrous oxide; and iron oxide light brown. Image courtesy of Spectra Colors.*




*Spectra Colors Corp. offers iron oxides for mineral makeup (foundations, eye shadow, powder mineral pigments, blush, etc.) that are safe for use with sensitive skin types. Image courtesy of Spectra Colors.*

## Light Scattering for Blurring & Blue Light Defense

During the SCC annual meeting in December 2023, Rupa Darji, Ph.D., of BASF France introduced a novel bio-inspired photonic material with highly tunable characteristics. According to Darji, the effects of structural color depend on light scattering of ordered or disordered features within microstructures. This inspired BASF scientists to mimic these patterns to control light for cosmetic applications.

Porous silica microspheres with ordered photonic features were produced by BASF to create soft-focus effects while maintaining natural-looking transparency. Haze and transmittance properties were measured and compared with solid non-porous silica particles in an oil-based formulation. The researchers concluded that the material achieved a blurring effect.

In addition, modeling tools, including experimental learning loops, were developed to predict properties of the photonic microspheres and used to design additional microspheres for skin protection against blue light. The materials will be launched commercially in 2024.

## Conscious Colors

Sun Chemicals' SunPuro Natural Carotene O N70-2317 is a globally approved natural colorant derived from *Dunaliella salina* algae. The material reportedly delivers vivid color from yellow to orange, as well as antioxidant properties, which can be used in color cosmetics and skin care products.

Meanwhile, the company's SunPuro Natural Carotene BTO N70-2527 is a globally approved deep orange-red colorant made through the bio-fermentation of beta carotene. The process generates an enhanced yield while minimizing the product's environmental impact, per the company. ■



*Lady Burd has added a nourishing lip oil to its client offerings. The hydrating formulation offers a natural, glossy finish and is EU vegan-compliant. Image courtesy of Lady Burd.*




*Vantage Personal Care has developed Effortless Color, a range of skin-friendly color innovations. Image courtesy of Vantage Personal Care.*

In October 2023, Spate[d] picked up on the prevalence of makeup-skin hybrids in face products. At the time, bronzing drops were averaging more than 370% year-over-year search growth online, dominated by Drunk Elephant, which has had immense success with its D-Bronzi Anti-Pollution Sunshine Drops. The drops include 5% niacinamide, antioxidants and omega fatty acids.

Illuminating glow serums are another top facial makeup product, based on search volume. Consumers are searching for terms such as niacinamide, review and booster alongside "illuminating glow serum." The prevalence of niacinamide in search traffic may be related to its inclusion in Keys Soulcare's Let Me Glow Illuminating Priming Serum with Niacinamide. This, Spate points out, is all the more reason for product names to feature key ingredients.

In response to the demand for hybrid products, Vantage Personal Care has developed Effortless Color, a range of skin-friendly color innovations that includes the liquid All-Over Glow Blush, featuring collagen-boosting probiotics for "a radiant flush to eyes and cheeks," according to the company. The creamy, blendable, two-in-one concept features Sunjin Chemicals' Sunsil-Oleo130 for a pleasant skin feel and stabilized, non-separating formula. The blush also includes Vantage's Maxigloss Plus elastomer gel for enhanced viscosity, a cushiony effect

[d]www.spate.nyc/

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*In January 2024 Spate noted significant growth in non-toxic product formats, including mascara, brow gel and makeup remover. Image courtesy of Seventyfour at Adobe Stock.*

and even lay of pigment on the skin, as well as Vantage's Silkflo, a booster of emolliency and moisturization.

The Effortless Color Collection also features concepts such as the Hydrating Satin Lipstick, Tinted Zinc Shield lightweight tinted moisturizer with SPF-30 and the Hydrating Tinted Face Oil.

## 2. High-performance Convenience

Just as hybrids offer ease of use, long-lasting makeup promises buy-in from both casual and more moderate users of makeup, as shown in the Mintel analysis. To align with the value proposition of hybrids, these long-wear solutions must absolutely be skin-friendly.

In November 2023, Exploding Topics noted immense viewership for TikTok posts featuring "power grip primers" (161 million). These primers not only ensure smooth makeup application but ensure long wear. E.L.F. is reportedly the top brand associated with the category, experiencing a nearly 1,700% jump in search volume over the last two years.

## 3. Multi-use Formats

Mintel notes that moderate makeup users appreciate multi-use products such as sticks or powders that can be simultaneously applied to the lips, cheeks, eyes and more. This same cohort seeks out product formats that don't require extra brushes or applicators, maximizing convenience. Many of these will feature skin-friendly materials. (Are you detecting a theme?)

Examples of such multi-use formats include the Iris&Romeo Ceramide Multi-balm Lip+Cheek Cream Blush Stick; Nudestix Gel Color Lip + Cheek Balm; Danessa Myricks Beauty Colorfix Multi-Use Eye, Cheek & Lip Waterproof Liquid Pigment; Haus Labs by Lady Gaga Hy-Power Eye, Cheek & Lip Pigment Paint; and Mango People Mango Cream Blush & Lip Multistick.

## 4. Non-toxing Makeup

In January 2024 Spate noted significant growth in non-toxic product formats, including mascara, brow gel and makeup remover. Searches for dry eyes, a related concern, average 153.6K monthly searches in the United States, the firm noted.

In response to growing consumer concerns, Verla International, a private label contract manufacturer, has developed Credo clean, naturally derived and performance-driven mascaras.

The formulations use a new film former technology to create extreme lashes, per the manufacturer. Formulas can accommodate any combination of performance attributes: longer lengthening, extreme volume, maximum lift and curl, and growth enhancement. Furthermore, the mascaras are infused with a conditioning serum for healthy lashes. ■

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# SUSTAINABLE PERFORMANCE IN PACKAGING FOR BEAUTY & PERSONAL CARE

**From tottles to monomaterial dropper systems, packaging delivers consumer-preferred experiences and eco-friendly credentials.**



*From tottles to monomaterial dropper systems, packaging delivers consumer-preferred experiences and eco-friendly credentials. Image courtesy of YuliiaMazurkevych at Adobe Stock.*

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A recent range of launches and customer projects have revealed advances in both sustainable packaging design and high performance—proving tradeoffs between the two are increasingly unnecessary.

## The Return of the Tottle

Recent buzz at packaging shows has pointed to renewed interest in tottle formats for convenient, mess-free application of product.

For example, FusionPKG's new Revo Tottle is designed for the dispensing of low-viscosity and lightweight formulas such as serums, primers, foundations and more. Offering pinpoint application, product is dispensed via the company's SimpliSqueeze valve technology.

The Revo Tottle is produced using blow molding techniques to render its flexible Boston round profile. Brands can tailor the tottle's shape and aesthetics without added tooling costs, per FusionPKG.

The packaging can be produced with recycle-ready PP or PE/EVOH, along with PCR possibilities for all PP components.

According to the company, tottles have become increasingly popular due to their ability to enhance product performance, preserve formulation integrity and provide consumers with a more enjoyable and efficient application experience.



*The Revo Tottle is produced using blow molding techniques to render its flexible Boston round profile. Brands can tailor the tottle's shape and aesthetics without added tooling costs, per FusionPKG. Image courtesy of FusionPKG.*



*FusionPKG's new Revo Tottle is designed for the dispensing of low-viscosity and lightweight formulas such as serums, primers, foundations and more. Image courtesy of FusionPKG.*

## Sustainable Component Updates

Taiwan-based Epopack is making a sustainable update of the material composition of its L1 and L1L pump collars.

The L1 pump collar will transition from ABS to PP material, while the L1L pump collar will transition from ABS to PP material.

The new versions (available Q1 2024) will replace the old versions once stock runs out, per the supplier.

## Monomaterial Dropper & Bottle

Lumson Group has secured the licensing rights to APC Packaging's Mono-Material System Dropper & Bottle, expanding manufacturing for the pack.

The packaging design is fully recyclable with recycle code 5, per the producers, thereby reducing the overall environmental impact compared to conventional system.

"Our partnership with APC Packaging signifies our dedication to fostering innovation and sustainability in the packaging sector," a Lumson spokesperson said.

"We are delighted to collaborate with Lumson Group and provide them with the licensing rights to our Mono-Material System Dropper & Bottle," said Lisa Lin, CEO of APC Packaging. "Lumson's reputation as a leader in the cosmetic packaging industry makes them the ideal partner to extend the reach of our sustainable packaging solution to the European market. This marks an exciting step forward in our mission to reshape the packaging landscape worldwide."

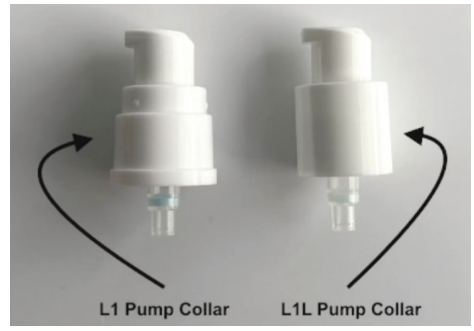
## Sustainable Heavy Walls

Epopack has unveiled a new 180 ml size for its AY Series PET Heavy Wall Bottles.

The range also features existing 100 ml and 150 ml sizes; all feature a sleek cylinder shape with a square shoulder, ass well as a large printing area. Deco options include printing, hot stamping, spray color and injection color.

The bottles comprise recyclable PET and can be paired with various closures, including lotion pumps, sprayers and screw-on caps with reducers.

The AY Series comprises recyclable PET.




*The L1 pump collar will transition from ABS to PP material, while the L1L pump collar will transition from ABS to PP material. Image courtesy of Epopack.*

## Glass, Refillables & More

Baralan recently unveiled new droppers for skin care and roll-ons. The company also offers amber glass pieces, which can protect formulas and boost sustainability with higher percentages of recycled glass.




*The APC packaging design licensed by Lumson is fully recyclable with recycle code 5, per the producers, thereby reducing the overall environmental impact compared to a conventional system. Image courtesy of APC packaging.*




*Epopack's bottles comprise recyclable PET and can be paired with various closures, including lotion pumps, sprayers and screw-on caps with reducers. Image courtesy of Epopack.*



*Baralan offers amber glass pieces, which can protect formulas and boost sustainability with higher percentages of recycled glass. Image courtesy of Baralan.*




*For its lightweight, fluid formulation, Supremÿa La Nuit, The Supreme Anti-Ageing Skin Care, Sisley chose a custom Lumson package featuring an airless glass bottle with a pouch technology. Image courtesy of Lumson/Sisley.*

According to Baralan, the company can apply as much as 30% to 100% PCR material in packaging designs. It is also able to apply biobased materials to designs, as well as black pigments that aren't derived from organic waste or coal combustion.

Baralan's accessories include new 30 ml and 50 ml inner cups for its Maria Jars glass jars. The cups can be produced using materials such as PCR.

The company has also launched a series of capsules with different neck variants, as well as overpumps, lip and eye makeup applicators, and accessories such as wipers, pumps and cache pumps.

## Luxurious Airless Pouch System

For its lightweight, fluid formulation, Supremÿa La Nuit, The Supreme Anti-Ageing Skin Care, Sisley chose a custom Lumson package featuring an airless glass bottle with a pouch technology.

The airless pouch system reportedly keeps the formula intact and protects it from external contamination. After use, the glass can be separated from the other components and recycled.

The skin care package features a gold pump and overcap featuring brushed gold aluminum with a debossed logo. The pack's lacquering provides a mirror effect, while external lacquering is rendered in shaded semi-transparent shiny gold with UV screen printing on the outside.

## Lockable Refillable Jar

Roberts Beauty's Refillable Luxe Lock Jar features a hinged closure and a refill pod system for an aspirational, eco-conscious effect. The 50 ml jar is available in PP.

## Recycled Aluminum Mascara Packs

Le Volume De Chanel mascaras now feature G.Pivaudran-developed packaging comprising recycled aluminum.

The mascara packs comprise 10-20% PCR content, depending on the model décor.

G.Pivaudran collaborated on the project with aluminum specialist Constellium since 2018, overcoming technical challenges such as issues with deep stamping and maintenance of a smooth or brushed decor.

The companies also worked to ensure maintenance of aesthetics following anodization and sought to ensure stability of raw material featuring recycled content.

The updated packs can be found in the Volume, Volume Revolution and Volume Stretch products.

Chanel Parfums Beauté will reportedly be collaborating with the supplier on further projects throughout 2024.

"We would like to thank Chanel who has allowed us to support it in a strategy which so befits out own image, and which we will continue," said Marc Pivaudran, CEO of G.Pivaudran.




*G.Pivaudran collaborated on a project with aluminum specialist Constellium since 2018, overcoming technical challenges such as issues with deep stamping and maintenance of a smooth or brushed decor. Image courtesy of G.Pivaudran/Chanel.*

## Packaging Consolidation Continues

Meanwhile, Berlin Packaging has announced it has acquired Alpack Limited, a family-owned food packaging supplier in Dublin, Ireland.

Alpack supplies a wide range of food packaging products, including glass bottles and jars, twist-off caps, cardboard boxes and eco-friendly containers.

Sasha Erben, who leads Berlin Packaging's United Kingdom, Ireland and South Africa regions, said, "This acquisition not only strengthens our business in Ireland but also expands our food packaging offering and provides even more packaging options for our customers."

Peter Lord, managing director of Alpack, said, "We are proud to join Berlin Packaging and to bring our experience in food packaging to the rest of the company. I'm certain this new chapter will benefit our customers in Ireland as well as the United Kingdom and provide even more opportunities for our employees." ■


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# SPF EVERYTHING

**Sun care's skinification has led to a boom in multifunctional SPF products, even as sunscreen formulations become better than ever.**



*New ingredient technologies are improving the spreadability and transparency of sun care products. Image courtesy of Yakobchuk Olena at Adobe Stock.*


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Consumer usage of sunscreens to prevent cancer grew[a] 20% in 2023, versus 2021, per Mintel; in fact, 54% of sunscreen users reported more frequent product application compared to 2022. Yet growth in the sunscreen sector is expected to be modest through 2027 "due to the rise of multifunctional personal care products that include SPF," according to the firm, which added that 57% of surveyed consumers reported daily use of SPF-boosted personal care.

As a result, Mintel analyst Carson Kitzmiller wrote, "Sunscreen brands should look to incorporate ingredients, benefits and claims traditionally seen in the facial skin care space to offer benefits beyond sun protection and anti-aging and prove value in daily routines."

"[W]e are seeing a growing 'SPF-everything' trend," says Jeffrey Martin, director of marketing, Federal Package, reportedly the largest independent lip care manufacturer in the United States. "Consumers are considerably savvier about the harmful effects of UV radiation and sun exposure. Brands have jumped on this trend by incorporating some degree of sun protection factor into their formulas. This adds additional value to a formulation."

[a]www.mintel.com/press-centre/sunscreen-fountain-of-youth-use-of-sunscreen-for-anti-aging-purposes-increased-25-from-2021-22/




*Federal Package offers both stock and custom lip balm formulas manufactured with hot pour, anhydrous filling processes. Hot pour formulations can reportedly have a longer shelf life because the blending process doesn't include water and oil phases, which can separate over time. They also are less prone to bacteria growth since they typically don't have water, so there is little for the microorganisms to feed off. Furthermore, waxes help products maintain their function and quality, acting as an emulsifier for other ingredients. They prevent oils from separating within the product and keep other ingredient substances together, per Federal Package. This purportedly makes a more homogenous finished product. Image courtesy of Federal Package.*

Notably, he says, "The latest interest is incorporating SPF in lip balms. By adding SPF to a lip balm formulation, brands get moisturizing and sun protection in a single product. At Federal Package, we offer stock lip balm formulas with SPF built in as well as natural, organic and vegan formats to help our customers find the right fit for their market."




*Federal Package's lip balms are available in any Pantone color and a wide variety of stock and custom styles; containers can be finished with several decorating options. Sizes range from 0.05 oz to 0.21 oz, including propel-repel containers and a variety of caps. All injection molding and automated assembly are done on-site at the company's FDA-registered facility in Chanhassen, Minnesota. Image courtesy of Federal Package.*

## 4 SPF Innovation Opportunities

With so much competition from multifunctional SPF personal care products, pure-play sunscreens will need to be formulated to overcome the category's experiential and textural issues. At the same time, both sunscreens and multifunctional SPF beauty will need to address underserved sectors, from melanated skin to clean formulations.

Here, we round up top opportunities to capture shoppers with relevant SPF/sunscreen innovation.

### 1. Improved Ingredient Technologies: Texture, Spreadability & Transparency

In the last three to four years, sun blocks have featured improved spreadability, says Sundeep Gill,

owner of beauty manufacturer Sun Deep Inc. At the same time, SPF boosters have enhanced defensive performance, he explains.

For instance, the application of butyl octyl salicylate (BOS), a common inactive booster, delivers emolliences while solubilizing and stabilizing sunscreen actives in formulations. He adds that the use of nano materials have evolved as understanding of particle agglomeration has advanced, allowing for the use of materials in the 30-40 nm range. This allows for formulations that feel much smoother than the "diaper paste" textures of the past.

Elsewhere, Siltech's Siltech CA Plus (INCI: dimethiconol/caprylylsilsesquioxane/silicate crosspolymer) comprises a hydrophobic Q-resin-modified silicone that disperses pigments and sunscreen filters. It also provides water repellency and emolliency to formulations while providing a smooth sensorial effect.

Advances in zinc oxide technologies—the preferred SPF filter of North America, per WGSN[b]—have also improved the category, according to Gill. For instance, BASF's Z-Cote Max broad-spectrum UV filter features greater transparency than some conventional equivalents.



*In the last three to four years, sun blocks have featured improved spreadability, says Sundeep Gill, owner of beauty manufacturer Sun Deep Inc. Image courtesy of Andrey Popov at Adobe Stock.*

Transparency is central to new Croda offerings based on its Solaveil Clarus technology, which delivers a tightly controlled particle size distribution. Solaveil CT-60W is a titanium dioxide ($TiO_2$, the preferred SPF filter of Asia Pacific, per WGSN) 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 $TiO_2$ while the SPF efficacy remains uncompromised, per the company.

Croda also launched Solaveil CT-300, a dispersion of hydrophobic titanium dioxide in a naturally derived carrier oil that provides high SPF efficacy with true transparency on the skin. Solaveil CZ-300, meanwhile, is a dispersion of zinc oxide in a naturally derived carrier oil that provides effective UVA protection with true transparency on the skin.

EverZinc's Zano ultrafine zinc oxide, meanwhile, is highly transparent and features broadband UVA/UVB absorption properties. Variants include Zano 10 (in standard and Plus editions) and Zano 20 (in standard, Plus and Plus 3 editions). According to Gill, Zano 20 disappears on the skin but

[b]www.wgsn.com/beauty/p/article/6492592c6311e6dd591c1ffb



*Mintel reports that 49% of Black consumers use sunscreen, with 54% applying product more often in 2023, versus 2022. Image courtesy of Rido at Adobe Stock.*

boosts SPF less than Zano 10, which disappears less easily. To make up the difference, he says, formulators may add a sunscreen booster to a formulation featuring Zano 20.

Critically, says Gill, boosters can allow formulations to achieve SPF 30 protection with only a physical sunscreen ingredient listed as the active.

To speed up the formulation development process, Gill says his company conducts preliminary R&D testing in-house. By conducting initial in vitro investigational work during the development process, Gill says he's able to speed up the process of achieving final regulatory approval.

With so many new boosters, he says, it's critical to conduct more background testing and validation to avoid rejections that cost time and money.

These improvements in ingredients and processes are critical, particularly because so many brands are looking to round out their product assortments with SPF-enhanced products.

### 2. Improving Formulations for Melanated Skin

Mintel reports that 49% of Black consumers use sunscreen, with 54% applying product more often in 2023, versus 2022.

Unfortunately, the firm explains, "84% of U.S. Black sunscreen users wish there were more product options made specifically for their skin tones," pointing to significant opportunities for product innovation. The key challenges for inclusive sun care are well-known, particularly white cast/lack of blendability upon application.

"[S]ome consumers may find traditional SPF products unpleasant to use because they can leave a white cast or have an unpleasant greasy or sticky feeling," says Alex Walther, technical services manager, beauty and personal care, Univar Solutions. "That is why new ingredient technologies are being developed to make SPF products more appealing and effective."

She continues, "For instance, new mineral UV filters with optimized particle size can greatly reduce white cast. By choosing new emollients and emulsifiers that are designed to help wet out mineral UV filters, the formula will have closer transparency on the skin."

Walther concludes, "Once a homogenous dispersion of the UV filter is developed, the next most important choice is the emollients. New emollient technologies offer the balance of fast-spreading oils that leave a powdery, yet moisturized finish that is comfortable to wear. These new emollients allow formulators to create products with SPF that have a pleasant texture and sensory experience."

Univar has developed a proof of concept formula highlighting several of these principles. The SPF 30 Tinted Cream Serum is a hybrid makeup with skin care benefits.

Key emulsifiers include Dow's Dowsil ES-5600 silicone glycerol emulsifier and Dowsil FZ-3196 fluid emulsifier, as well as a pair of inorganic UV filters from DSM-Firmenich, Parsol TX (titanium dioxide) and Parsol ZX (zinc oxide), and SunSpheres Bio, an SPF booster.

Other key ingredients include DSM-Firmenich's Valvance Touch 210 silica, Inolex's LexFeel WOW emollient and Dow's Dowsil DM silicone elastomer blend.

Skin-friendly materials in the formulation include DSM-Firmenich's Quali E vitamin E and Quali B niacinamide, and moisturizing Purasal NH/COS from Corbion.

As seen in the formulation breakdown, several ingredient firms have launched technologies to tackle the problem of sunscreens that leave a white cast on the skin. For instance, Tagra developed DeeperCaps to encapsulate pigments and shea butter with a double-layer cellulose/zinc oxide-based polymer to ensure optimal delivery and coverage of pigments with a natural finish—meaning no white cast or "ashy" look.

In addition, many of the transparency-focused ingredients discussed earlier in this article address some of these issues.

It's also important to acknowledge a number of inclusive, often POC-led brands that have made the white cast complaint a key consideration of their product claims, including Kinlo, Black Girl Sunscreen, Undefined and Cay Skin.



*Notably, consumers aged 25-44 over-index for skin protection product usage, with key concerns including pollution and blue light. Image courtesy of lielos at Adobe Stock.*

### 3. Sun Care as Anti-aging

Nearly 70% of consumers use sunscreen to prevent aging, per Mintel, highlighting shoppers' awareness

of environmental impacts of sun exposure. It also makes clear that adding SPF to anti-aging products can be a strategy consumers will embrace.

Notably, consumers aged 25-44 over-index for skin protection product usage, with key concerns including pollution and blue light. This points to a desire for products offering sun defense alongside allied claims. This holistic approach could potentially lead to greater and more frequent usage of defensive care products.

### 4. Multifunctionality as a Value Proposition

As the anti-aging movement in sun care shows, multifunctionality can be a winner. Euromonitor data builds on this theme. The firm reports[c] that "rising demand of SPF moisturizers in Western Europe" reflects a desire for products that offer a superior sensory experience (texture, scent, etc.) compared to conventional sunscreens. It also points to a desire to achieve multiple benefits simultaneously (hydration and defense).

Per WGSN data, moisturizers are the largest North American sun care category (based on online retail sales), followed by body lotion (the worldwide leader) and foundation.

While value-seeking consumers are a natural audience for these multifunctionals, combining skin care claims with SPF defense can allow brands to offer innovation at a premium. To see this innovation in action, one can look to Byoma's Moisturizing Gel-Cream SPF 30, which offers broad spectrum protection from UVA/UVB rays, instantly absorbing into the skin and leaving a glowing, radiant finish with zero white cast, as well as Skin Proud's Gen Z-friendly Serious Shade Lightweight Hydrating SPF 50 Sun Serum, designed to provide broad-spectrum UVA/UVB protection.

According to a report from WGSN, SPF 30 is currently the preferred defense level in North America, a market that prefers spreadable, lotion-like formats in sun care.

Looking ahead, Euromonitor anticipates future daily use moisturizers featuring SPF 50+ and benefits including hydration, reduction of dark spots, fine lines and pores. Meanwhile, WGSN has identified rising claims in the category, including "buildable" and "washable," as well as increasingly popular formats such as serums and gels, powders, and sticks and similar portable formats. ■




*Skin Proud's Gen Z-friendly Serious Shade Lightweight Hydrating SPF 50 Sun Serum is designed to provide broad-spectrum UVA/UVB protection. Image courtesy of Skin Proud.*

[c]www.euromonitor.com/article/spf-moisturisers-moment-in-the-sun-how-skinification-is-changing-sun-care-in-western-europe

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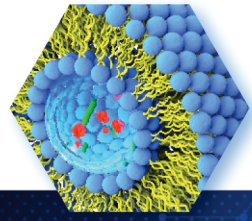
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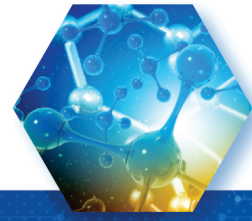
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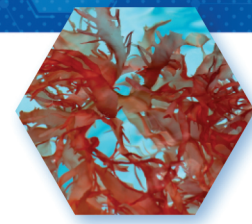
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