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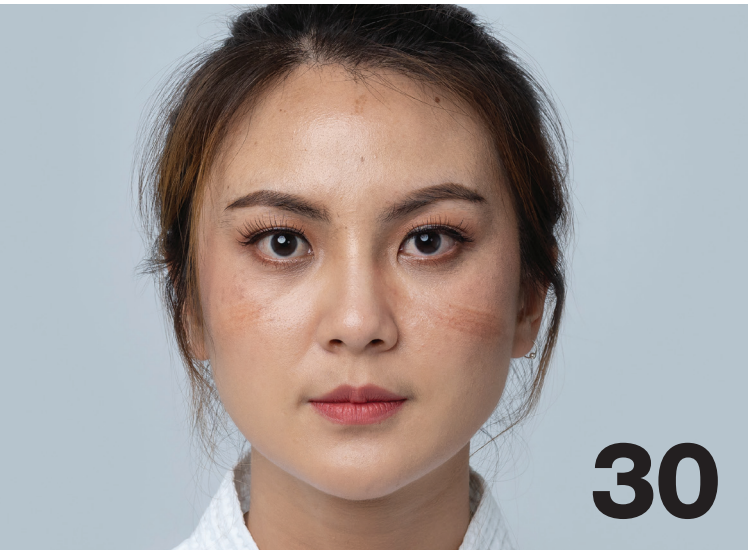
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GLOBAL COSMETIC INDUSTRY®

EDITORIAL

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

SOCIAL MEDIA

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

ADVERTISING SALES

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

AUDIENCE DEVELOPMENT

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

DESIGN

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

CORPORATE

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Teens x Beauty: a Growing Fanbase



Tweens love beauty for a complex mix of reasons.

Great news for the industry: young people *love* beauty.

As of spring 2024, U.S. teens' beauty spend has risen 8% year-over-year to $339, per the Piper Sandler Companies' 47th semi-annual "Taking Stock With Teens" survey[a]. This represents the highest spend recorded since spring 2018.

The survey results feature feedback from 6,020 teens with an average age of 16.1 years.

Color cosmetics are the top sector teens are spending on. That said, fragrance spend has spiked 23% year-over-year.

e.l.f. remains the top color cosmetic brand, jumping 16 points year-over-year to 38%; it also ranks in the top 10 skin care brands and beauty destinations among the teens surveyed.

According to the survey, 85% of teens prefer to shop in-store. Sephora is gaining on Ulta with these shoppers, but both have about 60% loyalty membership penetration among teens.

According to most sources, 16.1 years is much older than the average Generation Alpha shopper, born between 2010 and 2024, with the oldest cohort just now aging into early beauty product engagement.

In a February 2024 CEW briefing[b], Circana's Larissa Jensen reported that while prestige beauty spending grew 6% in households without children, it spiked 16% in those with children, signaling emerging engagement among young consumers.

While controversial, the power of "Sephora kids" is undeniable.

During the same CEW briefing, Google data revealed that skin care searches increased in 2023, particularly among Generation Alpha consumers.

There are clear concerns when it comes to kids—particularly girls—engaging with beauty products.

Key worries include usage of products intended for older shoppers, especially products with potentially harsh active ingredients, as well as well-founded issues around unrealistic "beauty" expectations.

Yet a recent NPR report unveiled a less aesthetic reason for using beauty products. One child, "Milly," said skin care "makes me feel kind of, like, put together and less like ahhh all over the place."

Another child quoted in the report, "Ana," shared, "It kind of gives me motivation … [I]t just makes me feel, like, organized."

Spate data revealed in February, separate from the CEW briefing, that TikTok hashtags related to Sephora belie a rise in young consumer engagement: #teenskin, #skincarefortweens and #momtips.

Similarly, high-growth hashtags associated with Ulta include #skincareforkids. Among the retailer's most popular content is a video focused on a store adviser discussing suitable skin care products for tween girls.

So while parents may differ on how much beauty product use is acceptable when, it's clear that young consumers are engaging in the sector across categories.

[a]www.gcimagazine.com/consumers-markets/news/22892607/us-teens-beauty-spending-jumps-8-vs-last-year
[b]www.gcimagazine.com/consumers-markets/article/22889775/decoding-generation-alpha-beauty
[c]https://www.spate.nyc/beauty

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JEB GLEASON-ALLURED
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INSIDER INSIGHTS:
PACKAGING FOR BEAUTY LAUNCHES + HAIR CARE INGREDIENT LAUNCHES

Industry experts share what trends they are seeing in these spaces.

Featured insiders…

- Baralan Group
- Jojoba Desert
- Mibelle Group Biochemistry
- PKG Group/YonwooPKG
- SGD Pharma



Sustainability is driving packaging for beauty, meanwhile scalp care tops the hair care trends.

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PACKAGING FOR BEAUTY TRENDS + LAUNCHES

Global Cosmetic Industry spoke with beauty insiders to highlight what is trending in the hair care and packaging industries.

Eco-friendly Packaging

Sheherazade Chamlou, VP sales beauty, Americas, SGD Pharma, says, "The packaging industry is going through a radical transformation with consumers voicing a strong preference for more eco-friendly products. The environmentally conscious consumer and beauty brands are turning their attention to refillables as a solution to reduce their packaging waste and carbon emissions. SGD Pharma's glass offerings achieve both the high level of aesthetic and performance required for quality cosmetic packaging while delivering on the promise of sustainability. SGD Pharma's Eclipse refillable glass jar is a versatile and sustainable option for a wide range of beauty and wellness products, offering an effortless replacement and recycling experience. This eco-designed full packaging solution features a twist and lock system which allows the inner plastic capsule to be easily loosened and secured to the glass jar without any adhesive or tools. Its refillable nature allows consumers to reuse the jar with a new product-filled capsule, significantly reducing single use packaging and their environmental footprint. The Eclipse refillable glass jar is fully customizable, offering brands a wide range of decoration possibilities like lacquering, frosting, metallization, silk printing and many more. Increasing the sustainability of packaging through the reduction of carbon footprint and more circular designs is another trend in the packaging industry. SGD Pharma recently unveiled Nova, a lightweight glass packaging solution. Nova is the innovative result of SGD Pharma's expertise in narrow neck press and blow (NNPB) forming technology in pharma bottles. This technical know-how is already used in its Clareo offering of premium pharma glass vials and is adapted here for the benefit of cosmetic and beauty customers. The weight reduction is combined with a glass distribution optimization providing better mechanical resistance. Nova bottles look appealing, withstand transport and distribution pressures, and have a smaller carbon footprint."



SGD Pharma's Nova lightweight glass solution.

Courtesy of SGD Pharma

Chamlou continues, "Reducing the weight of packaging materials is a promising solution to minimize GHGs emissions. On the new 200 ml bottle in its Nova range, SGD Pharma estimates a 20% reduction in CO_2 emissions compared with the standard Dorado bottle thanks to less raw materials consumption. The weight-volume ratio is an important parameter to measure the lightness of glass bottles and the ratio of conventional cosmetic



SGD Pharma worked on the Estee Lauder Micro Essence Treatment Lotion - Limited Edition - Hueman designed bottle.

bottles produced by blow and blow process ranges from 1.0 to 3.0. The new 200 ml bottle in the Nova range (brimful volume 215 ml and weight of just 140 g) has reached an extremely low weight-volume ratio 0.65, while retaining the same properties and safety as the heavier Dorado model. Nova therefore enables weight reduction in the supply chain and appeals to the consumer drive for green packaging. As sustainable packaging becomes an important axis for a carbon-neutral future, we can expect to see more recycled glass, light weight bottles, and refillable options as part of the eco-design revolution."

Chamlou concludes, "To support brands' identity and differentiation, SGD Pharma is constantly evaluating and creating glass packaging solutions based on several criteria including eco-friendliness, reusability, as well as offering highly attractive decorative solutions paired with new sensorial experiences. One recent launch which SGD Pharma had the opportunity to work on is the Estee Lauder Micro Essence Treatment Lotion - Limited Edition - Hueman designed bottle. To execute the colorful imagery, SGD Pharma's Beauty & Care opted for an innovative digital printing process to maintain artwork integrity while minimizing environmental impact. Thanks to the advanced digital printing technique developed by SGD Pharma, this artwork with colorful mashups could be printed on the irregular surface of the glass bottle and the details of this artwork could be preserved to the largest extent possible creating a packaging experience that is targeted, individualized, and personalized. What sets this product apart is its execution of decoration through digital printing. The intricate details and exquisite design of the Hueman Designed Bottle truly captivate the eyes and leave a lasting impression. The cutting-edge digital printing decoration technology breaks through the boundaries of traditional screen printing in color richness and finesse. SGD uses digital printing to realize extremely colorful artwork with multilayer details, which maximizes the originality of the design, so that the designer's concepts are conveyed in entirety."

Maurizio Ficcadenti, global R&D manager, Baralan Group, says, "Innovation for Baralan is the real trend [and] on this basis Baralan builds its product range proposal every year. Innovation—sustainable innovation—is now a mandatory strategic approach for industrial companies. Baralan, which has been part of the primary cosmetic packaging industry supply chain for over 60 years, aims to develop new and creative solutions to meet the current needs of the constantly evolving market without compromising quality, performance and product needs. Personalization, glass as the sustainable solution,

Courtesy of SGD Pharma

sustainability, inclusivity, refillable and rechargeable are the trends. At Cosmoprof Bologna we announced a new era for customization, the 3D Decoration for cosmetic packaging. Glass is seeing growing interest precisely in a green perspective. From Baralan first glass airless to refillable and rechargeable solutions for glass. Furthermore, it was fundamental for Baralan to be able to create the new 3D Decoration, which is a significant and distinctive innovative solution for glass decoration, also translating into a concrete commitment towards sustainability, thanks to the reduction of the need for equipment and massive production to diversify in the market of cosmetics. Thanks to this project, it is now possible to have a unique, recognizable and prominent product, without having to invest in expensive equipment, while at the same time promoting eco-sustainability. 3D printing on glass and plastic proves concrete thanks to its adherence to the glass, transparency and charm through the use of infinite colors and designs."

Ficcadenti continues, "The latest product novelty announced at Cosmoprof Bologna, the new 3D Decoration, is definitely one of the most important of 2024 that will lead to a new era of personalization by Baralan. A project developed in collaboration with Stratasys, a leader in 3D printing and ICA, a global reference point for innovation in the glass and plastic coating sector at Cosmoprof Worldwide Bologna announced a new three-dimensional decoration solution for cosmetic packaging. An innovative solution for three-dimensional glass decoration and plastic accessories, tailor-made for the cosmetics sector. Thanks to the innovative GP3DPrint water-based paint product developed by ICA exclusively for Baralan (also combinable with solutions from the Bio range), it is now possible to obtain reliable three-dimensional graphics applied on all the packaging offered by Baralan using Stratasys Polyjet technology. Baralan underlines how this opportunity paves the way for 3D printing in the world of mass production, with advantages in terms of costs, times and opportunities. This also translates into a concrete commitment to eco-sustainability, thanks to the reduction of the need for equipment and massive production to diversify in the cosmetics market."

Ficcadenti concludes, "Baralan standard collection is also enriched with a whole new range of items, other than glass, accessories, applicators and closures. A new focus is given to amber glass, with new items that enlarge Baralan's range for the cosmeceutical world. Glass continues to be the core, but Baralan confirms its commitment to sustainability, offering new standard products with a lower environmental impact, increasingly promoting the use of refillable packaging and also the possibility of using alternative materials, such as PCR used in percentages ranging from 30% to 100%, bio-based, no carbon black or organic waste. Among the latest accessories, the new 30 ml and 50 ml Inner Cups for Maria Jars glass jars stand out. Featuring an all-new design that balances comfort with environmental responsibility, the new Inner Cups promote the possibility to refill glass jars and use alternative materials, such as PCR. The new 2024 collection includes new series of capsules with different neck variants, overpumps, new proposals of lip and eye makeup applicators, and accessories such as wipers, pumps and cache pumps, with the aim of providing customers with an increasingly wider and more complete offer and exclusive, unique packaging solutions."



Baralan launched 3D decoration for cosmetic packaging.

Courtesy of Baralan

Colorful Packaging

Eric Csazar, regional sales manager at PKG Group/YonwooPKG, says, "One of the biggest trends that we have seen over the last couple of years in the beauty industry is the increase of color packaging on retail shelves. Brands are moving away from traditional colors (black, white gold) to brighter/softer colors (yellow, pink, orange, green, blue, purple) that stand out. Over the last couple of years, the shelves of Sephora, Ulta and even Target have been stocked with more distinct and unique packages from a variety of shapes to brighter colors. Colored packaging in the beauty industry creates a more minimalistic, natural look through soft yet bright colors. It gives the packaging a cleaner aesthetic which attracts consumers from all age groups. In the early 2000s there was a clear difference between beauty products marketed toward children/teenagers and adults. With the evolution of cosmetics packaging through shapes and colors, a younger demographic has been attracted to luxurious skin care and makeup market. We are seeing more indie brands come out with more colorful, cute packaging for consumers that are marketed for all age groups. A big movement that has impacted the color packaging trend is sustainability. As brands want consumers to see their packaging as sustainable options through reducing plastic waste, to having refills available. Colored packaging and brand image are closely tied together regarding how consumers perceive a beauty brand."

Csazar continues, "At PKG Group/YonwooPKG, we offer in house decoration capabilities that amplify brand identity around color palettes, textures, and metallic tones. We offer extensive decoration options such as hot stamping, coating, screening, anodization, spray paint, metallization, printing, etching and heat transfer. Here at PKG Group we can get a perfect color match with no visualized edges. As consumers are changing how brand's view sustainability, a new emerging trend has been offering refillable packaging solutions. In the past after finishing up a beauty product, consumers would just toss the package and rebuy the whole package. Now with refillable options, it is marketed as reducing plastic waste, by only buying the refillable component. Sustainable in the beauty industry is geared to reduce plastic waste consumption and promote eco-friendly refillable packaging components. Refillable packaging components can include small pouches, pans or inserts that can be placed back into the existing packaging. The most common beauty products that offer refills are hair care, skin care [and] makeup. Brands such as ASA beauty, conscious chemist, L'Occitane En Provence, Bare Necessities, Khiel's have entire products lines with refillable options for consumers. Other brands have refillable packaging components for certain beauty products such as Charlotte Tilbury, Fenty Beauty, Hourglass Cosmetics, UpCircle, Byoma [and] Ouai."

Csazar concludes, "At PKG Group/YonwooPKG we have an extensive line of refillable packages for skin care such as Tension Body, Eco Ampoule, Diamond, EZ airless. PKG Group has patented the EZ airless refillable package. To change out the refillable component, the consumer needs to remove the transit cap at the bottom and insert the refill into the outer bottle and screw tight until you hear the click. PKG Group has provided consumers with a refillable package that is easy to use and to change out. Ease of use is the key when creating refillable components for beauty products and can be seen throughout PKG Group's refillable product line. The Eco Ampoule is a refillable packaging solution made for the beauty, cosmetic, skin care markets. The Ampoule vile shapes give the product a cosmeceutical aesthetic and is suitable for functional cosmetics. The Eco Ampoule comes with three applicator options: metal ball, silicone tip and snow man hole. Available with a refillable option that screws out from the bottom and is easy to put back into the main packaging component. The Eco Ampoule is made with recycled materials PP/PE. The EZ Airless gives off a classic lock with a modern feel, due to dual structure wall with refill capabilities. The EZ airless is a refillable packaging component, that has the audible click sound when the refill is engaged. This is the perfect packaging solution for the skin care and makeup markets. The EZ airless is available in various sizes. The EZ Airless is the perfect example of an innovative and sustainable packaging solution from PKG Group." ■



PKG Group/YonwooPKG's Eco Ampoule is a refillable packaging solution made for the beauty, cosmetic and skin care markets.

Courtesy of PKG group/YonwooPKG

HAIR CARE
INGREDIENTS TRENDS + LAUNCHES

Global Cosmetic Industry spoke with beauty insiders on the trends shaping hair care beauty products.



JD Lusteris by Jojoba Desert offers a silky, sensory experience and sebum control properties, which are essential for hair and scalp care.

Courtesy of Jojoba Desert

Scalp Care

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

Rot continues, "JD addresses these trends with our innovative multifunctional JD Lusteris, a natural emollient derived from Jojoba oil. This product is a testament to our commitment to sustainability and innovation. As a biome-friendly alternative to traditional silicones, JD Lusteris offers an extraordinary silky sensory experience and sebum control properties, which are essential for hair and scalp care. Moreover, it has deep soothing effects and offers benefits for sensitive skin, making it an excellent ingredient for hair care products. This represents our commitment to meeting the evolving needs of the hair care market, focusing on scalp health and healthy, youthful looking hair."

Christine Meier, senior digital marketing manager, Mibelle Group Biochemistry, says, "Scalp care is still an evolving area where lots of innovations are being launched. For example, brands are increasingly focusing on chemical exfoliation, which is beneficial for removing product buildup, slicing through oil, unclogging pores and preventing scalp acne."

Hair Glossing

Meier says, "We see hair glossing as a big trend at the moment. The glow beauty trend in skin care is increasingly extending to hair care. Customers are looking for that sleek and shiny look. This surge in interest led to the popularity of various hair gloss treatments (in salons), followed by a demand for at-home treatments. This popularity is also visible in search terms on social media."

Skinification

Meier says, "The skinification is a trend which is very visible in hair care too. Ingredients formerly reserved for skin care are making their way into hair care (for example, hyaluronic acid), as seen in trends like hair glossing or hair Botox." ■

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While styling is the latest front in the skinification of hair care, every category continues to experience the trend.

Image by Volodymyr at Adobe Stock

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6 HAIR CARE INNOVATION HOT SPOTS FOR 2024

From dry shampoos to peptide-forward formulations, ingredient firms and brands are pushing the innovation envelope.

Prestige hair sales[a] grew about 14% in 2023, compared to 6% in mass, per Circana. But it's the category- and claims-level details that tell a richer story and points to opportunities for new innovation.

This includes breakthroughs in dry shampoos, a revolution in hair styling and peptide-centric formulations.

Here, we break down the six most compelling trends driving innovation.

1. The Skinification of Hair Styling

As BASF noted in a recent trend briefing to *Global Cosmetic Industry*, skinification of hair care is a major trend in North America, impacting the types of formulas that consumers are drawn to.

The trend is driven by consumers' desire for recognizable skin care materials and formats intended for the hair and scalp. This has been a boon for formats such as serums, exfoliants, masks and oils.

Now, skinification is migrating to the styling sector.

Hair styling was the fastest grower in the prestige hair category in 2023, per Circana, with dollar sales up 24%, driven by a more than doubling of launch volume compared to 2022.

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

"Various trends have made their way from skin care into hair care, with inspiration entering the category across ingredients, formats and claims language," says Michelle Chavez, vice president of innovation, Cobalt Labs. "But for stylers, it gets very interesting."

She continues, "From ingredients like fortified vitamins, hyaluronic acid and fermented extracts to formats like primers, serums and lotions, the styling aisle is looking more and more like the skin care aisle."

Chavez adds, "Claims are also experiencing a similar effect, with proactive protection benefits against heat, UV and pollution to advanced repair with bond building and targeted treatment. Additionally, we've started to see product positioning around 'type,' pulling more inspiration from the skin care category."

Chavez expects to see more stylers designed for specific hair and curl types for a more personalized user experience.

She concludes, "And the ultimate in skinfication of stylers is treating and caring for our scalp as skin … [The scalp] ages too, leading to a decline in hair health due to decreasing levels of collagen, a lack of proper blood circulation and potential nutrient deficiencies as we age. New innovations in styling products will provide benefits to calm inflammation and soothe the scalp while maintaining the scalp microbiome and strengthening hair at the root."

Nexxus recently launched an 11-SKU range of stylers that provides enhanced care. For instance, the Prep & Protect Heat Defense Spray detangles strands and offers heat protection and defense against humidity and frizz. Meanwhile, the Curl Define Soft-Hold Curl Cream hydrates the hair while defending it against humidity and frizz. The formulation comprises a silk protein and hyaluronic acid, familiar materials from the skin care space.

Elsewhere, Carol's Daughter launched the Goddess Strength



Carol's Daughter launched the Goddess Strength Smooth & Shape Balm and the Black Vanilla Moisture & Hold Jelly stylers, both "designed to nourish the hair while creating a long-lasting hold … without breakage or buildup."

Image courtesy of Carol's Daughter

Smooth & Shape Balm and the Black Vanilla Moisture & Hold Jelly stylers, both "designed to nourish the hair while creating a long-lasting hold … without breakage or buildup."

The Goddess Strength Smooth & Shape Balm's ingredients include castor oil, ginger and black cumin seed, materials that support the well-being of curly, coily and heat-styled hair. They also reportedly protect the hairline from damage from styling and brushing.

The Black Vanilla Moisture & Hold Jelly, meanwhile, features shea butter, jojoba oil, vanilla and no drying alcohols.

"I am thrilled to introduce our latest innovations, the Goddess Strength Smooth & Shape Balm and the Black Vanilla Moisture & Hold Jelly," said Lisa Price, founder of Carol's Daughter, at the time of the launch. "These new styling products not only maintain the strength and moisture of every curl and coil but also empower individuals to express their unique style with confidence and ease."

2. The Skinification of Everything

While styling is the latest front in the skinification of hair care, every category continues to experience the trend.

For instance, JVN's recently launched Intense Hydration Mask, designed to "infuse moisture, reduce frizz and nourish split ends," features skin care-inspired ingredients, including hemisqualane and amino acids, as well as Keratris, the brand's vegan keratin.

Elsewhere, Garnier Fructis' new Hair Filler product line is inspired by the power of skin fillers and was launched with a marketing push that features social media dermatologist influencer Muneeb Shah, D.O.

The affordable bonding collection features the Pre-Shampoo Bonding Inner Fiber Repair Treatment, designed to repair and smooth damaged hair cuticles, as well as a Strength Repair SKU with Vitamin Cg, featuring citric acid, a repair complex and vitamin Cg (ascorbyl glucoside). It also features Moisture Repair with hyaluronic acid and Color Repair with ceramides.

The collection launches at a time when, as Spate points out, "bond repair" online searches have experienced 210.3% growth, year-over-year. No surprise, top related brands in the search space include Epres, Alterna, Amika, The Inkey List and Olaplex, alongside formats such as shampoo, treatment, conditioner, mousse and oil.



Garnier Fructis' new Hair Filler product line is inspired by the power of skin fillers and was launched with a marketing push that features social media dermatologist influencer Muneeb Shah, D.O.



In the first quarter of 2024, K18 came onto the scene with the new smart-release OdorBind biotechnology, designed to "recognize, suspend and eliminate odors" for as long as 3 days, per the brand.

L to R: courtesy of Garnier; K18



In March 2024, Dove launched its Scalp + Hair Therapy Density Boost range for the hair and scalp. Per the brand, 89% of women who tested the product "saw thicker, stronger hair after using Dove Fullness Restore Scalp Serum."



The top U.S. prestige hair launch item in dollar volume sales for 2023 was Living Proof's Perfect Hair Day dry shampoo, per Circana.

Key related concerns, per Spate, include protection and anti-aging, alongside ingredients such as protein and caviar.

3. New Innovations in Dry Shampoos

Dry shampoos had a good year in 2023. The top U.S. prestige hair launch item in dollar volume sales for 2023 was Living Proof's Perfect Hair Day dry shampoo, per Circana, while the top mass launch was Batiste's Bare Dry Shampoo.

In the first quarter of 2024, K18 came onto the scene with the new smart-release OdorBind biotechnology, designed to "recognize, suspend and eliminate odors" for as long as 3 days, per the brand.

Featured in the non-aerosol AirWash dry shampoo, OdorBind features biotech-derived Mediterranean microalgae and reportedly works in tandem with translucent microbeads that "sponge up oil without feeling gritty or leaving behind excess buildup or white cast." The formulation also eschews heavy fragrances.

The result is improved hair manageability and a healthier scalp, per K18. The results can reportedly last for as long as 3 days.

The K18 launch aligns with consumer demands in the sector.

"One specific trend we see trickling down from skin care is extending the results of your professional treatments," says Michelle Chavez, Vice President of Innovation. "For hair care, this translates to extending the life of your look. At Cobalt Labs, the innovation department at Accupac, we've formulated an innovative Dry Shampoo Mist, which helps extend the life of your style between washes. The non-aerosol, mist format helps cleanse and refresh the scalp while absorbing oil and neutralizing odor without weighing hair down."

4. Peptides for Healthier Hair & Scalps

Spate[b] has shown that hair growth claims are increasingly popular in the U.S. market due in part to an aging population.

This is evidenced in high search volume for thick hair queries, as well as searches involving growth-related materials such as minoxidil, ketoconazole and dutasteride, as well as brands like Nutrafol.

Demands for revitalized, healthier hair have been a boon for peptide-based innovation.

In October 2023, Exploding Topics[c] reported that "TikTok videos about hair peptides have surpassed 1.1 billion views," notably due to their ability to repair and nourish hair, as well as boost elasticity and strength by stimulating collagen.

This ensures continuing interest in emerging peptide technologies and claims, including bioactive solutions for the scalp.

For instance, BASF's natural PeptAIde 4.0 peptide, launched in 2020, is derived from organic rice protein containing four peptides discovered via AI. Together, these materials deliver a well-aging solution for skin, scalp and hair, per the company.

Consumers that tested the technology in a shampoo format reportedly experienced a reduced appearance of redness on the scalp, while maintaining healthy scalp oil and pH levels.

These consumers also had a "significant positive perception related to scalp cleansing, hair volume, scalp comfort, and the feel and appearance of a healthy scalp," per BASF.

[b]www.spate.nyc/beauty

[c]https://explodingtopics.com

L to R: courtesy of Dove; Living Proof

Meanwhile, Silab's Nutripeptides are designed to deliver hydration and a soothing action to the scalp following two months of treatment. The technology was designed to counteract mechanical, thermal, chemical and environmental stressors that can cause redness and irritation, as well as dull hair and lost volume.

Nutripeptides reportedly significantly reduce scalp redness and reduce IL-8 secretion, evidence of an anti-inflammatory effect, per Silab.

The technology also features a repairing action on the hair fiber, thereby restoring shine, density and volume within 1 month of use.

New brands have also put peptides front-and-center. For instance, V&Co., a new hair care brand at Target, features what it calls its Proprietary Peptide Blend, comprising peptides, amino acids, proteins and vitamins.

The brand pairs its core technology with hair-type-specific ingredients; for instance, the wavy shampoo and conditioner features rice protein, while the straight hair variants include aloe juice. Meanwhile, the brand's curly hair variants include jojoba oil, while its thickening SKUs highlight biotin and coconut oil alongside peptides.

5. Density is Destiny

According to Google Trend data, searches related to "hair density" have grown steadily since 2010 and accelerated in 2020 in conjunction with the COVID-19 pandemic, one side effect of which included hair thinning, whether via disease or emotional distress.

Since that time, a wide number of density-focused launches have hit the market.

Most recently, in March 2024, Dove launched its Scalp + Hair Therapy Density Boost range for the hair and scalp. Central to the launch was the Fullness Restore Scalp Serum, featuring niacinamide (vitamin B3), glycerin, peptide and zinc "to strengthen the scalp's skin barrier and boost hair density."

Per the brand, 89% of women who tested the product "saw thicker, stronger hair after using Dove Fullness Restore Scalp Serum."

One month earlier, Living Proof launched its Scalp Care Density Serum designed to reduce shedding, increase hair density, promote healthier hair growth (within 90 days) and minimize the appearance of gray hair.



The Hair Lab has launched a trio of moisturizing shampoo formulas customized to scalp types—dry, balanced or oil-prone. The formulations can be "supercharged" with the addition of as many as three of the 12 Hair Lab doses the brand offers. Dose options include formulations to address UV exposure, curls, breakage, frizz and more.

The brand touts a "density boosting technology" in the serum, as well as amaranth peptides, pea sprout extract, and a complex of antioxidant and amino acids.

According to Google data, top associated search terms related to hair density include The Ordinary's Multi-Peptide Serum for Hair Density, the one and only brand/SKU to make the top of the list.

Other associated terms include "serum," pointing to shoppers' preferred product format.



Lubrizol's Fensebiome heptapeptide is designed to provide barrier protection to the skin and scalp while also increasing the beneficial scalp microbiota, which can decrease with age.

6. Multidimensional Scalp Care

The relationship between healthy scalps and hair has increasingly taken center stage. As a result, according to Circana, sales of scalp care products jumped 42% in 2023, reflecting a wider interest in hair wellness.

From Top: courtesy of Hair Lab; Image by mimagephotos at Adobe Stock

Meanwhile, in January 2024, Exploding Topics reported that "scalp detox" online searches surged 51% in the previous 24 months. At the same time, scalp detox videos have accumulated more than 105 million views on TikTok, signaling widespread interest.

Per Exploding topics, trending scalp detox products include serums and scrubs, as well as ingredients designed to balance the scalp's microbiome or provide moisturization or cleansing.

On the supplier front, BASF's Rambuvital is an upcycled seed extract from organic rambutan that reportedly revitalizes and refreshes the scalp and hair and guards the scalp from pollution.

Tested in shampoo and conditioner formats, Rambuvital moisturizes the scalp and prevents odors from sticking to the hair strands, per BASF.

According to the company, "A significant number of consumers that used a shampoo and conditioner formulated with Rambuvital for 28 days perceived hair as less prone to breakage, better smelling for a longer time, and healthier looking and feeling."

Seppic's Alariane CV (INCI: aqua/water, butylene glycol, *Alaria esculenta* extract), meanwhile, simultaneously protects hair follicle cells and scalp lipids from exposomal factors such as heavy metals.

This extract of edible *Alaria esculenta* algae native to the northern coasts of the Atlantic Ocean features a binder/detoxifier effect against heavy metals, per Seppic.

Tests have reportedly shown that Alariane CV features the capacity to protect against cadmium, which can be found in cigarette smoke and phosphate fertilizers. In contact with cadmium, the scalp can be weakened and subjected to inflammation that prevents hair follicles from producing healthy hair.

By defending against cadmium exposure, Alariane CV can reduce follicle inflammation and preserve scalp function to maintain healthy hair, per Seppic.

Meanwhile, BASF's Patch20 A00297 moisturizing complex features a molecular 3D mesh composed of pullulan, alginate and hyaluronic acid, which provides "instant, cumulative and sustained moisture effects for skin, scalp and hair."

In formulations, Patch20 can reportedly restore damaged hair's cuticles and reduce the negative effects of chemical pollutants such as PM2.5 and PAHs via its anti-particle-adhesion effect.

Jojoba Desert has also addressed scalp wellness with its JD Phyto-Or 1%, which features jojoba oil and concentrated phytoene. The technology reportedly imparts a radiant shine to users' hair and balances scalp sebum levels.

On the microbiome front, BASF's Scalposine comprises a biomimetic amino acid, sarcosine, that reportedly rebalances and resets the scalp microbiome while reducing scalp oiliness.

Tested in a rinse-off scalp mask format, Scalposine reduced scalp oiliness and the accumulation of dirt, oil and product build-up on the scalp while supporting a balanced microbiome when used for at least 28 days. Usage reportedly increased needed shampooing intervals.

Elsewhere, Lubrizol's Fensebiome heptapeptide is designed to provide barrier protection to the skin and scalp while also increasing the beneficial scalp microbiota, which can decrease with age.

The result, per Lubrizol, is a "rejuvenated and healthier scalp."

The ingredient reportedly soothed the sensitive scalps of men and women during two panel tests. In both groups, scalps were perceived as more hydrated and less itchy.

In vitro testing reportedly showed a reduction of kallicrein-5 and PAR-2 activation, which signaled relief of inflammatory and itching skin and scalp conditions.

The heptapeptide can be incorporated into scalp formulations designed to reduce sensitivity, prevent dehydration and rejuvenate the scalp.



For brands seeking to break into rosemary-based hair care, private label beauty manufacturer Lady Burd has developed a revitalizing Rosemary Mint Shampoo.

On the brand front, The Hair Lab has launched a trio of moisturizing shampoo formulas customized to scalp types—dry, balanced or oil-prone. The formulations can be "supercharged" with the addition of as many as three of the 12 Hair Lab doses the brand offers. Dose options include formulations to address UV exposure, curls, breakage, frizz and more.

The shampoos themselves, which retail at Walmart, include squalene, glycerin and cocamidopropyl betaine for dry scalps; rice water, hemi-squalane and cocamidopropyl betaine for balanced scalps; and apple cider vinegar, glycerin and cocamidopropyl betaine for oily scalps. The brand's three conditioners are similarly divided among scalp types.

INSIGHTS INTO ACTION: New Hair Care Ingredients, Concept Formulas & Packaging for Brands

Capturing the Rosemary Hair Care Trend

Google's new Holiday 100 for 2023, comprising gift ideas "based on trending searches throughout the

Courtesy of Lady Burd

year," prominently featured Mielle's Rosemary Mint Hair Strengthening Oil. Since its launch, the SKU has been single-handedly responsible for a massive spike in online searches regarding rosemary and hair care; no wonder it soon became the top hair oil in the U.S. market (per the brand).

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

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

Pine-inspired Hair Hydration

Mibelle's new PinoPlex counteracts physical, chemical and other hair stresses by imparting osmolytes to the hair to reset the water balance. The technology thereby smooths the hair cuticles, which often protrude following stress and leak much-needed hydration. The result is better moisturized hair powered by strong water bonds. Derived from ethically hand-harvested Scots pine cones from France, PinoPlex is ideal for split end menders, leave-in conditioning repair creams, moisture masks, soothing mists for hair shine, moisturizing hair smoothers, and hydrating overnight leave-in conditioners.

Mild Conditioning & Color Retention

Croda's mild Crodamine SC conditioner (INCI: hydroxyethyl diethylenetriamine dioleamide/palmitamide) reportedly boosts hydrophobicity, static control and color retention in both leave-in and rinse-off products. Featuring 90% biobased and natural content, the technology is based on fatty acids typically found in hair.



Lumson's Slim range is characterized by "clean, timeless lines," per the company.



Lumson's Verona range is characterized by a minimalist design with clean lines.



Mibelle Biochemistry's new PinoPlex counteracts physical, chemical and other hair stresses by imparting osmolytes to the hair to reset the water balance.



Lumson's Round range includes muted colors, a soft-touch finish and rounded profiles.

L to R courtesy of Mibelle Biochemistry; Lumson

Turnkey Hair Care Packaging

Lumson's new Slim, Verona and Round packaging ranges represent an expansion into the hair care space. The packaging is part of a turnkey service comprising bottles, dispensing systems, decoration capabilities and accessories.

Across the three ranges are 19 packaging options in various sizes, offering solutions for products such as serums, masks and other types of formulations.

The Slim range is characterized by "clean, timeless lines," per the company, spanning nine bottles with capacities ranging from 30 ml to 400 ml. Material options include glass, PET, PE and more.

Verona is characterized by a minimalist design with clean lines and sizes ranging from 50 ml to 200 ml. The range includes PETG bottles that can be paired with traditional and precision dispensing systems for professional applications focused on the scalp.

Finally, the Round range includes muted colors, a soft-touch finish and rounded profiles.

Round designs are available in glass and PE in capacities ranging from 50 ml to 250 ml. The Round bottles are ideal for products for the hair and/or scalp, per Lumson.

Tube x Applicator Solutions for Hair & Scalp Wellness

Cosmogen's Squeeze'n range pairs applicators with tubes. Designed for hair care, as well as body care applications, the range features an on/off rotary system for clean dispensation (on) and application (off). Pads and applicators comprise soft, hygienic material, per the company, while the tube and cap are offered in recycled and recyclable material.

The Maxi Squeeze'n for body and hair care can have a filling capacity between 100 ml and 250 ml. Maxi Squeeze'n Detox features a bristled applicator for shampoos and scrubs and is designed to increase blood flow to the scalp while promoting healthier hair follicles. Users can keep the applicator after the tube is emptied.



Drybar leveraged Cosmogen's Maxi Squeeze'n Detox for its Crown Tonic launch, a pre-shampoo and scalp-balancing cleanser.

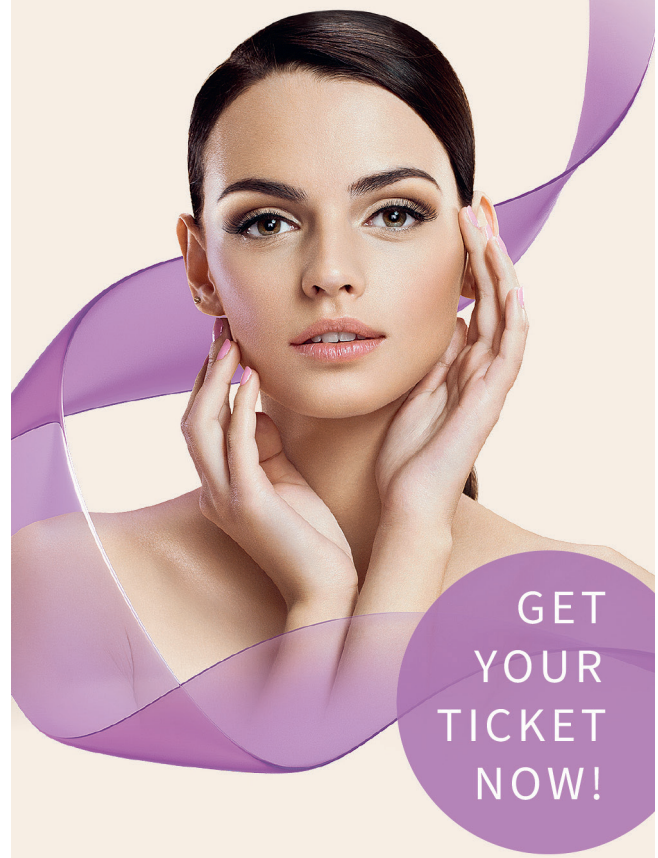
Drybar leveraged the Maxi Squeeze'n Detox for its Crown Tonic launch, a pre-shampoo and scalp-balancing cleanser. The applicator's pad with soft spikes was reportedly designed to gently treat the scalp. ■

Courtesy of Drybar

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From calming scents to invigorating fragrance notes, mood- and emotion-forward design is winning over beauty's youngest shoppers.

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FRAGRANCE'S MOODY MOMENT

Gen Z and Generation Alpha view scent through an emotional well-being lens; here's what that means for the category.

Generation Alpha and Gen Z shoppers love fragrance, but in ways that distinguish them from previous generations of shoppers. For these buyers, mood is everything.

Understanding Gen Z and Gen Alpha Fragrance Buyers

"Consumers aged 13 through 26 rank highest when it comes to heavy fragrance usage[a]," Circana's Larissa Jensen told the *National Post* in December 2023. "Gen Z shoppers are also most likely to buy a scent for themselves several times a year. Eighty percent of fragrance users say that scent is critical for enhancing or lifting their moods."

The focus on mood should be unsurprising to those who have followed the emotional well-being of Gen Z consumers.

According to pre-pandemic American Psychiatric Association data[b], 91% of Gen Z survey participants had "experienced at least one physical or emotional symptom because of stress, such as feeling depressed or sad (58%), or lacking interest, motivation or energy (55%).

Because younger consumers are mood-focused when it comes to scent, their shopping patterns have shifted.

A September 2023 report from DTC commerce specialist ESW noted[c], "Unlike previous generations, who often wore a signature scent consistently, Gen Z is more likely to choose fragrances based on how they feel on a particular day. This has led to a surge in demand for smaller, more affordable fragrances that can be easily mixed and matched to express different moods and emotions."

For these reasons and more, Gen Z is leading the recent increase in fragrance usage among U.S. consumers, per a 2023 report[d] from Circana. In fact, in the last year Gen Z fragrance usage increased 5% to 83%. Many users aged 13-16 wear scents at least three times a week[e], dwarfing the engagement of millennials.

In addition, Gen Z shoppers are also most likely to buy a scent for

[a]https://nationalpost.com/feature/gen-zs-love-luxury-perfume-in-bad-times

[b]www.apa.org/monitor/2019/01/gen-z

[c]https://esw.com/blog/how-gen-z-is-disrupting-the-fragrance-sector

[d]www.circana.com/intelligence/category/press-releases/

[e]www.gcimagazine.com/consumers-markets/news/22874399/gen-z-is-the-key-to-fragrance-growth



Increasingly, fragrances serve as accessories to wearers' moods.

Image by Lightfield Studios at Adobe Stock

themselves several times a year, compared to other age cohorts, though all generations seek to treat themselves to fragrances.

Younger Shoppers Lean into Prestige Fragrance

This has boosted the category across the board. Fragrance was a top performer in U.S. prestige beauty as measured by dollar sales[f] in 2023, per Circana; prestige fragrance grew about 12% in 2023, compared to about 4% in mass.

At the product level, NielsenIQ data revealed that top prestige sellers included eau de parfums and fragrance juice sets, signaling an emphasis on value.

Circana data echoes these findings. Top growth prestige categories identified by the firm in 2023 included higher fragrance concentrations such as eau de parfums and parfums, which gained three share points.

The data is undeniable.

A March 2024 research note from Circana fragrance category analyst Jacquelyn Wenskus noted, "Designer and artisanal fragrance brands account for over 80% of the sales revenue within the U.S. prestige fragrance market and boasted double-digit growth rates in 2023 … Similarly, 7-in-10 fragrance consumers are willing to pay more for higher concentrations, which are stronger, longer lasting and higher priced."

Value Boosting Fragrance Dupes, Private Label, Body Sprays & More

Value is also critical.

Per Circana, gift sets were the fastest-growing segment of the fragrance market overall in 2023.

At the same time, unit sales for mini women's fragrances (less than 1 oz) grew at five times the rate of other sizes in 2023.

Simultaneously, the size of the body spray market nearly tripled.

"Although consumers are trading up to pricier fragrance products, they are simultaneously spending more on lower-priced alternatives sold in prestige retailers that offer similar benefits," Wenskus noted in her report. "This polarization is evident in the growth of prestige body sprays … The average price of body spray is under $25, which is a fraction of the cost of a traditional fragrance bottle."

Wenskus added that a focus on value drove 94% growth in private label mass brand sales in scent, as well as a boom in fragrance dupes.

Despite shoppers' focus on value, only 23% of fragrance purchasers are influenced by discounts, per Circana. And nearly 80% are willing to pay more for a scent they like; about the same portion will pay a premium for mood-boosting scents.

Sensing a pattern?



Top growth prestige categories include higher fragrance concentrations such as eau de parfums and parfums, which gained three share points in 2023.

Fragrance Engagement is High

Growth is likely to continue. Spate[g] data shows that fragrance is the fastest growing beauty category in terms of online search volume, jumping 34% year-over-year.

At the same time, escalating engagement with the category has boosted "perfume Tok" views on TikTok, totaling 7.8 billion.

This latter statistic is particularly notable because TikTok is the second-most popular platform for fragrance content across all shopper demographics, though driven primarily by Gen Z and millennials. Men in particular are increasingly influenced by the platform.

In a 2023 report, Circana's Jensen noted, "For success, fragrance brands and manufacturers must capture the hearts and wallets of Gen Z and millennials, who are the most

[f]www.gcimagazine.com/consumers-markets/article/22889772/beauty-20232026-category-blur-continued-growth

[g]www.spate.nyc/beauty

Image by Cultura Creative at Adobe Stock

important generations when it comes to use and interest in the category. Since the peak pandemic period, the fragrance market continues to bask in the sweet smell of sales success because of its highly personal and emotive nature."

Emotion-forward Fragrance

The drive toward more emotionally driven fragrances has shaped recent launches. For instance Addison Rae's 2021 AF Collection of alcohol-free, water-based fragrances featured mood-enhancing scent notes designed to trigger an emotional reaction.

Happy AF was designed to be a daily dose of euphoric joy for all-day positive vibes, featuring a fruity floral scent with notes of pink lychee, red grapefruit, peony, violet leaves, agave nectar, rose and crystallized musk.

The energizing Hyped AF, meanwhile, featured a citrus musk scent with notes of mandarin, blood orange, pomelo, nectarine blossom, white woods and clean musk.

Finally, the calming Chill AF featured notes of pear blossom, apple, red lemongrass, chamomile tea, lily of the valley, sandalwood and milky musk.

Notably, the brand was launched to be shoppable on TikTok.

More recently, in March 2024, wellness brand Brown Girl Jane, which pivoted to fragrance in April 2023, launched into Sephora. The brand—the first Black-woman-owned scent label at the retailer—describes itself as "functional fine fragrance" and is designed to "promote distinct mood responses."



Addison Rae's 2021 AF Collection of alcohol-free, water-based fragrances featured mood-enhancing scent notes designed to trigger an emotional reaction.

Moodeaux, another Black-owned brand, has also made a splash with genderless emotion-forward fragrances. The brand is designed to help consumers "accessorize" their moods.

In 2023, *Global Cosmetic Industry*'s sister brand, *Perfumer & Flavorist+*, interviewed Moodeaux founder Brianna Arps about its PunkStar launch.



The size of the body spray market recently nearly tripled.

"PunkStar channels big 'main character energy' while carrying out our mission to empower scent-crazed beauty fanatics as they accessorize their mood and practice the best form of self-care: self-expression," Arps noted.

At the supplier level, Givaudan's MoodScentz platform, first announced in 2020, was launched to guide perfumers and creative teams in crafting mood-enhancing fragrances to evoke positive emotions.

Driven by neuroscience principles, the platform comprises a set of fragrance creation guidelines based on combinations of ingredients with targeted mood benefits such as happiness, invigoration or relaxation.

In this way the platform helps fragrance designers better understand the underlying mechanisms that take place in the human brain in the presence of odors, per Givaudan.

Two years after its launch, Givaudan unveiled MoodScentz+, adding a new neurobiology measurement capability based on data mining to the platform. The upgraded system was designed to offer perfumers and oral care flavorists the ability to combine ingredients with specific scientific and consumer-proven mood benefits to create compositions that positively enhance emotions.

MoodScentz+ covered a range of positive moods, including "Relax &

From top: courtesy of Addison Rae Fragrances; image by Syda Productions at Adobe Stock

MIXER & PACK IS BRINGING ITS PRIVATE LABEL PERFUME MANUFACTURING SERVICES TO THE HOT US MARKET

To support its growth efficiently, Mixer & Pack implemented an enterprise resource system, Dynamics 365 Cloud Finance & Supply Chain Management.

Spain-based fragrance private label manufacturer Mixer & Pack S.L. has extended its internationalization from Europe to the booming U.S. market.

The move comes amid a scent boom in the United States. U.S. prestige fragrance grew about 12% in 2023, compared to about 4% in mass, per Circana.

Top growth categories included higher fragrance concentrations such as eau de parfums and parfums, which gained three share points in 2023.

Preparing for Growth

In February, the company announced that it had received FDA registration under MoCRA (Modernization of Cosmetic Regulation Act), which means that its facilities are now registered to operate in the United States.

To support its growth efficiently, Mixer & Pack has implemented an enterprise resource system, Dynamics 365 Cloud Finance & Supply Chain Management.

The system is said to bring improvements, optimization, efficiency and innovation to all company departments.

The company's new capabilities will support its 30 years of experience in the design, development and manufacture of perfumes for fashion brands, multinational beauty companies and more.

During the recent Cosmoprof Bologna event, Fernando Hernández, who is responsible for Mixer & Pack's commercial department, noted, "We are delighted with the expert leaders in world perfumery and perfume lovers to have the opportunity of getting to know closely the quality that distinguishes Mixer & Pack as a leader in the industry." ■



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To support its growth efficiently, Mixer & Pack has implemented an enterprise resource system, Dynamics 365 Cloud Finance & Supply Chain Management.

Courtesy of Mixer & Pack



Moodeaux has made a splash with genderless emotion-forward fragrances. The brand is designed to help consumers "accessorize" their moods.



Mood was front and center in Love Beauty and Planet's new range of vegan body washes, featuring "mood-transforming scents" that were reportedly "biometrically tested through a brain-mapping technology that matches each fragrance with lifestyle activities in a similar mood space," per the brand.

Courtesy of Moodeaux; Love Beauty and Planet

Unwind," "Invigorate & Recharge" and "Happy & Blissful."

Just as Givaudan pushed mood-focused compositions into oral care, Soft & Dri has also pushed emotion-forward sensory compositions into a functional category: deodorant.

Soft & Dri's mood-inspired fragrances include Blissful Freesia, featuring notes of grapefruit and mango, exotic florals, and freesia and cedarwood, which are intended to spark joy and bliss.

Its Zen Cucumber fragrance pairs cucumber notes with those of orange, melon, musk and amber for a calming experience. Meanwhile, the brand's classic Sparkling Citrus scent was revived with floral notes, musk and cedarwood to inspire a bright, happy mood.

Mood was also front and center in Love Beauty and Planet's new range of vegan body washes, featuring "mood-transforming scents" that were reportedly "biometrically tested through a brain-mapping technology that matches each fragrance with lifestyle activities in a similar mood space," per the brand.

The range's scents included Vibe, featuring notes of mimosa flower, rose and jasmine, rhubarb, and blackcurrant, which are intended to evoke the experience of hearing one's favorite song. The self-explanatory Calm, meanwhile, features notes of water lily and eucalyptus, while the nature-evoking Zen features notes of eucalyptus and mint, jasmine water, and sage.

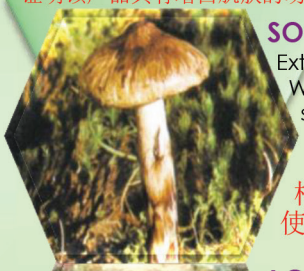
"With the introduction of our new vegan body washes, your shower can be a mood-transforming experience," said Greg Ross, chief operating officer of Unilever Personal Care, North America. "We're bringing the power of baths to the shower so everyone can feel like their best selves regardless of time or space."

As these launches show, mood- and emotion-centric scent design is category-agnostic. Brands will be best served by getting in their feelings. ■

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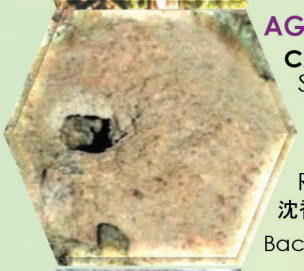
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我们在美国的实验室经过广泛研究后，在皮肤护理领域取得重大突破。我们已发现松茸蘑菇内所含的酶是有效的天然皮肤增白剂。经常使用，松茸酶精会渗入皮肤，使肤色更加白净，还能有效减少皱纹。以上效果经过临床证实。



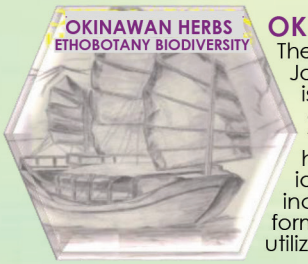
AGARWOOD RESINS מעלה (אשאן מעלה) (קטורת)

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



AGARWOOD RESINS מעלה (אשאן מעלה) (קטורת)

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



OKINAWAN HERBS ETHOBOTANY BIODIVERSITY

The Okinawa area is located at the southern region of Japan and consists of more than 100 islands. Okinawa is the only region in Japan that has a subtropical climate, allowing the growth and cultivation of both tropical and temperate plants. Campo Okinawan herb extracts are extensively researched and identified to demonstrate its bioactive potential for inclusion into modern cosmetics and toiletries formulations. The inhabitants of Okinawa have traditionally utilized these plants as medicinal herbs and food.



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The Botanical Preservative

CAMPO PLANTSERVATIVE™ is a series of ready to use liquids of Natural Plant obtained Green Natural Colorless Clear, Odorless Preservatives contains no parabens, from Honeysuckle Flower Buds (Lonicera Caprifolium & Lonicera Japonica).

MIC and Challenge Tests are at low dosage as 0.125% with **"No Preservative"** and **"Preservative Free"** Claim.

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植物防腐剂 CAMPO PLANTSERVATIVE™ 是使用天然绿 色植物的液体系列，无色透明，无味的防腐剂，不含对羟基苯甲酸酯，提取自金银花（忍冬）芽。

最小抑菌浓度和筛查试验在低用量 0.125%下进行，认定"无防腐剂"或"不含防腐剂"。

TSCA 列出 | FEMA GRAS 列出 | DHHS 列出

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

Lonicera Japonica Plant



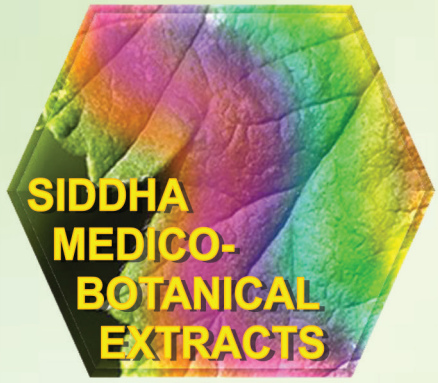
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CAMPO PLANTSERVATIVE WSr

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

CAMPO PLANTSERVATIVE WMr (Jojoba Oil)

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



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天然色剂

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

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

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

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

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

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CAMPO BOTANICALS® Novel Functional Active Cosmetic Ingredients and Raw-Materials
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With 100% High Purity Siddha Medico Botanicals Extracts as Natural Color Ingredients and
With 100% High Purity Campo Natural Botanical Additives to Prolong Hair Colors Effects,
For Botanical Permanent, For Botanical Demi-Permanent, For Botanical Semi-Permanent, For BotanicalTemporary

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Since December 2023, online searches for "whole body deodorant" have exploded, dwarfing traffic recorded over the last 20 years. Why is that?

Image by Krakenimages.com at Adobe Stock

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THE WHOLE-BODY REVOLUTION

Simplicity, multifunctionality, gentleness, value and efficacy are driving exponential growth in launches promising all-over deodorizing benefits across multiple body sites.

Since December 2023, online searches for "whole body deodorant" have exploded, dwarfing traffic recorded over the last 20 years. Why is that?

What's Driving Whole-body Deodorant Growth?

"Consumers have returned to regular product use post-pandemic and the importance of multipurpose products is gaining traction in the category," says Melissa Niebes, CEO of Federal Package. "According to Mintel[a], for example, 19% of category users report using anti-perspirant/deodorants (APDO) on other parts of the body compared to 16% in 2022. Younger consumers—26% aged 18-34—apply to areas other than underarms vs 9% over the age of 55."

Value is also a consideration, Niebes says: "The APDO category also has leaned deeper into fragrance variation, with consumer groups layering more than one scent or using it instead of perfume."

This insight dovetails with a recent Circana analysis (**Page X**) that reported the size of the body spray market nearly tripling in 2023, in part because shoppers have sought out lower-priced alternatives to fine fragrances. This has largely been driven by the average price in that category, which is just $25, far lower than prestige or even some mass scents.

There are other value considerations, however. Niebes explains, "There is also speculation with inflationary pressures—[with] the average product price up 15.7% in 2022—that consumers are dropping add-on products, possibly going to an all-in-one solution."

These all-over products are almost uniformly deodorants, rather than OTC antiperspirants, omitting eccrine-gland-blocking aluminum.

Niebes notes, "So, you may still experience sweating if you are just using a deodorant." That said, "Deodorants contain fragrances to neutralize odors and sweat-absorbing ingredients like powders and starches among other things to rebalance pH levels."

As with underarm deodorants, whole-body products put odor control front-and-center.



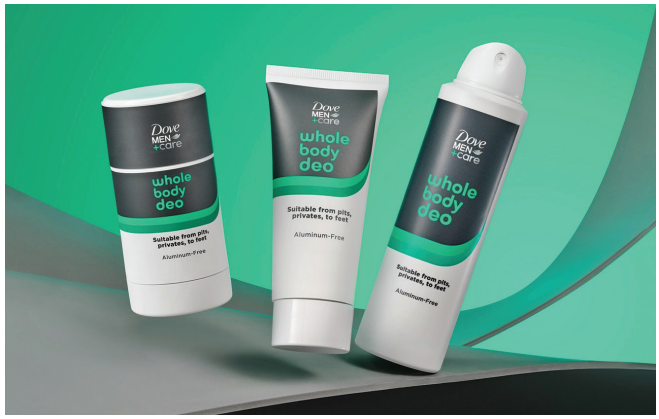
"According to Mintel ... 19% of category users report using anti-perspirant/deodorants (APDO) on other parts of the body compared to 16% in 2022," says Melissa Niebes, CEO of Federal Package. "Younger consumers—26% aged 18-34—apply to areas other than underarms vs 9% over the age of 55."

[a]https://store.mintel.com/report/us-bodycare-and-deodorant-market-report

Image by Lightfield Studios at Adobe Stock



Raw Sugar Living's new Simply Deo stands at the minimalist end of the whole-body spectrum. The single SKU is designed to cover and neutralize odor while enhancing freshness on the chest, under arms, thighs and feet.



Dove Men+Care's Whole Body Deo range is designed to offer relief "from pits, privates to feet."



Kao's Ban has taken a multi-SKU approach to whole-body care.

"Odor control is usually the first claim we get brands asking about, and how much fragrance they can put into a formula," Niebes explains. "The brands we produce for have also been asking about safety for sensitive skin, free from certain ingredients like aluminum or parabens, the inclusion of more natural ingredients like charcoal or essential oils, or ingredients to treat specific skin conditions like eczema. Of course, we get a lot of requests for anti-chafe properties as they are usually being advertised for intimate and sensitive areas as well."

The Latest Whole-body Deodorant Launches

Amid the boom, a wide range of brands have launched whole-body solutions.

Raw Sugar Living's new Simply Deo stands at the minimalist end of the whole-body spectrum. The single SKU is designed to cover and neutralize odor while enhancing freshness on the chest, under arms, thighs and feet.

The formulation conspicuously omits aluminum, which is erroneously thought by some consumers to trap cancer-causing toxins within the body (these in fact are expelled not through sweat glands, but via the kidneys and liver); it also omits baking soda, the alkalinity of which has sometimes been blamed for creating microbiome dysbiosis.

The Eucalyptus + Fresh Mint-scented Simply Deo features odor-growth-controlling magnesium, moisture- and sweat-absorbing arrowroot powder (a stand-in for baking soda); antibacterial, moisturizing and sensory-enhancing coconut oil; and zinc, a stand-in for aluminum.

The deodorant is packaged in biodegradable paper and recycled plastic.

Meanwhile, Dove Men+Care's Whole Body Deo range is designed to offer relief "from pits, privates to feet."

The aluminum-free range—with scent variants like Aloe + Bamboo and Shea + Cedarwood—features vitamin E and other skin-conditioning ingredients and moisture absorbers.

The Whole Body Deo Stick features arrowroot powder and silica to prevent chafing, while the Whole Body Deo Spray features glycerin and odor-fighting zinc neodecanoate. Finally, the Whole Body Deo Cream features sunflower seed oil

From top: courtesy of Raw Sugar Living; Dove; Ban

and glycerin as well as moisture-absorbing corn starch.

Elsewhere, Kao's Ban has taken a multi-SKU approach to whole-body care.

Its new vegan, genderless Total Body and Sweat Collection addresses what the brand calls "problem areas" with four site-specific formulas. Notably, the "skin-first" formulations comprise prebiotics and "skin-loving ingredients" to support the skin barrier, balance the microbiome, and counteract odor and irritation caused by sweat.

Ban's aluminum-free AHA Roll-On Skin Serum Deodorant addresses odor-causing bacteria in the armpits for 48 hours of protection. Aside from its exfoliating, brightening and ingrown hair-reducing namesake ingredient, the formulation features brightening niacinamide and prebiotics for odor control. Scent variants include Unscented, Citrus & Jasmine, and Amber & Cedarwood.

Meanwhile, the brand's Thigh & Body Rub Remedy Anti-Friction Stick features prebiotics, glycerin, tapioca starch, and soothing aloe and calendula extract, while the Underboob Sweat Shield Stay Dry Lotion features the same key ingredients.

INSIGHTS INTO ACTION: New Deodorant Packaging & Ingredients

Gerresheimer recently developed sustainable packaging for a water-free deodorant cream launch from 4peoplewhocare. The supplier paired its recyclable Gx Amsterdam glass jar (featuring at least 30% post-consumer recycled [PCR] glass) with a cap constructed from its 100% plant-based Forewood material, which comprises wood fibers and biopolymers. Forewood is reportedly certified according to PEFC and ISSC Plus standards.



Gerresheimer recently developed sustainable packaging for a water-free deodorant cream launch from 4peoplewhocare.

Courtesy of Gerresheimer

The result was presented at the Vivaness trade show in Nuremberg, Germany in February 2024. The SKUs launched online and in select stores in April 2024.

"We are proud to be part of this pioneering project with 4peoplewhocare," said Veronika Brucks, senior marketing manager, Gerresheimer Moulded Glass Europe. "The combination of glass containers and 100% bio-based closures made from Forewood material are a perfect match with the sustainability ideas behind this new cosmetic product."

Marc Seipel, co-founder and managing director at 4peoplewhocare, added, "We and our customers are very much looking forward to the first organic cosmetic deodorant in innovative, sustainable packaging from our partners at Gerresheimer. Such high-quality ingredients deserve this packaging highlight and the value combined with protection and design."

Elsewhere, Silab's latest active ingredient, Deolya (INCI: *Spiraea ulmaria* L.), is a natural deodorant combining hygiene and skin care in relieving irritation from the underarms.

The active strengthens barrier function and reduces inflammation, significantly decreasing the frequency of unpleasant underarm sensations or appearance after shaving or epilation (after 28 days of use), per the company.

Deolya reportedly limits the excessive abundance of *S. hominis* in the axillary cutaneous microbiota and targets the enzymatic activity of this bacterial species.

To back up these claims, company developed a modeling study that demonstrated quantitative (increased abundance) and qualitative modifications (increased enzymatic activity) of *S. hominis* strains sampled from the axillary microbiota of malodorous volunteers subjected to physical activity, compared to a non-odorous panel.

Separately, a panel featuring Caucasian men and women wearing Deoyla during physical activity reportedly revealed that the ingredient reduced perspiration odors by 58% as of the first application.

This deodorant efficacy, assessed by an olfactory evaluation from an expert panel qualified in sensorial measurement, was confirmed at the molecular level by a 76.3% reduction of the malodorous 3M3SH thiol, per Silab. These effects were also observed after seven days of daily use and without having applied the deodorant in the morning before the physical activity session. ■



With hyperpigmentation online searches peaking, consumers are clearly eager for solutions that target the after-effects of acne, eczema, psoriasis and other common conditions.

Image by kokliang1981 at Adobe Stock

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PIGMENTATION 2.0: INGREDIENT TRENDS, MAY 2024

With hyperpigmentation concerns on the rise, ingredient suppliers have launched technologies to address issues related to acne, psoriasis and more.

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

Online searches for "hyperpigmentation" peaked in the last 12 months, per Google Trend data.

Top related concerns included post-inflammatory hyperpigmentation—a condition typically inflicted by flare ups of acne (another top associated keyword), eczema, psoriasis and other conditions—and a close synonym, erythema.

The most searched ingredients related to hyperpigmentation include vitamin C, glycolic acid and vitamin A, while the top associated product terms include cleanser, soap, sunscreen and moisturizer.

The immense interest in unwanted pigmentation issues has spurred a wide range of ingredient technology development.



Melasyl is now available in La Roche Posay's Mela B3 franchise, including MelaB3 serum and MelaB3 SPF30.

Courtesy of La Roche Posay

Pigmentation Innovation

Targeting: Age Spots and Post-acne Marks

In March 2024, L'Oréal launched Melasyl, a molecule designed to address localized pigmentation issues that lead to age spots and post-acne marks.

L'Oréal formulations containing the proprietary ingredient work across all skin tones to address pigmented marks on the skin and improve their appearance, per the company.

The underlying technology was reportedly validated in a number of studies. One randomized controlled clinical study noted[a] that Melasyl, known as 2-mercaptonicotinoyl glycine (2-MNG), "prevents UV-induced skin darkening and delayed tanning in healthy subjects."

The report concluded, "2-MNG inhibited both UV-induced skin pigmentation mechanisms in vivo. The association of 2-MNG with LHA plus MSX showed the highest efficacy on melanin-rich skin with pigmentation induced by UV exposure."

[a]https://onlinelibrary.wiley.com/doi/10.1111/jocd.16200

Another publication[b], "A Bayesian network meta-analysis of 14 molecules inhibiting UV daylight-induced pigmentation," concluded:

The BNMA revealed a rapid and lasting efficacy of 2-MNG 0.5% on the anti-pigmenting and depigmenting phases of the clinical protocol. 2-MNG 0.5% ranked first, with immediate and lasting effect compared to 13 other references. This study is the first allowing comparison between reference anti-pigmenting and depigmenting agents and will help clinicians for proposing the most effective approach for their patients.

Melasyl is now available in La Roche Posay's Mela B3 franchise, including MelaB3 serum and MelaB3 SPF30.

The Mela B3 Dark Spot Serum with Melasyl + Niacinamide reportedly "visibly reduces a range of skin discoloration, including sunspots, age spots, post-acne marks (or post-inflammatory hyperpigmentation), and even the most stubborn dark spots" for all skin tones.

The Mela B3 UV Daily Moisturizer SPF 30 with Melasyl + Niacinamide is designed to simultaneously "protect skin against visible signs of sun damage caused by UVA and UVB exposure" while addressing the appearance of dark spots with Melasyl and 5% niacinamide.

A Green Tea Vitamin C Brightening Alternative

Givaudan Active Beauty's Illuminyl 388 is an augmented green tea polyphenol (EGCG; epigallocatechin gallate) prebiotic skin brightening active with universal efficacy against skin pigmentation for all skin types.

The technology is being positioned as an alternative to brightening technologies such as vitamin C.

Illuminyl 388 reportedly targets multiple skin pigmentation pathways, paired with prebiotic activity to deliver brightening for skin types from Africa, Asia, India and Europe.



Givaudan Active Beauty's Illuminyl 388 is an augmented green tea polyphenol (EGCG; epigallocatechin gallate) prebiotic skin brightening active with universal efficacy against skin pigmentation for all skin types.

The ingredient's sugar moiety reportedly allows it to penetrate deep into the skin via cellular glucose receptors; that moiety also confers on the molecule a prebiotic activity that reportedly stimulates the *in situ* release of a niacin derivative by the skin microflora.

Givaudan has given the new material a B-Biome score of B, signaling that the active works in synergy with the microbiome to preserve the general balance of the skin's microbiota.

The company launched the scoring mechanism in June 2023 to underscore technologies that are microbiome-friendly, scientifically demonstrated, backed by a scientific publication and endorsed by a dermatological expert.

In clinical studies involving more than 200 individuals with skin tones representative of African, Asian, Indian and Caucasian backgrounds, Illuminyl 388 was reportedly found to enhance skin tone, luminosity and radiance within two weeks.

Within one month, Illuminyl 388 reduced pigmentation spots, per the company.

[b]https://onlinelibrary.wiley.com/doi/10.1111/jdv.19910

Image by sonyakamoz at Adobe Stock

In addition, it enhanced homogeneity of skin tone, including age spots.

In the April 2024 edition of *Global Cosmetic Industry*, Fabrice Lefèvre, marketing and innovation director, Givaudan Active Beauty, said of the new technology:

Illuminyl 388 is an augmented green tea polyphenol, based on cell free glycosylation.

This biotech improved EGCG molecule drastically improves the molecular stability, solubility and biodisponibility.

Targeting all the main stages of the pigmentation process (melanogenesis, tyrosinase activity, melanin transfer…), together with a powerful antioxidant activity, this new active efficiently brightens the skin tone.

This action is innovatively reinforced by a synergistic prebiotic activity, favoring the growth of specific bacteria in the skin microbiome, releasing a powerful niacin-derivative.

Ocean-derived Brightening

Oceanium's Ocean Actives Fucoidan is a fucose-rich sulphated polysaccharide, high-purity marine bioactive ingredient derived from sustainably farmed seaweed which restores, calms and protects all skin types.

Key benefits of the ingredient include immediate and long-term moisturization, pigment reduction and brightening, a reduction in redness, and enhancement of the skin barrier, per the company.

Ocean Actives Fucoidan is water-soluble and non-odorous, allowing for application in a range of delivery systems and formats to promote topical skin vitality activity. It is ideal for use in water-based gels, serums, lotions and creams, face and body moisturizers, overnight treatments, face masks, and after-shave creams and lotions, according to the company.

Multi-target Tech: Hyperpigmentation, Facial Lines & Sebum Overproduction

Ashland's Perfectyl biofunctional (INCI: *Chamomilla recutita* (matricaria) flower/leaf extract) is an organic Oregonian chamomile extract that relaxes facial lines without the intervention of injections.

The material, rich in GABA amino acid (sometimes called "slow Botox") and flower acids, is in line with increased interest in cosmetic procedures and non-invasive alternatives.

The extract was developed using Zeta Fraction technology, which "gently separates live plants or algae into

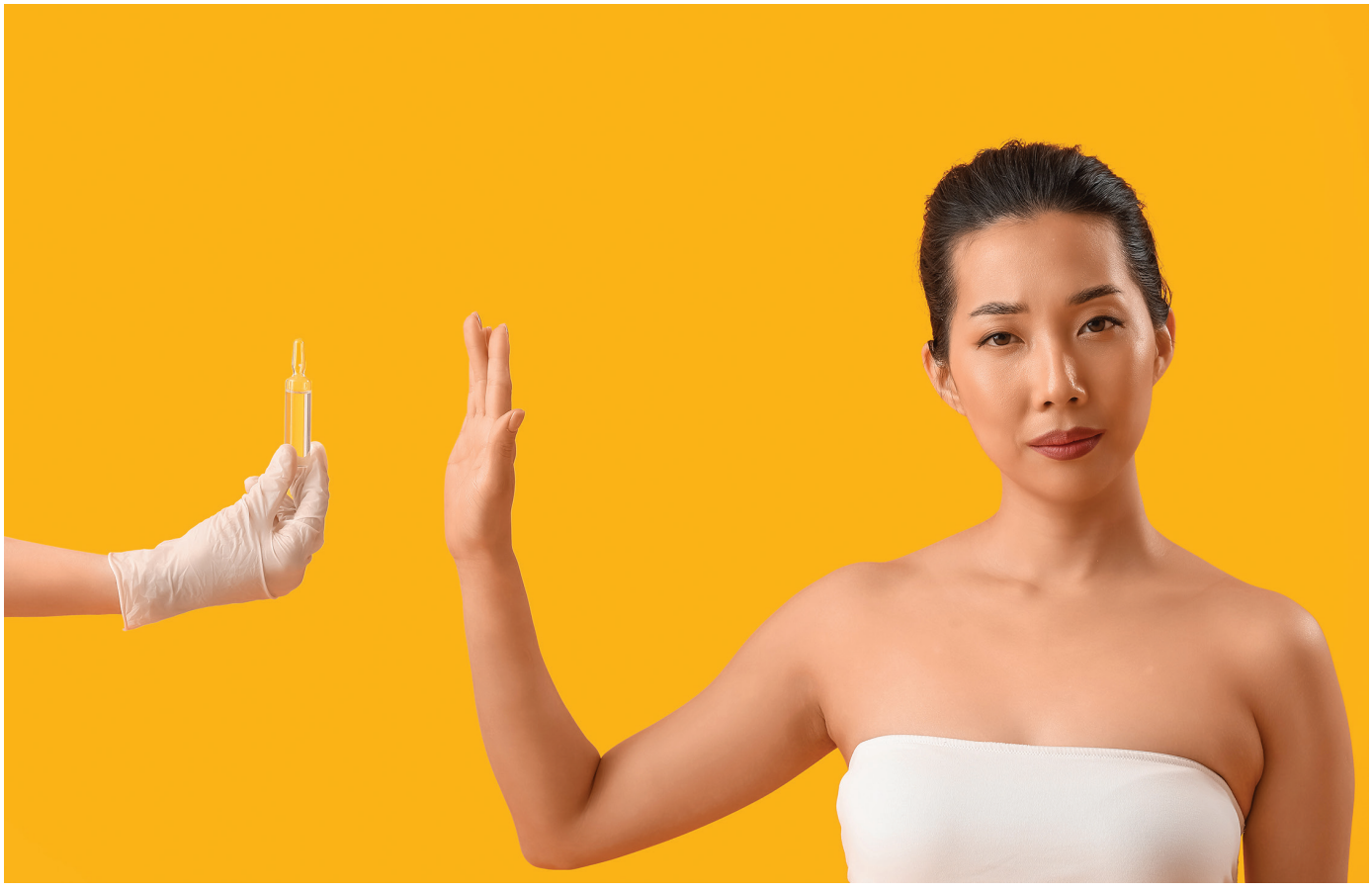


Image by Pixel-Shot at Adobe Stock

Ashland's Perfectyl biofunctional is an organic Oregonian chamomile extract that relaxes facial lines without the intervention of injections; it also minimizes post-inflammatory hyperpigmentation

various bioactive components," per the supplier.

Its functionality was reportedly "predicted" by artificial intelligence; per Ashland, Perfectyl acts on the GABA pathway through GABAA expression ex vivo, resulting in the relaxing of facial lines and minimizing post-inflammatory hyperpigmentation and sebum overproduction associated with environmental and lifestyle stressors.

The results can reportedly be achieved across three skin ethnicities and four phototypes, rendering the technology ideal for inclusive beauty solutions offering perfecting and anti-aging claims.

"The younger generation of women are increasingly using non-surgical aesthetic procedures to get flawless skin, and this trend is driven by social media with billions of views," said Justine Cotton, global marketing, biofunctionals, Ashland. "Inspired by these new aesthetic practices used by Gen Z and millennials to achieve a perfect skin, Ashland has developed Perfectyl to help smooth fine lines, refine enlarged pores, and clarify imperfections and uneven skin, specifically pigment spots."

New Ingredient Highlights

Beyond brightening and pigmentation solutions, a wide range of suppliers have unveiled new actives and functional ingredients ahead of the in-cosmetics Global and Suppliers' Day shows in Paris and New York, respectively. Here, we round up some of the latest highlights.

Solving Vitamin C Stability with Waterless Tech

TaikiUSA's new waterless Boshi Beauty Vitamin C Nano Drop Antioxidant Power technology entraps vitamin C within numerous layers of nanofibers, thereby minimizing degradation and maximizing antioxidant activity.

By solving vitamin C's notorious stability issues, Boshi Nano Drops exhibit antioxidant activity that is reportedly 4x more powerful than a traditional vitamin C serum, according to initial DPPH assay results.

According to the company, waterless Boshi Nano Drops are also able to stabilize other typically unstable antioxidants, creating new opportunities for brands to deliver enhanced efficacy.

The drops can be developed in customizable formulas, shapes and packaging, per TaikiUSA.

A Sun-mimicking Glow Booster

Givaudan Active Beauty's Neuroglow active is designed to mimic the "positive effects of the sun," thereby imparting a healthy glow and good mood.

The launch is in line with current trends in beauty brand and ingredient innovation that foregrounds holistic well-being.

As Mintel noted in its 2024 trend report[c], "The next chapter of wellness will be mind-body beauty, where mental well-being and physical appearance are interconnected."

Givaudan's new technology comprises a green fractionation of *Persicaria tinctoria*, often called Chinese indigo, which is sourced in Provence, France.

Neuroglow reportedly boosts melanin production by 126%, mimicking the aesthetic effects of sun exposure. This melanin increase is said to prepare the skin for sun exposure, allowing for a "faster, healthier, more natural and better protected tan," per Givaudan.

A clinical trial cited by the company reportedly demonstrated a notable

[c]https://gcimagazine.texterity.com/gcimagazine/library/item/november_2023/4145335/



TaikiUSA's new waterless Bōshi Beauty Vitamin C Nano Drop Antioxidant Power technology entraps vitamin C within numerous layers of nanofibers, thereby minimizing degradation and maximizing antioxidant activity.

Courtesy of TaikiUSA

phototype shift in 76% of participants in 7 days, shifting from phototype II to phototype III; 40% of these shifted to a darker phototype, IV, compared to 0% in the placebo group.

The technology is said to increase the release of beta-endorphins by 43%, vitamin D by 345% and oxytocin by 229%, thereby imparting a sense of well-being, per Givaudan.

Non-irritating Anti-ager

Grant Industries' encapsulated Granactive Retinoid Pro+ delivers anti-aging and anti-acne efficacy as well as antioxidant benefits with low irritation. The concentrated anhydrous powder comprises hydroxypinacolone retinoate, a highly bioavailable vitamin A derivative, encapsulated and stabilized in gamma-cyclodextrin with alpha-glucosylrutin.

In applications at levels of 2-6%, the 98% natural (per ISO 16128) technology boosts the skin's biological processes to engender anti-aging benefits, including a reduction in oxidative stress and photoaging. Meanwhile, the technology's encapsulation allows it to function in powders and water-based gels.

A New Product Defense Tool

Symrise's new biodegradable Savelite HB multifunctional hydroxypropolyester defends against formulation oxidation and microorganisms while boosting moisturization.

The antimicrobial technology can be applied to any cosmetic products targeting normal to sensitive skin, per Symrise.

Savelite HB, which is based on propanediol and benzoic acid molecules, is a clear, colorless and odorless liquid that is cold-processable, thereby reportedly saving time and energy during production.

According to Symrise, in vivo corneometer testing showed a moisturization increase of 10.9% after two weeks of use of the ingredient. At the same time, the technology is safe for the skin microbiome. Furthermore, it helps stabilize emulsions by reducing oil droplet size.



Lucas Meyer Cosmetics' Corneopeptyl biomimetic peptide spurs the natural barrier function of both older and younger skin against external aggressors for a simultaneously anti- and pre-aging effect.

New Solutions for Mature Skin

Future-proofing Mature & Youthful Skin

Lucas Meyer Cosmetics' Corneopeptyl biomimetic peptide spurs the natural barrier function of both older and younger skin against external aggressors for a simultaneously anti- and pre-aging effect.

Obtained via a green chemistry-based process, the technology biomimics the late cornified envelope 6A (LCE6A) protein, which supports the mechanical resistance of corneocytes in the stratum corneum.

In this way, Corneopeptyl acts on the skin's surface to strengthen the corneocyte envelope and, as a result, its natural barrier protection.

The LCE6A protein was reportedly discovered by Lucas Meyer Cosmetics in collaboration with the Infinity Institute. Like the protein, Corneopeptyl strengthens the corneocyte envelope, resulting in a more resilient epidermal barrier with improved skin barrier function.

This results in diminished skin permeability and water loss, which has implications for the appearance of wrinkles, skin roughness, tonicity and hydration.

Lucas Meyer Cosmetics' testing reportedly underscores the technology's efficacy for both younger and older skin.

Among younger test panelists, Corneopeptyl reduced the appearance of wrinkles and fine lines in 14 days. It also reportedly boosted skin hydration and tonicity in 28 days.

Among older test panelists, the ingredient reduced the appearance of wrinkles and fine lines in 14 days and improved skin hydration, tonicity and smoothness in 28 days.

A range of clinical studies cited by the company reportedly showed that Corneopeptyl can rebuild the skin barrier in 7 days by reducing

Image by deniskomarov at Adobe Stock

skin penetration, water loss and inflammation.

Furthermore, an AI- and algorithm-powered test reportedly "showed real-life results from volunteers with once-per-day application for 28 days: the skin looks 2 years younger and, in some instances, up to 4 years."

Combatting Oiliness in Mature Skin

Ultra Chemical's Bicobiome (INCI: water (aqua) (and) phosphatidylcholine (and) niacinamide (and) *Lactobacillus* ferment (and) salicylic acid) is a multi-active complex designed to address common issues associated with excessive sebum production, such as inflammation and microbiome dysbiosis.

The technology is composed of a multi-component system that delivers three actives to the skin layer, including:

- niacinamide to the follicle to help regulate sebum production and reduce inflammation;
- salicylic acid to the stratum corneum surface to help promote a mild desquamation, reduce lesions of problematic skin, and improve skin texture and soften wrinkles;
- and *Lactobacillus* ferment to the first layers of the skin to favor commensal microbes.

Per Ultra Chemical, the complex is clinically proven to combat oiliness in mature skin and improve scalp health for those with an oily scalp prone to dandruff.

Beauty Alternatives

Heavy Silicone Alternative

Seppic recently published data on Emogreen HP 40 (INCI: C15-19 alkane, hydrogenated polyfarnesene), an alternative to heavy silicones, particularly for hair care.

The new tests reportedly demonstrated its benefits on hair shine and color retention. Comparative results to silicones for the skin care market were also demonstrated.



CycloRetin's heterophyllin B molecule is a cyclic peptide that enhances skin matrix production, per Clariant, thereby improving collagen and reducing the signs of aging.

According to Seppic, Emogreen HP40, applied undiluted to dry curly hair, showed comparable performance in terms of shine to phenyl trimethicone, a reference silicone on this claim. The ingredient also helped prevent color fade due to its film-forming properties.

In skin care, the ingredient provided a perceptible feel and a better adaptation to the skin's relief than silicones, per the company. In an emulsion, it demonstrated improved spreading and absorption of the emulsion's oil droplets on the skin. As a result, it formed a flexible, even and full-coverage film.

Ginseng-derived Retinol Alternative

Clariant's new CycloRetin natural skin care active, which debuted at in-cosmetics Global 2024 in Paris, is a prince ginseng-derived material that generates benefits similar to—but gentler than—conventional retinol.

The technology can also be viewed as a comparably efficacious alternative to bakuchiol, a common natural retinol alternative.

CycloRetin's heterophyllin B molecule is a cyclic peptide that enhances skin matrix production, per Clariant, thereby improving collagen and reducing the signs of aging.

The technology is soluble in water, with efficacy at even low concentrations.

Julie Droux, global technical marketing manager for actives and natural origins, explains, "While exploring the benefits of cyclic peptides in our lab we discovered prince ginseng's outstanding potential to restart the skin matrix production cycle. Highly effective even at low concentrations, peptides play a crucial role in supporting youthful skin appearance."

A Botanical Retinol Alternative

Grant Industries now offers Bakuchiol Ester BCR, which was developed in partnership with Bio Component Research, a botanical extract specialist. The new retinol alternative is reportedly backed by clinical data, offering effective plant-based anti-aging benefits.

Courtesy of Clariant

Algae-derived Hyaluronic Acid Alternative

Sun Chemical's moisturizing and anti-pollution Sacranex active is derived from the rare *Aphanothece sacrum* blue-green algae, otherwise known as Suizenji nori, which is cultivated on a large scale indoors.

The technology, available in "B" and "F" variants, reportedly reduces the appearance of redness, fine lines and wrinkles. It also marks the company's expansion beyond color cosmetics to skin care.

According to a 2022 publication, "The Pharmacological Potential of Cyanobacteria," *Aphanothece sacrum* comprises a sulfated polysaccharide, sacran, which has a number of benefits for the skin, including anti-allergenic and anti-inflammatory properties, as well as protective film-forming capabilities. The publication goes further, suggesting sacran as a possible alternative to hyaluronic acid.

Sacranex was developed as part of a joint venture with DIC Corporation and biotech specialist Green Science Materials, Inc., first initiated in August 2022.

Notably, the indoor mass cultivation of the algae reportedly supports conservation of the Kogane River (Asakura City, Fukuoka Prefecture, Japan), which is said to be the only natural habitat for Suizenji nori.

"Sun Chemical has always been the expert in bringing vibrant colors to life," said Ed Webb, global director of cosmetics, Sun Chemical. "Now we're extending our expertise beyond pigments to introduce an active ingredient derived from Suizenji nori algae. Just as we've mastered the art of color in beauty, we're bringing skin care solutions that enhance natural formulations from the inside out."

Seed Powder Exfoliant & Whitener Alternative

Praan Naturals' Tagua Seed Powder (INCI: *Phytelephas aequatorialis* (tagua) seed powder), sourced from Ecuador, is a natural alternative to synthetic exfoliants and whitening agents, per the company. It is produced using ethically harvested and upcycled tagua seeds—with no added fillers or other materials.

When ground into a fine powder, tagua seeds generate a pure white, plant-based exfoliant that is suited for cleansers and exfoliating products, per the company.

Anáil Moon Devi, CEO of Praan Naturals, comments, "Praan Naturals' Tagua Seed Powder is a derivative (secondary) product made from tagua seed pieces that remain after Ecuadorian community artisans produce buttons and ornamental objects. Grinding these remaining pieces into Tagua Seed Powder ensures that none of the beneficial seed material goes to waste."

Praan Naturals' manufacturing partner reportedly supports local indigenous communities, engages in fair trade and is FairWild certified.



Image by M•H at Adobe Stock

Asakura City (pictured) is home to the Kogane River, which is said to be the only natural habitat for Suizenji nori.

Sustainable Beauty Upgrades

In addition to clean swaps for conventional ingredients, a number of suppliers offer more sustainable options for brand marketers and formulators.

For instance, Grant Industries' Gransense TC-55X/C is a bio-based elastomer for skin care formulations that is COSMOS-approved. The technology reportedly imparts a notable velvety skin feel. And, per the company, "Its sustainable profile and exceptional performance are set to redefine expectations in skin care sensory experiences."

Elsewhere, Pilot Chemical Company's CalCare 190C is a personal care biosurfactant with a 98.6% Renewable Carbon Index, per the company. The clear material has a stable pH range of 3-11 and the ability to form high and stable foam.

U.S.-manufactured, CalCare 190C has a foam and lather profile that makes it appropriate for shampoo and body wash formulations and is reportedly compatible with other surfactants.

"What makes CalCare 190C special is it can help reduce your carbon footprint without sacrificing efficacy," said Richard Rehg, vice president of commercial, Pilot Chemical Company. "It also helps meet the need of procuring sustainable biosurfactants without the hassle of long lead times or unreliable supply." ■

PACKAGING TREND TRACKER: MAY 2024

From heavy-walled bottles to enhanced refillable formats to unique applicators, packaging designs offer a growing array of brand benefits.



Baralan has collaborated with 3D printing specialist Stratasys and glass/plastic coatings specialist ICA to launch GP3DPrint, a water-based 3D decorating service for cosmetic packaging.

Courtesy of Baralan

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Improving Refillable Beauty

Berlin Packaging | Premi Industries recently highlighted concepts featuring designs intended to improve the refillable beauty experience.

The company's Euphoria collection of glass perfumery bottles, for example, is available with FEA15 or 15/415 refill necks and in 30 ml, 50 ml and 100 ml capacities with a cylindrical conical section.

The 15/415 refill models, in combination with the refill set, consist of a larger capacity glass bottle and a unique refill accessory, offering consumers the possibility to easily and safely refill bottles once the product has been used up.

The design's screw neck, meanwhile, allows for easy separation of the packaging's different materials, thereby easing proper disposal of recyclable materials.

The Euphoria collection features a rounded shoulder and a thick glass base; it can be customized with different glass decorations and accessories such as the company's new Sopoy and Kopoy caps, one of which features an opaque shiny pastel-colored varnish with tone-on-tone screen-printing and hot-foil printing, and another that features black screen printing and gold hot stamping.

Meanwhile, the company's Infusion Refill collection has added variants with 50 ml, 30 ml and 15 ml capacities, in addition to the 100 ml container. The Infusion Refill collection was initially unveiled at the 2023 Luxe Pack Monaco event.

Elsewhere, the company has added a Luxe 50 ml refill to its Luxe range, allowing consumers to reuse components such as the outer glass jar and its accessories.

The glass mouth's design houses the monomaterial PP refill cup for easy replacement thanks to a mechanism between the neck of the glass jar and the cup, which reportedly ensures both a secure fitting and easy removal of the refill.

Finally, Berlin Packaging | Premi Industries' Double Glass Refill & Go refillable glass collection for makeup



Berlin Packaging | Premi Industries' Euphoria 15/415 refill models, in combination with the refill set, consist of a larger capacity glass bottle and a unique refill accessory, offering consumers the possibility to easily and safely refill bottles once the product has been used up.



Berlin Packaging | Premi Industries' Euphoria collection of glass perfumery bottles is available with FEA15 or 15/415 refill necks and in 30 ml, 50 ml and 100 ml capacities with a cylindrical conical section.



Berlin Packaging | Premi Industries has added a Luxe 50 ml refill to its Luxe range, allowing consumers to reuse components such as the outer glass jar and its accessories.

Coustesy of Berlin Packaging | Premi Industries



Arcade Beauty has created the Single-Use 3D Refill Pouch, a new variation on its resealable 3D Pouch.



Epopack's AH series of premium bottles comprises recyclable PET, with an option made from 100% PCR material.



ICONS|ICS has launched a collection of metal-tip applicators and rollers, which offer cooling and massaging effects for eye, lip, face, lash and brow formulations.

and skin care is available in 15 ml and 30 ml sizes.

The design's core glass ampoule and pump can be removed for use as a mobile packaging component, per the company. This same mechanism also simplifies the refill process.

Meanwhile, Arcade Beauty has created the Single-Use 3D Refill Pouch, a new variation on its resealable 3D Pouch. The new pouch is available with a breakable closure in fully recyclable monomaterial. The single-use design of the pouch allows the original primary product packaging to be leveraged for multiple uses.

"Providing shoppers with a recyclable refill option for full-sized products is certainly a step in the right direction—it will help to reduce rigid packaging and in turn significantly reduce carbon emissions," said Lindsey Khosla, marketing director at Arcade Beauty, "and the single-use nature of the package will encourage shopper education on the purpose of refill packaging."

The latest sustainable design advancements are part of a larger evolution at Arcade Beauty.

By 2025, the company will reportedly ensure that 100% of its products will have a recyclable alternative, will be water-soluble or compostable.

In addition, at least 75% will integrate recycled or certified material.

"As a global industrial company, we are committed to providing sustainable solutions through our deep manufacturing and packaging expertise to support the needs of the beauty industry," said Arcade Beauty CEO Carl Allain.

He added, "By 2030, just as we will no longer manufacture non-recyclable products, it will no longer be acceptable to throw away unused beauty products, whether in a sample or full-size format."

Allain concluded, "We are redirecting our business to become a contributive company and as one of the four pillars of our CSR policy, eco-design is at the core of our sustainable activities."

Glass-like Heavy-wall Bottles

Epopack's AH series of premium bottles comprises recyclable PET, with an option made from 100% PCR material. The lightweight heavy-wall bottles feature a glass-like appearance and feel that is shatterproof, offering elegance, durability and safety.

The AH series bottles are fully customizable with injection color, printing and hot stamping.



Berlin Packaging | Premi Industries' Interstellar collection features full-bodied, angled tip flocked applicators designed to provide precise dosing and a pleasant, soft sensation on skin.

In addition, the bottles can be paired with droppers, screw-on caps, treatment pumps or sprayer pumps, offering flexibility for products such as lotions, serums and mist sprays.

Upgraded Applicators

ICONS|ICS has launched a collection of metal-tip applicators and rollers, which offer cooling and massaging effects for eye, lip, face, lash and brow formulations.

Made with durable Zamac or stainless steel, the applicators include new spatula as well as spiral, tapered

From top, L to R: courtesy of Arcade Beauty; Epopack; ICONS|ICS; Berlin Packaging | Premi Industries



ICONS|ICS' new octagonal tube options offer a unique shape that stands out from standardized design profiles.



Tianshi's new paper airless dispenser, Rebo Paper, is designed to defend cosmetic and personal care product freshness and longevity while eliminating the need for traditional propellants.



Molpack has launched the M3R airless range, available in 30 ml and 50 ml capacities.



ICONS|ICS' Menda pump bottles are ideal for products such as micellar water.

and teardrop shapes, along with bristle-free spiral metal mascaras for precise application.

The collection includes tubes and wands in several shapes, sizes and options available in PCR, ocean plastic and sugarcane materials.

Meanwhile, Berlin Packaging | Premi Industries' Interstellar collection features full-bodied, angled tip flocked applicators designed to provide precise dosing and a pleasant, soft sensation on skin.

Ideal for foundations, concealers, lip oils, primers, serums and skin care treatments, the packaging is available in 10 ml, 20 ml and 30 ml variants.

Interstellar's capsule and rod can be customized to match with other bottles in the Berlin Packaging | Premi Industries catalogue.

Octagonal Tube Design

ICONS|ICS' new octagonal tube options offer a unique shape that stands out from standardized design profiles.

The PE tubes with PP cap are available in D16 and D19 and are available with applicators including nozzles, rollerballs and doefeet.

Tubes can be decorated with offset printing, silkscreen or hot stamping on any of the tubes' eight sides.

From top, L to R: courtesy of ICONS|ICS; Tianshi; Molpack; ICONS|ICS

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The 3D graphics are applied to Baralan's packaging using Stratasys' Polyjet technology. This printed material adheres strongly to the underlying glass packaging, ensuring integrity of design, Baralan has noted.



Arcade Beauty recently unveiled a paper-based sample collection for makeup, skin care, hair care and fragrance, swapping conventional materials with paper-based laminates. Sampling options include the 90% paper BeautiPod, 76% paper Thermoform and 48% paper ScentSeal.

Sustainable Airless

Tianshi's new paper airless dispenser, Rebo Paper, is designed to defend cosmetic and personal care product freshness and longevity while eliminating the need for traditional propellants.

The dispenser is refillable, accommodating PCR PP cartridges. Caps and outer shells can be rendered in paper, while the pump components are rendered in PP.

The manufacturer offers deco options such as hot foil stamping, high-definition printing, embossing and more, allowing for both bold designs and intricate detailing, per the company.

Meanwhile, Molpack has launched the M3R airless range, available in 30 ml and 50 ml capacities.

M3R, which stands for "monomaterial, recyclable, recycled and refill," is manufactured in Europe only with PP, but is also available in PCR materials.

The range will soon be expanded with an internal refill system.

Elsewhere, Barcelona-based Faca Packaging's PET Airless Dispenser is designed to protect products from the air, thereby extending their freshness without requiring the addition of extra preservatives.

Faca is particularly focused on PET designs using feedstocks that offer a high degree of transparency and recyclability.

Common deco options used by the company include metallization and lacquering.

Micellar-friendly Pumps

ICONS|ICS' Menda pump bottles are ideal for products such as micellar water.

The company offers several round options, as well as new square-shaped PP bottles, available in 100 ml, 120 ml, 150 ml and 200 ml variants.

Democratizing 3D Printing

Baralan has collaborated with 3D printing specialist Stratasys and glass/plastic coatings specialist ICA to launch GP3DPrint, a water-based 3D decorating service for cosmetic packaging.

The move renders personalized, unique and prestige deco accessible to a wider array of brands.

GP3DPrint leverages a water-based paint product developed by ICA exclusively for Baralan, which can be combined with the supplier's bio range.

The 3D graphics are applied to Baralan's packaging using Stratasys' Polyjet technology. This printed material adheres strongly to the underlying glass packaging, ensuring integrity of design, Baralan has noted.

As a result, brands can tap 3D printing at mass production scale.

At the same time, the lack of expensive molds or other massive production setups makes the process both sustainable and affordable, per Baralan.

Brands can use the technology to design in large dimensions or create limited series to render products more collectible.

"Thanks to this project, it is now possible to have a unique, recognizable and outstanding product, without having to invest in expensive equipment, while at the same time promoting eco-sustainability," said Maurizio Ficcadenti, global R&D manager of Baralan Group. "3D printing on glass and plastic is tangible thanks to its adherence to the glass, transparency and charm through the use of infinite colors and designs."

More Sustainable Sampling

Arcade Beauty recently unveiled a paper-based sample collection for makeup, skin care, hair care and fragrance, swapping conventional materials with paper-based laminates. Sampling options include the 90% paper BeautiPod, 76% paper Thermoform and 48% paper ScentSeal.

The company has also developed a 63% paper packette (an 80% paper variant is in development, per Arcade Beauty). For its client, Nécessaire, Arcade Beauty developed two 63% Paper Packettes to help promote the brand's Body Wash and Body Serum. ■

L to R: courtesy of Baralan; Arcade Beauty

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New systems are designed to track the identity and authenticity of natural ingredients, finished products and more.

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BEAUTY'S NEXT-LEVEL TRACEABILITY

Beauty traceability efforts, aided by tech, are advancing quickly.

Beauty traceability is taking on new intensity, fusing sustainable practices and technology.

Terroir-specific Traceability

In April 2024, Clarins group acquired 115 hectares of land in Domaine Sainte-Colombe, France, including 50 hectares of farmland, which will be used to produce and process plants for the company's beauty products.

The first cultivation of organic plant matter using regenerative practices is planned for autumn 2024, per the company. The first harvests are planned for 2025/2026.

Eventually, Clarins will harvest about 50 species of trees and plants from the region, including nopal, quince, almond, apricot, lavender, lemon thyme and cornflower. By 2030, the project will reportedly produce one-third of the plants Clarins uses in its products.

The acquisition follows Clarins' 2016 acquisition of Le Domaine de Serraval in Haute-Savoie, France, which supplies the company's laboratories and factories with 2.5 tons of plants.

The land acquisitions align with Clarins' broader mission to enhance the traceability of its supply chain.



In January 2024, the Clarins Group joined 15 cosmetics companies in the TRASCE (Traceability Alliance for Sustainable CosmEtics) consortium for the enhanced traceability of beauty ingredient and packaging supply chains.

Image by HJBC at Adobe Stock

Digital Supply Chain Mapping

In January 2024, the Clarins Group joined 15 cosmetics companies in the TRASCE (Traceability Alliance for Sustainable CosmEtics) consortium for the enhanced traceability of beauty ingredient and packaging supply chains.

Sponsored by France's FEBEA (Fédération des Entreprises de la Beauté), TRASCE will support participating companies in mapping their supply chains on a common digital platform, Transparency-One.

By using a common platform, the TRASCE participants hope to develop a common analysis of the industry's and companies' CSR-related risks, which will allow organizations to uniformly track progress.

A Genetic Bank for Natural Beauty Ingredients

Clarins has also joined the DNA & Cosmetics consortium, comprising Croda Beauty Actives, DNA Gensee, Greentech, L'Oréal and Nuxe, which recently announced that its prototype database bank of genetic signatures is underway. The database is to be used in authenticating plant resources for maximum traceability in beauty.

The database has been developed in collaboration with botanical gardens and/or specialized conservatories, which are assisting in authenticating plant samples and determining genetic signatures.

The consortium has also worked to globalize its activities by adopting top companies in the beauty market, including producers of consumer brands.

The project leverages the DNA Gensee laboratory "to 'read' DNA barcodes on plants and algae to ensure their authentication with high reliability."

France-based DNA Gensee features "a DNA analysis laboratory to identify the plant species present in ... raw materials, ingredients and finished products," according to the company.

It adds, "The genetic analyses carried out will enable you to guarantee the botanical authenticity and even geographical origin, and to ensure the traceability, safety, and quality of the natural extracts you use."



The SEA Vision system reportedly tracks products from manufacturing to distribution, including serialization and aggregation during the packaging process, warehouse management, and the final phase of distribution and sales to consumers.

Tracking Products from Manufacture to Shopper

Elsewhere, to combat gray market products and give reassurance to consumers regarding product authenticity, Marchesini Group Beauty's SEA Vision subsidiary has created a platform that enables manufacturers to digitize product information for complete visibility of the distribution chain.

The SEA Vision system reportedly tracks products from manufacturing to distribution, including serialization and aggregation during the packaging process, warehouse management, and the final phase of distribution and sales to consumers.

The system comprises the company's Yutrace software, which collects and stores all production and serialization data at production sites in a database. It also features systems for visual inspection and serialization on packaging lines, allowing brands to apply a unique identifier on products.

The software manages the full cycle of printing of QR codes/DataMatrix/1D codes/RFID/NFC tags and their subsequent control. Each unique identifier is registered into the database and readable along the entire supply chain.

Other elements include Reworkapp and Pickapp for processes of reworking and picking in the warehouse, respectively.

Additional information can be integrated by distributors, importers or agents; the system features different levels of access to provide specific information based on the type of user, from consumer to manufacturer to importer and beyond.

At the end of the line, the consumer can scan a product's digital code to access the manufacturer's web page containing all the information about the ingredients, usage and disposal of the product, per SEA Vision. This process also confirms authenticity.

These recent innovations are just a fraction of the new technological advances in beauty's traceability evolution.

More are sure to come on line as demands for transparency and information access escalate. ■



Authenticating natural ingredient genetic signatures is a key goal for a new consortium of beauty suppliers and brands.

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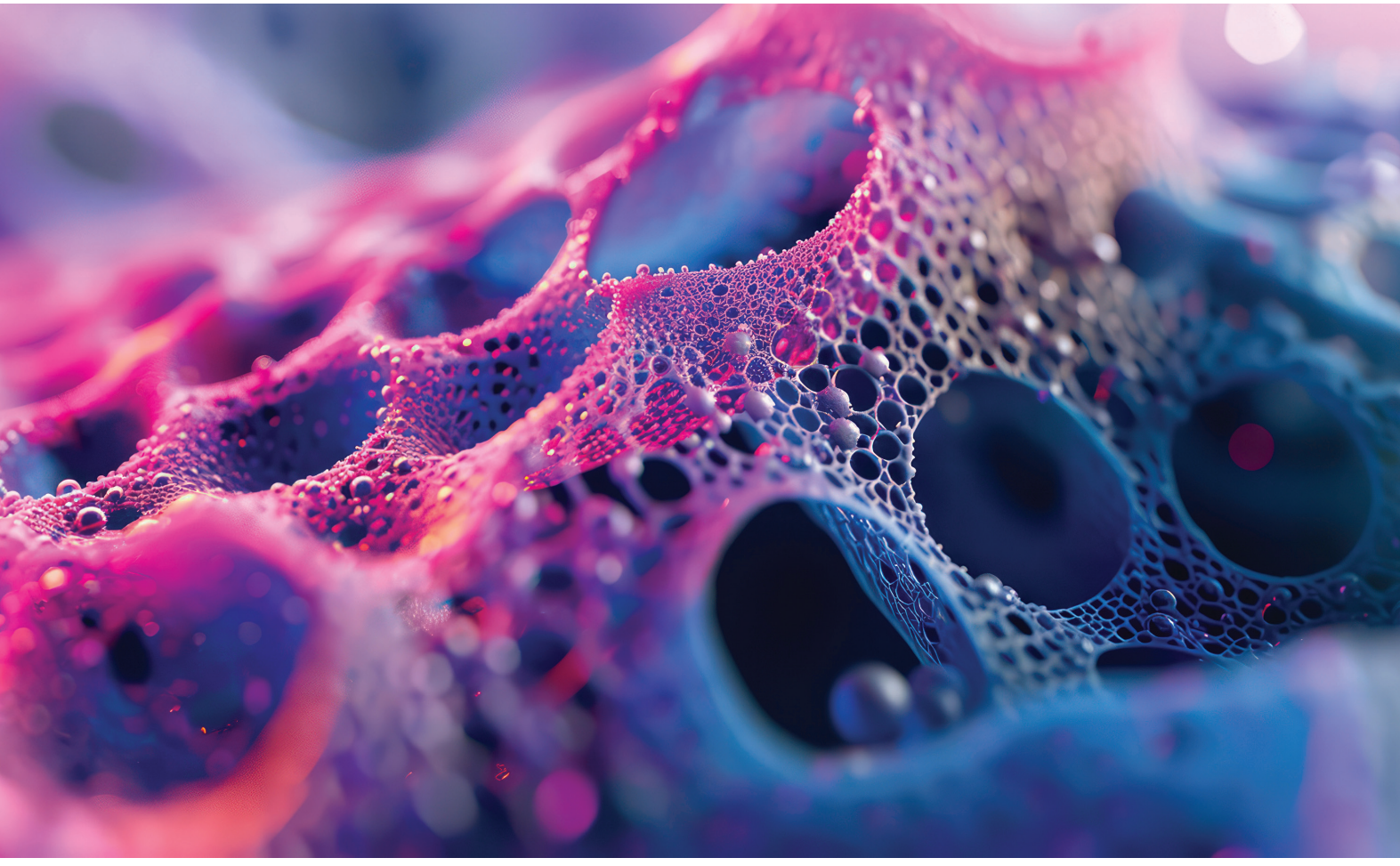
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THE BEAUTY OF AI IS SPEED

Artificial intelligence is accelerating beauty innovation behind the scenes.



Sequential learning can train AI systems on relatively tiny beauty formula data sets.

In the last year, consumer-facing AI has stolen all the headlines, from AI-generated product recommendations and marketing assets to enhanced skin diagnostic tools. Yet the technology is also set to upend the beauty product innovation behind the scenes.

How AI is Driving Better Beauty Innovation

For instance, in 2023, Cambridge, Massachusetts-based Osmo made a splash with its mission of giving computers "a sense of smell" by pairing odor maps with AI to predict what a molecule smells like based solely on its structure. The goal: to create safer, more environmentally friendly aroma molecules for the flavor and fragrance market.

Elsewhere in the fragrance world, Cosmo International Fragrances created the ScentElligence AI platform

Image by ANStudio at Adobe Stock

to analyze data and deliver fragrance options by combining sensoriality with performance.

AI is also turning up in the wider beauty space. For example, Cosmex AI's tool is designed to validate cosmetic product formulas against multiple regulatory guidelines, including national/regional requirements and retailer standards.

Cosmex AI reportedly screens data sets from more than 30,000 cosmetic ingredients to determine if a formula complies with a specific target. If not, the system flags the non-compliant ingredients and percentages, informs the user about the compliance issues, and recommends corrective actions to bring the formula into compliance.

No doubt, artificial intelligence has the power to help brands to create better formulations faster.



AI platforms can shave down development timelines from 12-18 months to as little as 2.5 months, Citrine Informatics argues.

Small Data Sets? No Problem

One such AI platform from Citrine Informatics reportedly allows brands—from indies to multinationals—to create better, faster.

From reformulations targeting greater biobased and sustainable content to time-sensitive on-trend product ideation, Citrine empowers brands to develop consumer-preferred products with precision.

The Citrine Informatics platform was designed in response to rapid trend cycles and escalating demands for clean and sustainable beauty.

The goal, according to Citrine, is to empower brands to develop consumer-preferred products with precision.

Notably, getting started with the platform requires. relatively small data sets.

"It sometimes surprises people how little data you need to start an AI project on the Citrine platform," says Greg Mulholland, CEO and co-founder of Citrine Informatics. "A beauty product customer came to us with just 30 data points and we were able to hit their property targets with just 40 more carefully chosen experiments."

Mulholland adds, "More than one CPG customer has used our platform to predict stability of products over the long-term using short term data, speeding up their R&D process."

How AI Shortens Beauty Development Timelines

In another case, Mulholland says, "Our customer was able to reformulate a trio of skin care product using naturally-derived ingredients that were completely new to them in just 2.5 months."

The average timeline for a similar project is generally estimated to be 12-18 months. To cut down on a year-plus of development time, Citrine Informatics' client tapped 50 data points that measured two product properties of interest based on tests carried out on formulations containing naturally derived ingredients.

Because those samples didn't have every element the brand sought, its team filled in the gaps based on its collective experience, identifying ingredients and their usage levels to help guide the AI model. They also provided information on the relevant properties of the ingredients used and how they would impact the desired results.

The client used sequential learning via small rounds of experiments, the results of which were fed back into the Citrine Platform to improve the AI model and choose the next experiments. Each round of tests generated 10 formulation candidate formulations to be tested in subsequent rounds.

By testing more unusual formulations early, the AI model can better understand the breadth of the formulating landscape, Citrine Informatics argues, with later rounds more tightly focused on hitting targets quickly.

In the case of the client developing the trio of products, four rounds of 10 experiments (40 experiments in total) were conducted. In this way all three key property targets were reportedly hit.

For brands seeking speed to market and nimble response times to trends or shifting market conditions, AI may just offer a solution. ■

Image by Mirma at Adobe Stock



According to Euromonitor International's Voice of Consumer, Beauty Survey 2023, Chinese beauty consumers embrace beauty devices at a higher rate than the global average. Electric facial toners, for example, were used at home by almost 17% of Chinese beauty consumers—up from 13% in 2020.

Image by atiger at Adobe Stock

LESSONS FROM CHINA'S BEAUTY TECH MARKET

Overall market competition will gradually shift from marketing and price competition to product innovation and scientific validation.

BY JIN LIU, Senior Analyst, and YANG HU, Insights Manager, Health & Beauty, Euromonitor International

In China, as consumers' demand for skin care has become increasingly sophisticated and science-based, home-use beauty devices have gradually become an important step in the skin care routine.

Euromonitor International projects the 2024 market size of small personal care appliances in China to reach $7.4 billion, with a constant CAGR of 2.4% between 2024 and 2028. Among small personal care appliances, the beauty device market has witnessed rapid growth, attracting new players pouring in the market.

However, with the introduction of new regulations for beauty devices in 2024, the market landscape is poised for a significant reshuffling.

Millennials Lead Growth

Driven by the trends of the "joyful economy" and the "beauty economy," Chinese consumers' demand for skin care is shifting toward precise scientific routines. The popularity of content marketing on social media, such as XiaoHongShu and Douyin, has deepened consumers' understanding and accelerated the need of at-home beauty devices.

According to Euromonitor International's Voice of Consumer, Beauty Survey 2023, Chinese beauty consumers embrace beauty devices at a higher rate than the global average. Electric facial toners, for example, were used at home by almost 17% of Chinese beauty consumers—up from 13% in 2020.

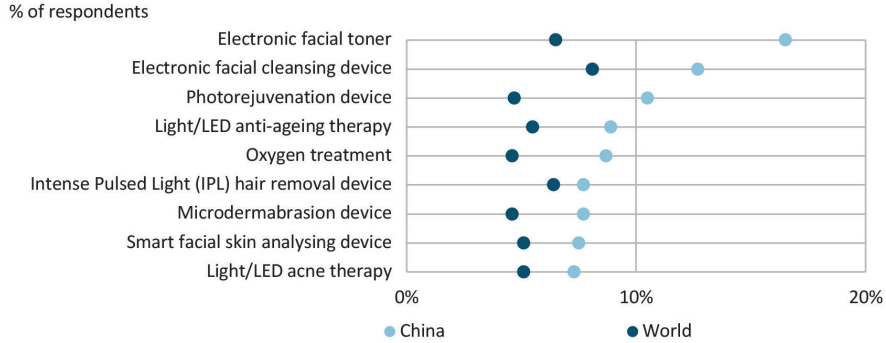
Brands are also constantly deepening insights on consumer demand by developing segmented skin care functions, such as eye care, jawline lifting, etc. Usage benefits tended to resonate most among millennials, particularly since millennial females have the highest spending power on beauty products and services. Generation X is the next largest user group, followed by baby boomers.

Most Popular Beauty Devices in China

Radiofrequency (RF) devices account for a large proportion of the total volume of beauty device sales (**T-1**) in China, but LED devices have shown strong growth potential.

LED beauty devices with various wavelengths address distinct skin concerns, including acne, allergies,

T-1. Usage of Beauty Devices, 2023



Source: Euromonitor International, Voice of Consumer Beauty Survey

skin whitening and brightening. And, compared to RF devices, LED devices are more suitable for sensitive and acne-prone skin with less irritation. This is a critical distinction because, in 2023, 16% of Chinese cosmetics consumers reported sensitive skin issues—up from almost 14% in 2021.

Moreover, when using mask-type LED products, consumers can also safely open their eyes and move their hands freely.

Integrating Devices Into Beauty Routines

In China, the self-care trend has gained momentum; beauty consumers, who are well-versed in aesthetic treatments, are now integrating beauty devices into their routines as a convenient and long-term solution.

A pivotal factor influencing their purchase decisions is the synergy achieved by using beauty devices in conjunction with skin care products. Over social media, influencers have played a significant role in promoting these synergies by demonstrating how to maximize efficacy with different combinations of topicals and technologies.

Furthermore, the market has witnessed an expansion of skin care brands moving into devices and vice versa. In 2023, Lancôme unveiled its new device for Rénergie product line at the 6th China International Import Export event.

Many beauty devices now come bundled with skin care products like serums and face masks. For instance, Chinese brand QuasarMD highlights the booster effect to attract consumers by offering device and skin care kits.

Multifunctionality and Personalization to Drive Premiumization

"Smart personalization" has emerged as a key feature of premium products. Smart beauty devices now not only offer a range of different functions, but also include visual skin analyses through mobile apps and tailored programs addressing various concerns.

One notable example is the Chinese brand OGP, which has introduced the concept of intelligent systems in its new Photorejuvenation device. This device can emit three different wavelengths of photons to target melanin, redness and dullness, respectively.

Users can get their treatment programs customized, including the usage cycle, duration and recommended wavelengths, all based on skin analysis results through the connected mobile app.

Looking ahead, beauty device players will need to focus on providing a seamless user experience in addressing consumers' evolving skin care needs with technology.

New Beauty Device Regulations Could Reshuffle the Landscape

Currently, at-home beauty devices in China are considered small appliances and are regulated by the relevant industry standards, which lack the process of clinical verification. For example, concerns about RF beauty devices are increasing, including worries about exaggerated claims and false advertising.

To better regulate the RF beauty devices, China's National Medical Products Administration has issued the "Radiofrequency Beauty Device Registration Review Guidelines" that will regulate RF devices as Class III medical devices, which is the highest-risk level of medical devices. Starting in April 2024, the production, import and sale of RF beauty devices is now prohibited unless medical device registration is obtained.

The new regulation is expected to change the current competition landscape of the RF beauty device market, and long-tail brands without qualifications will be eliminated. With the stringent regulation, the threshold for the RF beauty device industry



In 2023, Lancôme unveiled its new device for Rénergie product line at the 6th China International Import Export event.

Courtesy of Lancôme

will increase, and the unit price is likely to rise.

Leading local Chinese brands like Flossom, Yaman, OGP and AMIRO have already begun their clinical trials to obtain the medical device registration. In the future, beauty device products with innovation and true efficacy are likely to win the market.

The Future of Beauty Devices in China

The beauty device market in China has witnessed remarkable growth. With advancing consumer knowledge and rising demand for beauty devices, as well as the newly introduced regulations further standardizing the market, overall market competition will gradually shift from price competition to product innovation and scientific validation.

The increasing demand for high-efficiency skin care products and the widespread acceptance of non-invasive aesthetics indicate that the demand for beauty devices will increase further.

The implementation of new regulations will lead to a major reshuffle in the industry. Brands without medical device permits will be filtered out, leaving only top-tier brands, which may cause a short-term volume decrease and price increase on the overall market size.



Leading local Chinese brands like Flossom (pictured), Yaman, OGP and AMIRO have already begun their clinical trials to obtain China's new medical device registration.

In the long run, it means a shift in market competition from marketing and price competition to product innovation and scientific support. ■



WHAT CONSUMERS WANT FROM HAIR CARE IN 2024

From serums to scalp care to microbiome solutions, shoppers want more from their products.

BY DENISE HERICH, THE BENCHMARKING COMPANY

A version of this article was presented as part of the 2024 Beauty Accelerate *event in Los Angeles. Stay tuned for details of our 2025 edition. -Editor*

The global hair and scalp care market is expected to grow at an annual rate of 6.6% through 2028[a], with prestige hair care growing 14% in 2023, per Circana[b].

U.S. consumers are doing their part to keep the category moving strongly forward, with more than 95% of U.S. females buying at least one hair care product for themselves in the past 6 months.

To take a deep dive into the hair care products she's buying now and what she's looking for from brands in the future, The Benchmarking Company conducted a primary online research study in February 2024 of more than 3,300 U.S. female hair care consumers.

Here's what we found.

She's Got Issues

Damaged hair that results in frizz (56%), hair feeling dry/hydration issues (54%), split ends (52%), lack of shine or luster (48%), limp hair that lacks volume (40%), thinning hair (38%), and dull, lifeless hair (38%) top the U.S. female consumers' list of hair problems they're currently experiencing (**F-1**).

These issues are followed by graying hair (33%), hair that lacks vibrancy or has color fade (33%), heat damaged hair (31%), managing curls or coils (25%), dry scalp issues (23%), hair that resists holding a style (22%), and wiry/brittle hair (19%).

Only 1% of respondents surveyed said they have no current hair concerns.

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[a]www.grandviewresearch.com/press-release/global-hair-care-market

[b]www.circana.com/intelligence/press-releases/2024/growth-streak-continues-for-the-us-beauty-industry-in-2023-circana-reports/

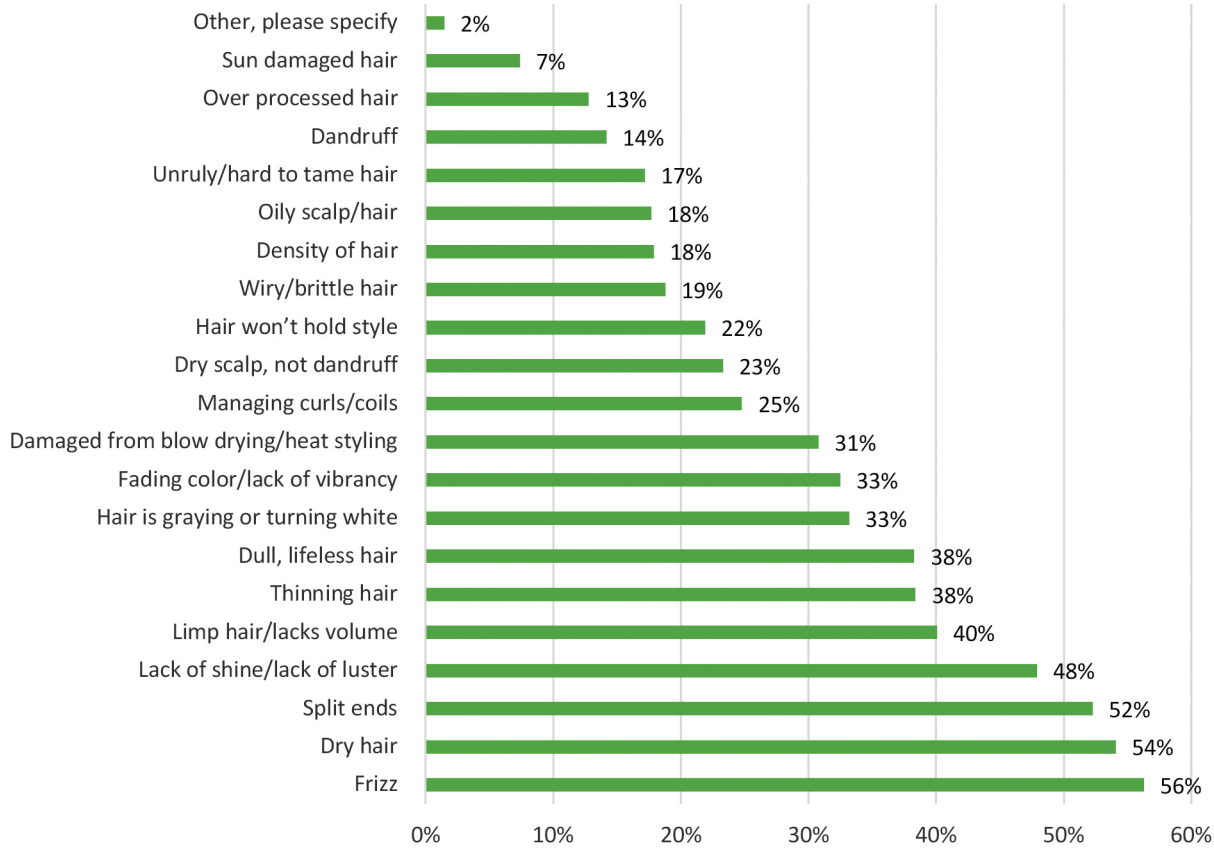
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Image by Chanelle Malambo/peopleimages.com at Adobe Stock

Forty-seven percent of consumers say they spend less than $30 per month on their hair and scalp care products, with 16% spending between $31 and $45.

F-1 Hair issues that concern her



Consequently, when she's looking for hair care products, she looks for solutions to her problems, taking special note of the benefits listed on the hair product's package or other marketing material (**T-1**).

What She's Buying & Why

Traditional shampoos (99%) and conditioners (96%) remain the most popular hair care products she buys, with 47% saying they wash their hair 2-3 times per week. Fifty-four percent of respondents say they have 3-5 bottles of shampoo and conditioner in their shower right now.

Ninety-seven percent say they look for specific benefit statements on their shampoos and conditioners that can assist with their current concerns, as detailed in **T-2**.

Following shampoos and conditioners, the most popular product types purchased include leave-in conditioner (59%), heat protectant product (44%), frizz control/smoothing product (44%), hair spray (43%), hair mask (41%), dry shampoo (37%), hair oil (35%), hair serum (33%), detangler (28%), mousse (28%), at-home hair dye (26%), styling cream (25%), curl product (25%), shine spray (23%), texturizer (22%) and gel (17%).

Specific problem-related hair care products were purchased with less frequency, as they are need-specific. These products include scalp treatments (17%), hair loss/thinning solution products (13%), keratin products (12%) and gray protection/gray delay hair products (3%).

Ingestible supplements to combat hair issues are currently used by 27% of respondents for these reasons:

1. Make hair healthier
2. Reduce hair loss
3. Strengthen the hair follicle
4. Reduce constant shedding
5. Improve health of the scalp
6. Delay/reduce gray hair

Spending Patterns for Hair Care

Forty-seven percent of consumers say they spend less than $30 per month on their hair and scalp care products, with 16% spending between $31 and $45. Just 13% spend between $46 and $65 monthly, while 24% spend more than that on a monthly basis (**F-2**).

T-1. Top benefits she looks for when shopping for hair care products overall

	Percent
Healthier hair	51%
Moisturization/conditioning	49%
Elimination of frizz	41%
Shine	39%
Volume	35%
Damage repair	33%
Stronger hair	32%
Reduction in split ends	28%
Thicker hair	27%
Scalp health	22%
Hair growth	21%
Curl defining	17%
Detoxifying build-up on hair/scalp	15%
Color extension	13%
Fast, easy styling	12%
Style hold	11%
Gray prevention or gray delay	11%
Immunity from the effects of humidity	11%
Faster blow dry, ironing or overall finishing time	7%
Lip augmentation	18%
Blepharoplasty (eyelid surgery)	13%
Gastric bypass/sleeve surgery	13%
Rhinoplasty	12%
PDO thread lift	9%

T-2. Shampoo and conditioner benefit statements she looks for

	Percent
Moisturizing	69%
Strengthening	53%
Anti-frizz	52%
Damage repair/bonding	45%
Volumizing/adding body	43%
Support healthy hair growth	41%
Shine	37%
Color-protecting	34%
Scalp cleansing or detoxifying	29%
Hair detoxifying/clarifying	25%
Softening	25%
Anti-aging	15%
Anti-dandruff	15%
Reduce oiliness	14%
Purple shampoo	12%
Color-depositing	5%
Co-Wash (conditioner-based cleansing)	5%

T-3. Favorite hair care scents

	Percent
Fresh	40%
Coconut	38%
Fruity	27%
Citrus	24%
Light flowers (gardenia, jasmine)	22%
Floral	21%
Spring/clean	17%
Vanilla	16%
Lavender	14%
Energizing	12%
Tea tree/mint	12%
Honey	10%
Perfume	8%
Rose	8%
Subtle	7%
Hardwood/spice	6%
Musky	6%

T-4. Types of essential and other oils consumers look for in hair care products

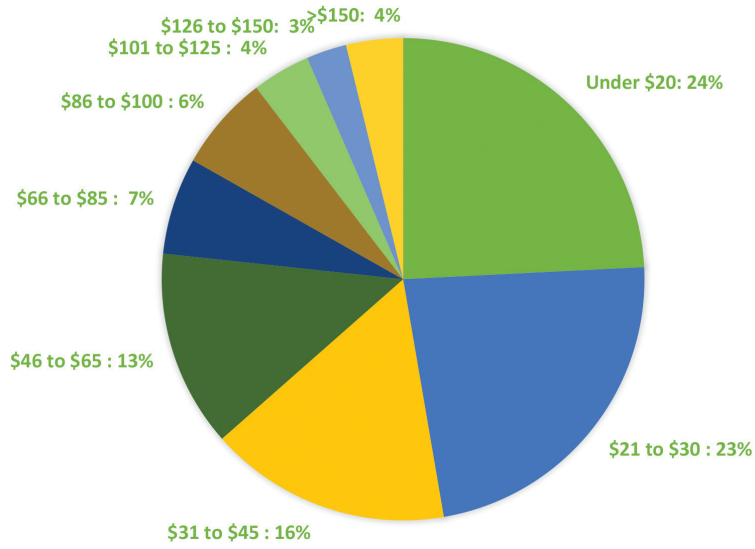
	Percent
Argan oil	72%
Tea tree oil	70%
Coconut oil	66%
Jojoba	57%
Rosemary oil	53%
Eucalyptus oil	47%
Lavender oil	46%
Almond oil	45%
Peppermint oil	44%
Avocado oil	43%
Chamomile oil	41%
Olive oil	40%
Marula oil	34%
Lemongrass oil	34%
Orange oil	32%
Sunflower seed oil	30%
Ylang-ylang oil	28%
Chia seed oil	27%
Cedarwood oil	23%
Clary sage oil	23%
Frankincense	23%
Patchouli oil	22%
Calendula oil	22%
Thyme oil	19%
Oregano oil	17%

Hair Care Retail Preferences

Superstores (61%) remain the consumer's top retail outlet for hair care products, followed by *Amazon.com* (55%), Ulta or *Ulta.com* (43%), Sephora or *Sephora.com* (36%), drug stores (26%), a hair care brand's own website (23%), discount department stores (21%), grocery stores (17%), salons/spas (16%), beauty specialty stores other than Sephora or Ulta (16%), and big box stores such as Costco (13%).

Less than 10% of respondents said they buy hair care regularly through a subscription box service (9%), upscale department store (7%), a traditional beauty online retailer such as *netaporter.com* (5%), direct sales (3%) or home shopping channels (3%).

F-2 Consumer hair care spending patterns



T-5. Where consumers across generations learn about new hair care product

Where Gen Z learns about new hair care products	Where those older than Gen Z learn about new hair care products
49% In a store	45% In a store
36% A TikTok influencer/celebrity ad	35% Friend/family member
35% Friend/family member	32% Hairstylist
31% Instagram influencer/celebrity ad	24% A hair care brand's own website
28% TikTok brand video/how-to	23% Samples received in store

T-6. Top buying influencers across generations

Where Gen Z learns about new hair care products	Where those older than Gen Z learn about new hair care products
66% Clear benefit statements on package	60% Clear benefit statements on package
53% Lots of proof the product works: consumer claims, clinical claims, etc.	46% Free sample
29% Free sample	45% Lots of proof the product works: consumer claims, clinical claims
26% Education on what the product does, concerns it addresses	21% Before and after photos
22% Before and after photos	20% Stylist recommendations/smell of product

Hair Care Brands Aplenty, Loyalty is Rare

To maintain her hair health, 96% of survey respondents say they use a variety of hair care brands, with 56% saying they use 3-4 brands per week. Sixty-seven percent switch their shampoo brands either every few weeks or every 3-6 months.

Only 6% say they never switch their shampoo, conditioner or styling product brands.

The most popular brands she's using now (**F-3**) are in the mass or masstige category, with few exceptions. L'Oreal continues to dominate consumer hair care, with 33% saying they purchase the brand's products. Garnier and TRESemmé follow (both at 22%), followed by Pantene (21%), Olaplex (20%), Dove and Redken (both at 19%).

Scent as a Buying Motivator

When considering the purchase of a new hair care product she's never purchased, 33% say the smell of the product can act as a purchase motivator.

Fifty-five percent of hair care buyers say they always smell an unfamiliar hair care product before buying it; 27% do so most of the time, with 12% saying they sometimes smell the product before buying.

Her favorite hair care product scents include fresh (40%; **T-3**), coconut (38%), fruity (27%), citrus (24%), light flowers (22%) and floral (21%).

Ingredients of Importance

With cleaner, more natural ingredients preferred by 59% of hair care buyers, it's no surprise that naturally derived ingredients make a strong showing in her list of those she wants to see in her hair care products.

Biotin, the water-soluble B vitamin, remains the workhorse ingredient for healthier and fuller hair, and is a desired ingredient by 65% of hair care buyers (**F-4**). Plant extracts and roots (59%), keratin (58%), collagen (56%), essential and other oils (50%), and botanicals (43%) remain at the top of her ingredient lists.

Of the 59% who said they look for plant extracts/root ingredients in their hair products, 80% specifically look for aloe vera, followed by chamomile extract (64%), papaya extract (57%), ginseng (50%), black walnut extract (38%) and mushroom extract (38%).

The array of specific essential and other oils consumers seek in hair care products is much more extensive (**T-4**), with argan oil topping the list at 72%.

Skinification Trends & Her Wish List

New technological innovations in scalp and hair care have encouraged consumers to dream big about their ultimate products (**F-5**).

When asked to rank a wide range of current trends and future product possibilities, 74% said they would like to see a split end serum product that is applied to the ends of hair, binding it and giving the consumer more time between haircuts.

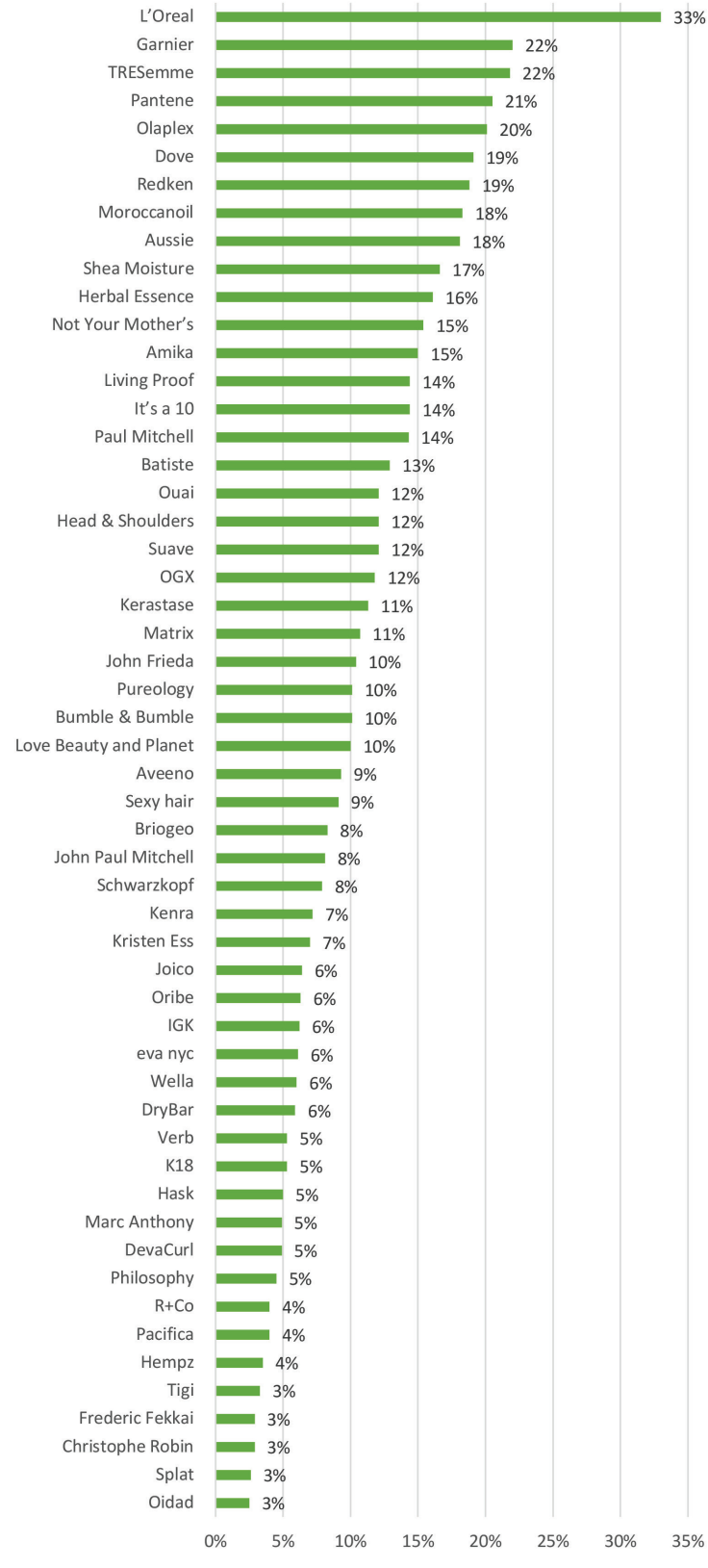
Hair care supplements for healthy hair and scalp (73%) and hair growth boosters (67%) were product types that are highly anticipated for those who don't already take supplements.

Probiotic hair care products that work with one's microbiome were intriguing to 59% of respondents, with hair care products containing SPF (58%), styling products containing SPF (57%) and scalp care products containing SPF (53%) also ranking highly.

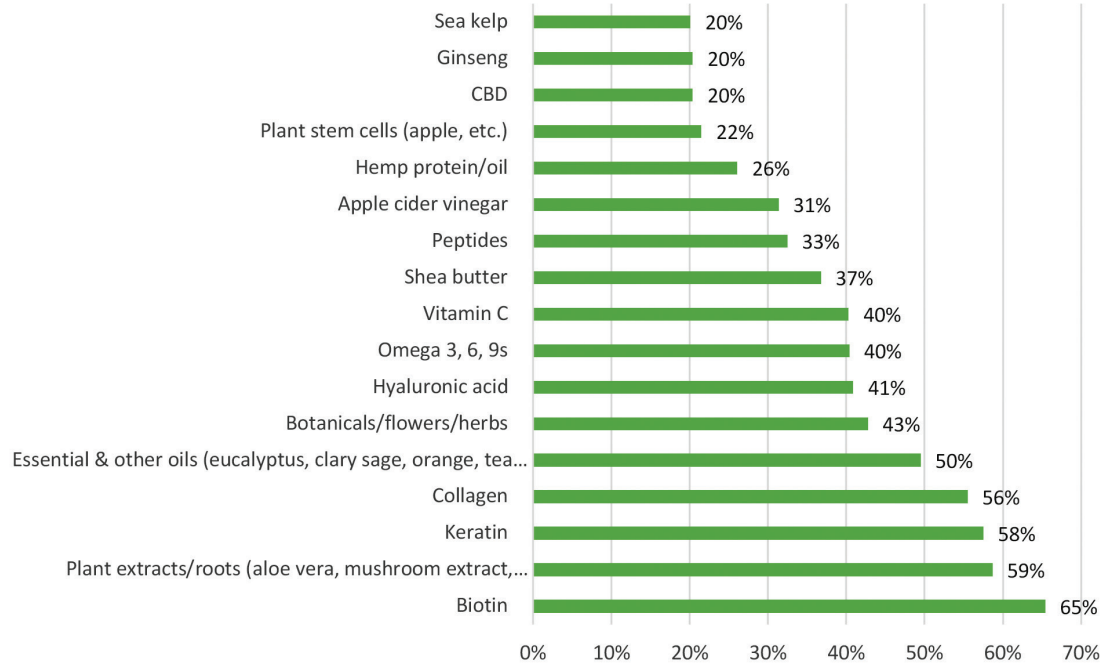
Connecting with the Consumer

It's important to understand where consumers usually first learn about new hair and scalp care products in

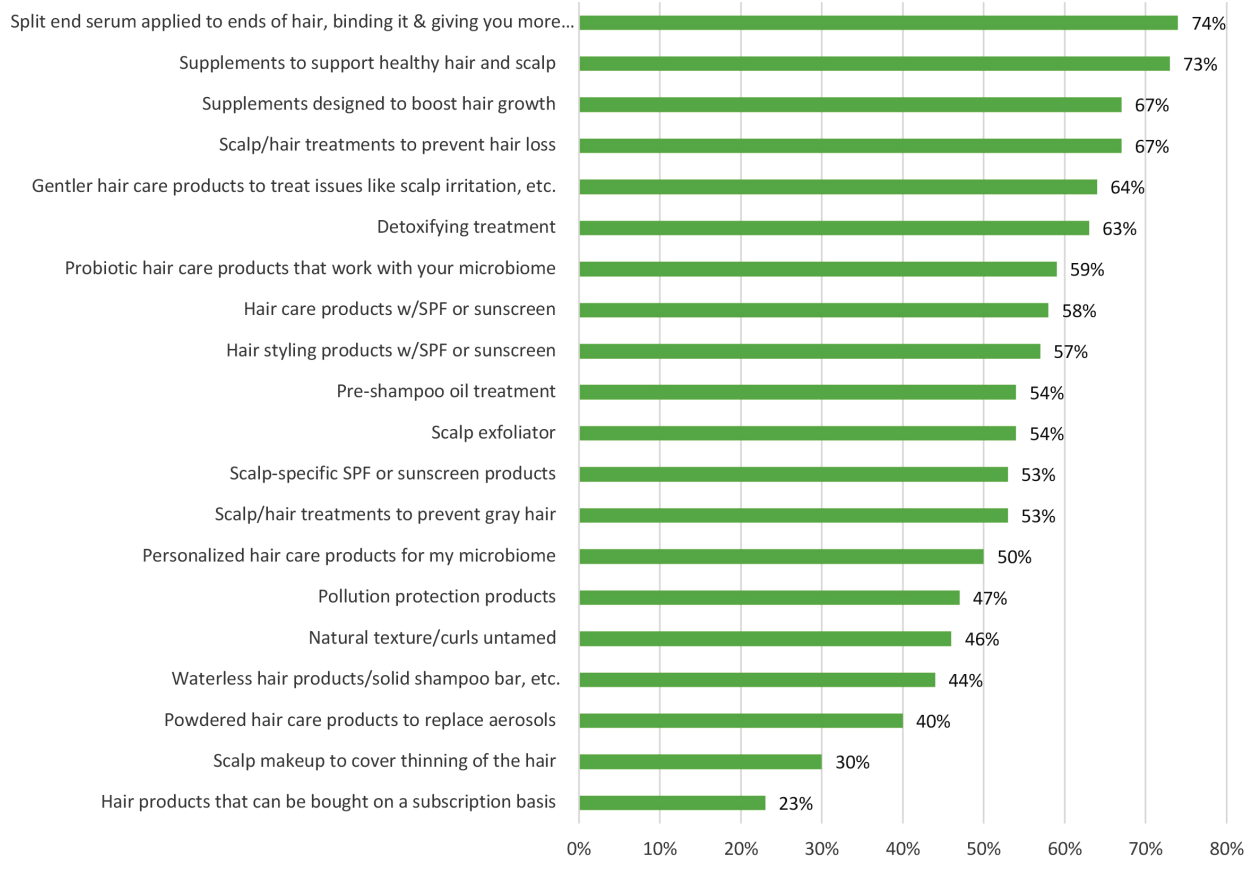
F-3 Top hair care brands purchased



F-4 Ingredients she wants to see in her hair care products



F-5 Trends of interest to consumers



order to introduce them to new SKUs they're actively seeking.

"In a retail store" and through friends and family were in the top five on respondents' lists of where they first learn of new hair care products, but social media is a much stronger mechanism for communicating with the next generation of buyers (**T-5**).

Top Buying Influencers: the Tipping Point

Your new hair care product is close to launch. The checklist has been completed: the new product will solve her hair problem; it contains the ingredients she's looking for; it smells great; it'll be sold where she shops most; and you're ready to market to her where she typically learns about new hair care products.

Other than basic affordability, we asked women about their top influencers when it comes to purchasing an unfamiliar hair care product. What pushes her over the edge to make the buying decision?

First, consumers must see clearly communicated benefit statements on the package—understanding exactly what the product is intending to do or help is important (**T-6**).

Proof of efficacy, in the form of consumer claims from independent studies, clinical claims, and before and after photos, are paramount to her decision to add your new brand to her bathroom shelves. ■



Based in sun-seared San Diego, **DENISE HERICH** is co-founder and managing partner at The Benchmarking Company. The Benchmarking Company provides marketing and strategy professionals in the beauty and personal care industries with need-to-know information about its customers and prospects through custom consumer research studies, focus groups, its annual PinkReport, and consumer beauty product testing for marketing claims.

Want more from this author?

*Check out **Lift & Tuck: Consumer Attitudes Toward Aesthetic Procedures** in our **February 2024 edition.***







Overall, lip makeup was a top performer in the prestige beauty category 2023, per Circana, spiking 31% year-over-year, or twice the rate of the overall category.

Image by Beauty Hero at Adobe Stock

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THE LIP BOOM: BEAUTY x CARE

BY JEB GLEASON-ALLURED, content director, *Global Cosmetic Industry*

Lip makeup was a top performer in the prestige beauty category 2023, per Circana, spiking 31% year-over-year[a], or twice the rate of the overall category.

But in the latest annual sales results, it wasn't lipstick on top. It was actually tinted balms and oils, the latter of which nearly tripled in 2023, pointing to high engagement in multifunctionality and hybridized innovations.

This aligns with Euromonitor data[b] 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 same 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."

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

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



In February 2024, Spate noted that online searches for lip butter balms jumped nearly 70% year-over-year, with key associated ingredients including moisturizing shea butter and cocoa butter.

Image by zigres at Adobe Stock

And, if there was any doubt about the popularity of lip products, Hailey Bieber nearly broke the internet in February 2024 by debuting the Rhode lip case, a silicone phone case with a built-in notch that can hold one of the brand's peptide lip tints, which feature shea butter (we'll be hearing this ingredient call out a lot in the lip category), peptides, cupuaçu and microbiome-friendly babassu.

Butter Balms: Moisturizing & Tinted

In February 2024, Spate[c] noted that online searches for lip butter balms jumped nearly 70% year-over-year, with key associated ingredients including moisturizing shea butter and cocoa butter.

Related claims consumers were searching for included moisture, shine, unscented, conditioning and intensive care, per Spate.

Tinted balm formats either recently launched on the market or recently expanded into new retail channels include Tower 28 Beauty's LipSoftie Hydrating Tinted Lip Treatment Balm featuring that search-term favorite shea butter as well as jojoba oil and lysine, and Summer Fridays' Lip Butter Balm for Hydration & Shine, featuring shea (again) and murumuru seed butters as well as vegan waxes.

[c]www.spate.nyc/beauty

On the plumping end of the spectrum, we have Hourglass' Phantom Volumizing Glossy Lip Balm featuring cooling menthyl lactate and a conditioning complex of emollients and oils.

One interesting launch that calls out ingredients in its name is Charlotte Tilbury's Hyaluronic Happikiss Lipstick Balm featuring hyaluronic acid, C-peptide and emollients.

Lip Oils: Hydration & Cover

Meanwhile, lip oils, another key growth segment called out by Circana data, recently experienced a nearly 28% year over year jump in searches, per Spate data.

Tinted lip oil formats either recently launched on the market or expanded into new retail channels include Summer Fridays' Dream Lip Oil for Moisturizing Sheer Coverage featuring vitamin E and a vegan oil complex; Fenty Skin's Fenty Treatz Hydrating + Strengthening Lip Oil featuring Barbados cherry extract; and Milk Makeup's Kush Hydrating Sheer Lip Oil featuring hemp seed oil, sunflower oil and coconut oil, as well as Japanese camellia seed oil.

Taking inspiration from the lip oil and balm boom, turnkey and packaging manufacturer Cosmopak recently took the hybrid trend one step further with its sheer lip oil balm, which is housed in the company's Ecoforward Metal Slimstick and offers light application and slight laydown of pigments.

Plumping Glosses: Filler Alternatives

It's also important to touch on Plumping Glosses, which have witnessed a number of new introductions.

Denise Herich of The Benchmarking Company recently conducted a survey[d] for our February 2024 issue, which found that 23% of the 4,200 U.S. women surveyed noted they felt their lips were "too thin."

No wonder innovation in plumping concepts is so robust.

Recent plumping launches include: Haus Labs by Lady Gaga's PhD Hybrid Lip Glaze Plumping Gloss featuring prickly pear oil, vegan collagen, and

[d]www.gcimagazine.com/consumers-markets/article/22882695/lift-tuck-consumer-attitudes-toward-aesthetic-procedures





Lip oils recently experienced a nearly 28% year-over-year jump in searches; pictured: Bloss+ by JamieMakeup, a plumping gloss.



IL Cosmetics' vegan Plumping Creamy Matte lipstick brings a different finish to a category typically dominated by glossy, satin and demi-matte effects.

L to R: image by JamieMakeup at Adobe Stock; courtesy of IL Cosmetics







A recent Mintel analysis noted 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; pictured is Caliray's Socal Superbloom Lip + Cheek Tint Soft Stain Blush, which is infused with hyaluronic acid, niacinamide and squalane to add a burst of hydration, reduce inflammation and help retain skin elasticity.

a blend of Sederma's Maxi-Lip and Volulip for visibly fuller lips without the burn.

Maxi Lip reportedly stimulates collagen and hyaluronic acid synthesis. Meanwhile, Sederma's Volulip active is said to plump lips via hyaluronic acid synthesis.

Maxi Lip also shows up in Lawless' Forget The Filler Lip Plumper Line Smoothing Gloss, which also comprises shea butter and hyaluronic acid.

Elsewhere in the plumping gloss category are: NYX Professional Makeup's Duck Plump Extreme Sensation Plumping Gloss, available in 18 shades and featuring spicy ginger oil for an instant and long-term plumping effect, and Patrick Ta's Major Volume Plumping Lip Gloss featuring jojoba oil, peppermint and vitamin E.

Plumping claims are also impacting the lipstick category. To capture the trend, IL Cosmetics' vegan Plumping Creamy Matte lipstick brings a different finish to a category typically dominated by glossy, satin and demi-matte effects.

The formulation comprises the company's Spice N'Hot Technology, featuring two lip-volumizing ingredients—one for tingling sensations and another for hot and spicy sensations.

The ultra-matte, high-pay-off and ultra-light liquid lipstick delivers more than 8 hours of wear, per the company.



Cosmogen used its D16 tube, which contains recycled plastic, for Clarins' Lip Perfector launch.

Multifunctional Lip Products on the Rise

Several launches in the lip sector are notably multifunctional. But why does multifunctionality matter?

A recent Mintel analysis[e] noted 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 formulations may feature skin-friendly materials.

Multifunctionality can also lead to social media fame for brands. For instance, in February 2024, Trendalytics[f] flagged Milk Makeup's Cooling Water Jelly Tint for its TikTok virality. The formulation's texture and pigmentation made it a winner with users on social media. Among its key

[e]www.mintel.com/insights/beauty-and-personal-care/how-colour-cosmetics-brands-can-appeal-to-differenttypes-of-makeup-users

[f]www.trendalytics.co

From top: courtesy of Caliray; Clarins/Cosmogen



There's some interesting cross-category innovation happening in the lip category, as seen with Sacheu Beauty's viral Stay-n-Peel-Off Lip Liner Tattoo.



Shield+Heal pairs lip care with aromachology-inspired scents intended to improve moods and a sense of well-being.



Private label beauty manufacturer Lady Burd has developed Lip Stains that reportedly deliver long-lasting color, gliding on silky-smooth for all day wear and a smudge-proof pout.

ingredients are vegan collagen, aloe and seawater for hydration.

Other multifunctionals in the space include AF94's accessibly priced Playdate Multi-Use Cheek + Lip Color, which reportedly "adds a dreamy wash of Popsicle-stained color wherever you want it most," as well as MadHippie's Cheek & Lip Tint, featuring sea buckthorn, blueberry, and jojoba and shea butter, and Caliray's Socal Superbloom Lip + Cheek Hydrating Soft Stain, featuring hyaluronic acid, niacinamide and squalene.

Recently, Cosmogen used its D16 tube, which contains recycled plastic, for Clarins' Lip Perfector launch. The flocked and beveled applicator is said to be ultra-soft to provide the optimal user experience for this all-in-one lip and cheek balm.

The formulation is designed to glide over the lips, leaving them shiny and sparkling in just one swipe. On the cheeks, it provides a boost of radiance for a natural healthy glow.

Cross-category Inspiration

There's some interesting cross-category innovation happening in the lip category, as seen with Sacheu Beauty's viral Stay-n-Peel-Off Lip Liner Tattoo.

The concept was born out of a 2022 TikTok post from founder Sarah Cheung who used a brow tint to line her lips. In the video, Cheung left the product on for a few minutes, then peeled it off, revealing a distinct and durable line that could then be filled in with a lip color.

That concept has now been converted into a liner that works similarly, with users letting the product sit 10-20 minutes before peeling it away to reveal a durable outline.

The liner, featuring hyaluronic acid and vitamin E, is now launching at Ulta in-store.

Next: Neuro Lips?

Before we depart the lip category to look at new innovation tools, it's worth exploring one perhaps under-leveraged opportunity: neuro lips.

One brand, Shield+Heal, doesn't use tints, but its concepts may be of interest to color cosmetic brands seeking to add a feel-good, neurocosmetic dimension to their product innovation.



Cosmopak's sheer lip oil balm (center) is housed in the company's Ecoforward Metal Slimstick and offes light application and slight laydown of pigments. Its lip gloss (foreground) features skin-friendly ingredients housed in the company's magnetic vial for quick-release—with a pleasing, ASMR-like sound—and easy application. The range's liquid lipstick pen (left/top), meanwhile, is housed in an airtight twist pen design for mess-free and precise, buildable application. The airtight pens are designed to extend the shelf life of products like liquid lipsticks, as well as eyeshadows and concealers. The available brush tips are reportedly easy to clean, while the pen's valve evacuates all product.

From top, L to R: courtesy of Sacheau Beauty; Shield+Heal; Lady Burd; Cosmopak

Shield+Heal pairs lip care with aromachology-inspired scents from Firmenich that are intended to improve moods and a sense of well-being.

The brand's botanical lip balms, which retail at Target and Amazon, feature notes of "fresh watermelon, strawberry, mint, warm sun musk, and crushed violet leaves," offering a "sensory self-care moment that helps soothe and comfort the mind from daily stressors," per the brand.

New Lip Color & Care Concepts: Ingredients, Formulas & Packaging

To tap into the growth of the lip sector, private label beauty manufacturer Lady Burd has developed Lip Stains that reportedly deliver long-lasting color, gliding on silky-smooth for all day wear and a smudge-proof pout.

The company also offers a Sugar Lip Scrub that gently exfoliates, removing dry skin and leaving the lips feeling soft and smooth.

Elsewhere, Cosmopak has developed a color range that includes a lip gloss featuring skin-friendly ingredients housed in the company's magnetic vial for quick-release—with a pleasing, ASMR-like sound—and easy application.

The range's liquid lipstick pen, meanwhile, is housed in an airtight twist pen design for mess-free and precise, buildable application. The airtight pens are designed to extend the shelf life of products like liquid lipsticks, as well as eyeshadows and concealers. The available brush tips are reportedly easy to clean, while the pen's valve evacuates all product.

On the sustainability front, Cosmogen has launched a paper stick (capacity: 45 g) comprising 78% FSC paper for anhydrous formulas such as lipsticks.

Using the company's rotative system, consumers turn the bottom part of the paper stick, thereby lowering the outer tube to reveal the formula inside. The paper stick is recyclable and entirely customizable to fit brand image.

The company also features a 5-ml version of the Paper Stick for lipsticks or lip balms. Comprising up to 77% paper, these 5 ml sticks feature Cosmogen's rotation system, which again consists of rotating the lower part of the tube to reveal the stick formula, without contact with the fingers. The design is reportedly fully customizable and recyclable.

In addition, Cosmogen offers 100% PET or RPET Sticks (capacity: 3.7 g) for all types of wax and/or anhydrous formulas. Designs, which are fully customizable, can feature round or square sections as well as variable diameters and heights. Mini versions are also available.



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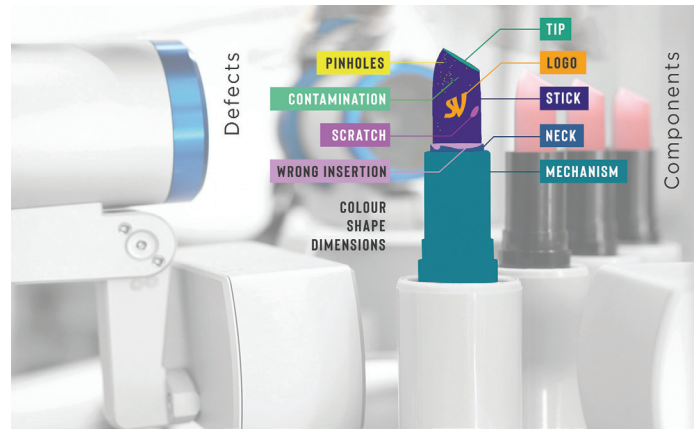


Cosmogen offers a mini lipstick pack ideal for a set of multiple color lipsticks, gifting or sampling.

Courtesy of Cosmogen



Sea Vision, a Marchesini Group company, has developed an AI lipstick vision system in collaboration with its wholly owned AI specialist, Argo Vision.



A-Eye's cameras capture 360-degree images of each lipstick, particularly focusing on the tip. The software analyzes these images to gauge quality and flag defects.

Finally, Cosmogen offers a mini lipstick pack ideal for a set of multiple color lipsticks, gifting or sampling.

Meanwhile, on the ingredient front, Shin-Etsu Silicones of Americas has developed silicone film former technologies for longer wear and comfort to optimize the performance of lip color and foundations, as well as sun care and more.

The technologies reportedly boost product claims such as transfer resistance, color persistence and color shifting, while avoiding drying or discomfort on the lips or skin. With one application, formulations comprising these materials can hold out against sweat and oils.



ProSys' RT tube filling and sealing systems offer automated filling and closing of squeeze tubes. The RT90 variant fills 90 units per minute.

The company's long-wear silicone film former materials include TSPL-30-ID—Silicone Modified Pullulan (INCI: isododecane (and) trimethylsiloxysiylcarbamoyl pullulan), which supports anti-transfer benefits for long wear lip applications due to its oil resistance.

The technology features a larger molecular weight than conventional MQ resins to enhance durability without sacrificing comfort or skin feel, per Shin-Etsu. Siliconization of the pullulan polymer renders this film former permeable to moisture, oil and oxygen to support anti-transfer benefits and skin comfort.

Notably, it reportedly does not require a plasticizer and demonstrates no flaking.

Meanwhile, the company's KF-9021-ID—Trimethylsiloxysilicate (INCI: trimethylsiloxysilicate (and) isododecane), known as MQ resin, creates hard films with improved durability over standard hard type MQs.

The isododecane content of the technology reportedly evaporates to leave behind a film that can improve a formulation's water repellency and resistance. The technology is appropriate for formulations such as makeup, sunscreens, lip color and foundations.

Improving Lip Color Manufacturing

Sea Vision, a Marchesini Group company, has developed an AI lipstick vision system in collaboration with its wholly owned AI specialist, Argo Vision.

The A-Eye system boosts the quality control of lipsticks by tapping proprietary software and algorithms to assess the quality of individual units during the production process.

A-Eye's cameras capture 360-degree images of each lipstick, particularly focusing on the tip. The software analyzes these images to gauge quality and flag defects.

When a defect is detected, the system pings the production machine to reject any defective items.

The automation reportedly replaces time-consuming and complex human-centric quality checks, which can be hampered by the wide variety of product colors, finishes, shapes, formulations and combinations.

The company says the system improves product quality and enhances production performance with its "automatic, real-time

From top: courtesy of Marchesini Group; ProSys

and reliable control over 100% of lipstick production."

The AI tool can be paired with Marchesini/Cosmatic's SM 2000 lipstick molding machine.

On the filling front, ProSys has launched its range of LB semi-automatic hot melt filling lines for lip balms. The filler models include a semi-automatic hot melt filling line to fill, cool and cap lip balm sticks at a machine cycle rate of up to 30 (LB30) or 60 (LB60) parts per minute.

The range features a manual loading station with an angled guide that allows for easy loading, per the company. A quick-change puck mounting system enables tool-less changeovers among different sizes.

Both LB models offer puck tooling that fits most 0.15-ounce 500 style lip balm tubes, including those used by Inpres, Federal, CCP and Sapona.

An on-board cap sortation station features a gravity cap track to present caps for the auto capping station and the positive cap sap station ensures caps are pressed on completely.

The company also offers the RT tube filling and sealing systems that offer automated filling and closing of squeeze tubes. The system uses hot air tube sealing and reportedly works with all plastic and laminate tubes.

The RT 60 model is a medium-speed unit that offers automated filling and closing of up to 70 squeeze tubes per minute, per the company.

The RT 90 is a high-speed unit that can fill up to 90 tubes per minute.

Both units include a tube bulk bin, load ramp, orient, fill station and closure stations for plastic, laminate or aluminum tubes.

ProSys' ProTrac high-speed fully automated system for filling and closing squeeze tubes is available in models that can fill from 140 to 220 tubes per minute.

The system features twin-head, fully automatic tube filling and closing, as well as tube bulk storage and feed, dual load stations, dual orient stations, dual servo fill stations and dual closure stations. ■



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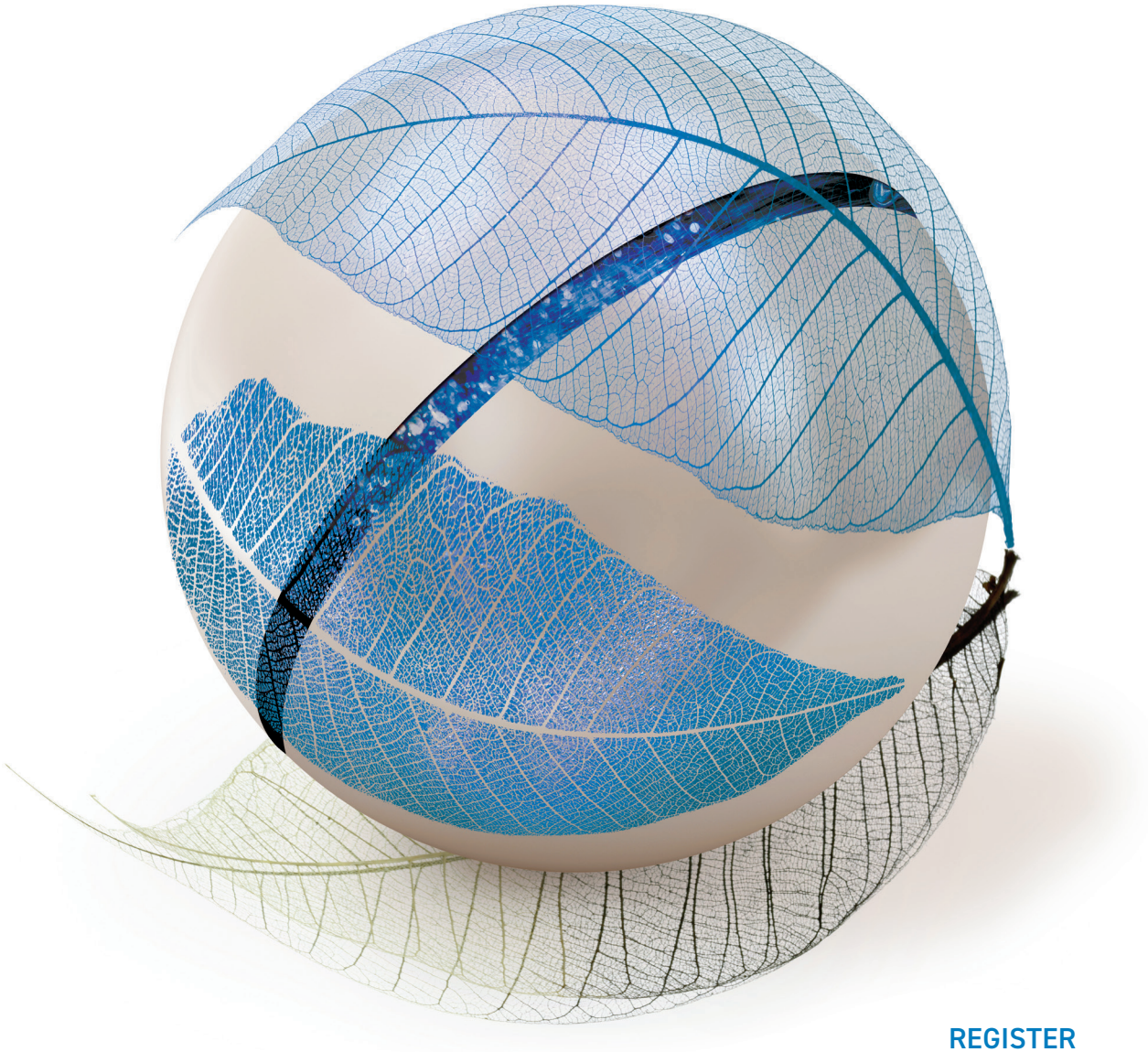
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