JULY/AUGUST 2024

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Beauty's 8 Top Growth Areas

The headlines in the most recent reporting period pointed to slowing growth for beauty[a], though the category was far more robust than any of its consumer product peers.

Digging into the numbers, it's clear that every sector, even the softening makeup space, has robust growth opportunities.



Prestige hair product sales in Q1 2024 was led by products offering solutions for hair thinning and loss, as well as wellness-oriented SKUs such as hair oils and serums, scalp care, and heat protectants. All of those categories grew sales between 13% and 25% in Q1, per Circana.

1. ***Sets top scents:*** Fragrance gift sets grew by 22% in Q1 2024, per Circana, faster than juices, and gained market share in the category, while travel size sets, including discovery sets, grew at double the rate of traditional full-size sets.
2. ***Fragrance$:*** Luxury fragrance units sold paced at more than double the rate of the rest of the prestige market in Q1 2024.
3. ***Pucker up:*** Amid soft makeup sales in Q1, lip makeup led the pack, with dollar sales up 26%. Top performers included tinted lip balms and lip oils.
4. ***Body-centric:*** While skin care results were strong in Q1, body sprays were a standout, with sales nearly tripling since Q1 2023.
5. ***Clinical is going nowhere:*** Face serums were the second-strongest grower in the skin care category, per Circana, driven by clinical brand launches. This is in line with an ongoing trend toward expert-backed, dermatologist- driven skin care.
6. ***Hair wellness dominates:*** Prestige hair product sales in Q1 2024 were led by products offering solutions for hair thinning and loss, as well as wellness-oriented SKUs such as hair oils and serums, scalp care, and heat protectants. All of those categories grew sales between 13% and 25% in Q1, per Circana.
7. ***At-home trumps pro beauty:*** In a recent analysis, Circana's Sally Lyons Wyatt noted[b] that while consumers continue beauty spending, they are making sacrifices: "[I]nstead of paying higher salon prices, consumers are doing their nails and hair at home more frequently." Perhaps for this reason, salon hair care brands were the top sales contributor to the prestige hair sector (that said, celebrity hair brands grew the fastest, up 64%).
8. ***Unstoppable Gen Alpha:*** We simply cannot forget about the "Sephora kids." Per Circana, Gen Alpha continues to drive prestige sales among households earning more than $100,000, with kids' households growing at twice the rate of households with no children. Notably, the firm explained, "spending per buyer was directly influenced by the presence of children: among households with children, the average spending per buyer in Q1 increased at five-times the rate as those without children."

[a]www.circana.com/intelligence/press-releases/2024/us-beauty-industry-sales-slow-but-continue-to-grow-in-q1-circana-reports/

[b]www.circana.com/intelligence/blog/2024/lessons-for-cpgs-and-retailers-how-inflation-is-changing-consumer-behavior/

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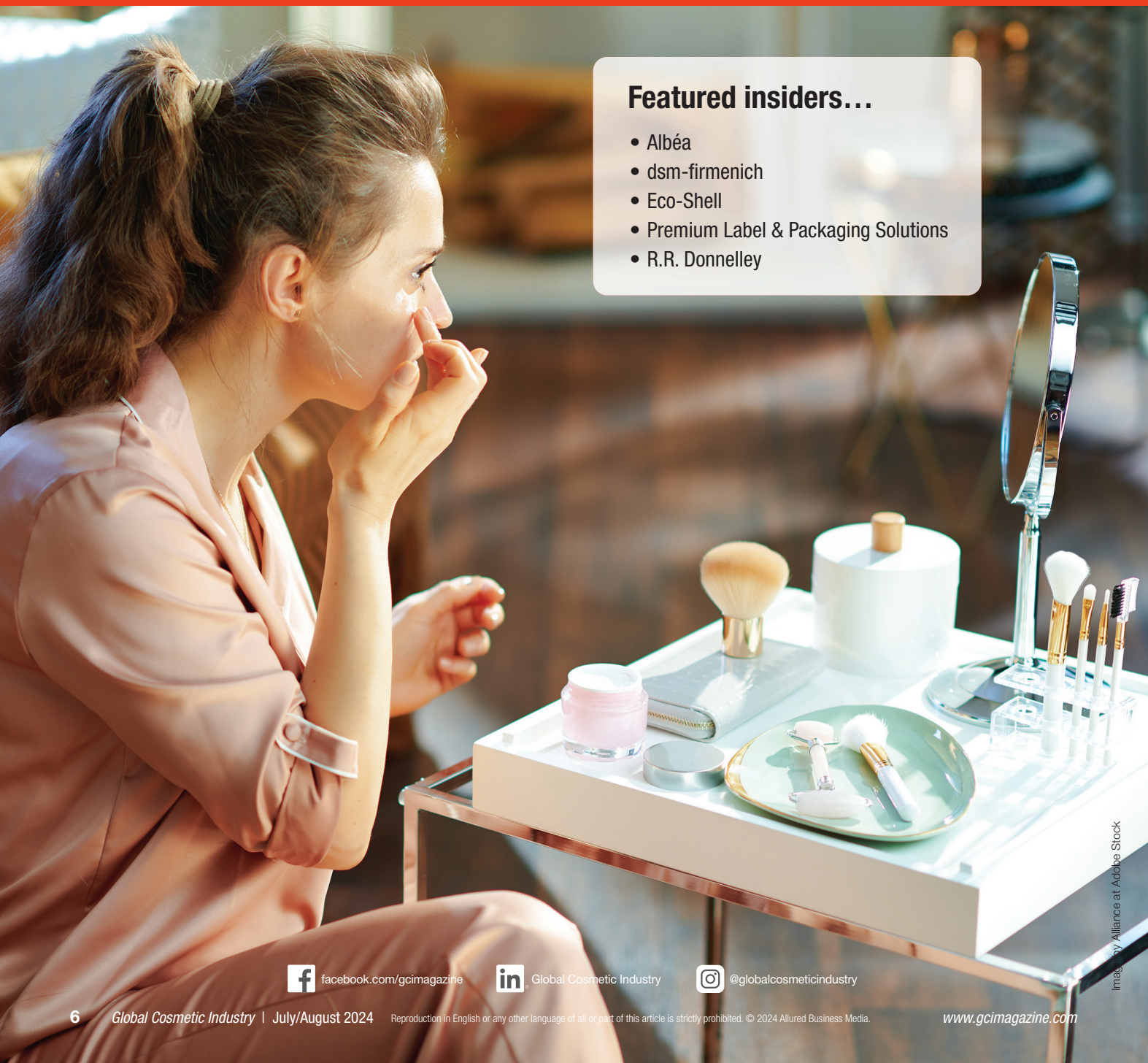
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INSIDER INSIGHTS:
PACKAGING FOR BEAUTY | SKIN CARE LAUNCHES + TRENDS

This month we delve into the diverse skin care and packaging for beauty categories.



Featured insiders…

- Albéa
- dsm-firmenich
- Eco-Shell
- Premium Label & Packaging Solutions
- R.R. Donnelley

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PACKAGING FOR BEAUTY LAUNCHES + TRENDS

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

Sustainability continues to be at the forefront of packaging for beauty launches.



Packaging for beauty continues to focus on sustainable practices.

Sustainability

Caroline Hughes, marketing manager, Albéa Tubes, says, "Sustainability has become an integral part of any new product development project. For tubes, this translates into different trends: the use of PE in caps to allow their recyclability, the integration of post-consumer recycled (PCR) both in sleeves and caps and, of course, the reduction of plastic use illustrated by the Ecotop solutions. We also see the rise of the inclusivity trend through universal design. This leads us to consider new aspects in the product development: the tactility with textured effects on the tubes, the sound via digital applications, the sight with eye catching effects and innovative decoration options. Finally, the design itself should be easy to open, close and hold for all consumers."

Aline Roland, marketing and communication director, Albéa Cosmetics & Fragrance, says, "In this global sustainability perspective to reduce waste and prolong product life, we notice a growing demand from brands for packaging solutions that are designed to last longer by being refillable or reusable—like cosmetic jars but also compacts and lipsticks. Today more than ever, packaging needs to combine sustainability, aesthetics, emotions and functionality while allowing differentiation and brand recognition—a huge challenge."

Hughes adds, "This year we have introduced a range of recycling-ready caps made in America such as the HDPE Basic & Classic caps and the Fez flip-top caps that enable the complete tube to be made with mono HDPE materials. We have also extended our range of low-profile caps for the North American market with the new PP Slight Cap available in combination with extruded tubes. Designed with a reduced height and a strong eco-look, this cap provides 17% weight reduction compared to a standard flip-top cap."

Roland adds, "As a part of our North America Collection, we have presented our innovative and refillable jar, Twirl, that offers consumers a completely new gesture for an easy refill. We have also

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Albéa's HDPE Basic & Classic caps and Fez flip-top caps enable the tube to be made with mono HDPE materials.



Premium Label & Packaging Solutions created the shrink sleeve for the Vault Bronzer by Devoted Creations.

launched the Curl's Collection, a range of brushes designed to bring volume and care to lashes. The range includes diverse fiber types—including cotton—and integrates up to 60% PCR content."

Brian Techter, president, packaging, R.R. Donnelley, says, "Customer preferences and trending aesthetics in the beauty industry directly impact the packaging and labels of products. We've seen growing interest in 'quiet luxury' and ;sophisticated simplicity' that translates into packaging with clean, understated visuals as focus shifts towards brands emphasizing quality and functionality. However, per Mintel's 2024 Global Beauty and Personal Care Trends Report, consumers are not only looking for quality, but also personal care products that align with their values, including wellness and environmental consciousness. We're increasingly seeing retailers consider reusability, refillability and recyclability for product packaging. Refillable packaging often requires more durable labels to withstand longer periods of repeated use. Durable labels can endure frequent exposure to water and humidity, or friction from constant use, and remain intact to inform consumers about ingredients and instructions. Apart from attracting and informing consumers, packaging also plays a vital role in protecting the product and ingredient integrity."

Techter continues, "RRD focuses on not only amplifying our abilities in the beauty space, but also innovatively supporting our clients. We recently worked with a global skin care, fragrance and cosmetics company to enhance its in-store experience with luxurious and elegant in-store displays and signage. Our team worked closely with the company to develop displays that are aesthetically pleasing and constructed without the use of clear poly filler, corrugated fluting, plastic tapes, or foam board to align with the company's sustainability goals. This partnership was successfully executed thanks to RRD's global network of experienced design, manufacturing and distribution experts."

Techter concludes, "In April, we also announced the expansion of our label capacity to enhance efficiency and support the e-commerce needs across industries, including the beauty space. This expansion comes in response to a booming e-commerce market which, according to Statista, is expected to grow 53% in the U.S. between 2024 and 2029, with expectations to surpass $1 trillion U.S. dollars. We're seeing both big beauty retailers, as well as more niche beauty brands, have a growing e-commerce presence like never before. Virtual and physical shelves remain competitive, and folding carton packaging and labels can help brands stand out and bring their vision to life."

Pattern Packaging

Leslie Gurland, vice president of sales and marketing at Premium Label & Packaging Solutions, says, "The newly launched Vault Bronzer by Devoted Creations is a tanning oil that locks in color so tans last longer. The packaging mimics the appearance of an actual vault and was achieved with a combination of several printing techniques. The label is an excellent example of 2024's pattern packaging trend, featuring a herringbone and repeat pyramid pattern to trick the eye into seeing a texture where none exists. Premium Label & Packaging Solutions (PLPS) accomplished the look of the shrink sleeve by strategically placing silver cold foil and black, white and silver ink."

Hyper-personalization

Techter says, "Another trend we're seeing is the hyper-personalization of products. Brands are continuing to introduce options for customers to become involved in tailoring products for their individual needs, say through a custom hair care regimen or a specialized vitamin packet. With this trend comes a need for tailored packaging and labels, as many brands look to include customer details in their packaging to create another specialized touchpoint in hopes of instilling a lasting brand impression." ■

L to R: courtesy of Albéa; Premium Label & Packaging Solutions

TRENDING: SKIN CARE 2024

Biological Aging

Kara Keene, marketing communications, DSM-Firmenich, says, "As the consumers' focus shifts from anti-aging' to well-aging, products that enhance [the] skin's cellular processes and reduce biological age are gaining prominence. 'Biological age' is becoming the new buzzword. While chronological aging is inevitable, biological aging can be slowed or even reversed by addressing root causes like stress, poor lifestyle and environmental aggressors. We can address this trend through senolytic science."

Keene adds, "Senolytics is a groundbreaking category of compounds that target senescent cells, often referred to as 'zombie cells,' to address the fundamental sources of skin aging. Senolytics work on cellular level, providing a universal solution for all skin types, ethnicity, gender and age, promoting smoothness, wrinkle reduction and enhanced elasticity. This comprehensive approach represents a new frontier in skin care, providing a multifaceted solution that goes beyond traditional anti-aging strategies."

Keene continues, "Eterwell Youth, in-cosmetics Global 2024 Best Active Ingredient Gold Award winner, NYSCC Maverick Ingredient Award winner and CEW Beauty Award Finalist, is a true senolytic solution that works at the cellular level to revert skin damage induced by zombie cells, reversing skin appearance by six years after two weeks, and nine years in just three months (for the first time, full substantiation in vitro, ex vivo and in vivo). Powered by senolytics science and 100% of natural origin, is our holistic well-aging sustainable solution that selectively targets destructive zombie cells to properly remove them, re-boosting the natural skin processes and promoting healthy-looking skin. It is proudly Cosmos, Natrue organic and Fair for Life fair trade certified."



According to insiders, "biological age" has become a new buzzword in the industry.

Sustainability

Helen Cantrell, director of sales and marketing, Eco-Shell, says, "One trend that we're seeing is increased consumer demand for sustainable and eco-friendly products. Nowadays, consumers are continuously looking for ways to cut back on their own personal emissions and choosing sustainable products to care for their skin on a daily basis is one way they can achieve this."

Benefit-Specific

Cantrell adds, "Another trend we're seeing is the demand for products to offer clear, specific benefits. Consumers are consistently looking for products that best fit their needs, like anti-aging and wrinkle reducing benefits. Just as everyone's skin has different needs, skin care products should reflect that. For example, walnut shells from Eco-Shell contain polyphenols, so skin products that feature walnut shells could tout antioxidant and anti-inflammatory benefits." ■

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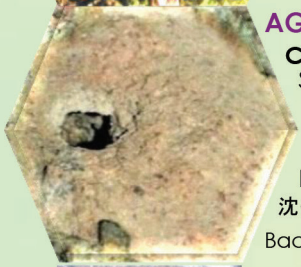
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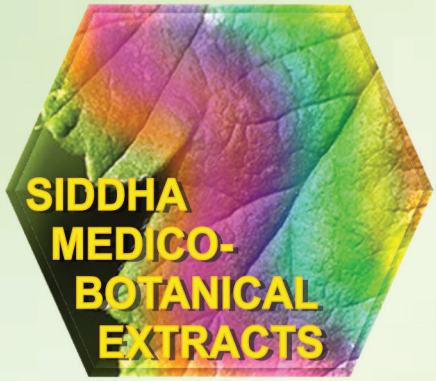
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Green 绿 Red Deep 深红 Ultra Sky Blue 天蓝
White Pearlescent 珍珠白 Red Light 浅红
Dark Ultra Brilliant Yellow 深黄 Yellow Light 浅黄
Dark Black 黑

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

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

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

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This 100% natural and organic solution works at the cellular level to revert skin damage induced by zombie cells, reversing skin appearance by nine years in three months with +200% elimination of senescent cells in 48 hours. Universal solution for all skin types, ethnicities, genders, ages. in-Cosmetics 2024 Gold Active Award.

Images courtesy of the manufacturers



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HCP Packaging
www.hcpackaging.com/inspiration/twist-tottle-unique-ergonomic-tottle-innovation-2/

The Twist Tottle 30 ml is a clever new stock packaging design that enables one-handed dispensing via a twist gesture for the application of liquid cosmetics and skin care products such as sunscreen, foundation, primer and serum. The Twist Tottle is portable and refillable and customizable with HCP's industry-leading finishes.





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Campo THSI Plant Collagen
Campo Research
www.campo-research.com/

Campo THSI Plant Collagen (INCI: Hydrolyzed Collagen) is a 100% vegetal extract of undenatured botanical collagen. The molecular structure of phyto-tropocollagen consists of a triple helix of three polypeptide chains, each itself helically coiled and maintained by hydrogen bonding supplemented with some covalent bonds.



THE STORE BRANDS PHENOMENON 2024

EMPOWERING THE RETAIL INDUSTRY

The “phenomenon” continues. Store brands’ powerful growth in mainstream retail last year, which produced record sales of $236B and broad expansion in other channels, such as big box and department stores, specialty chains, club stores, dollar stores, and online, is showing no signs of slowing down.

In fact, beauty is a developing category for private brands, increasing 11% dollar and unit share in 2023. Catering to multigenerational consumers, retailers are introducing innovative store brand beauty and self-care products from around the world to meet consumers’ specific needs.

For more than 40 years, PLMA’s Private Label Trade Show has provided retailers, distributors, wholesalers, and other visitors a source of innovation for thousands of products on display including cosmetics, premium skin & sun care, hair care, men’s grooming, beauty accessories, oral care, gender & age specific personal care, ingredients, elevated fragrances, and sustainable and clean packaging. For information visit plma.com or email info@plma.com.

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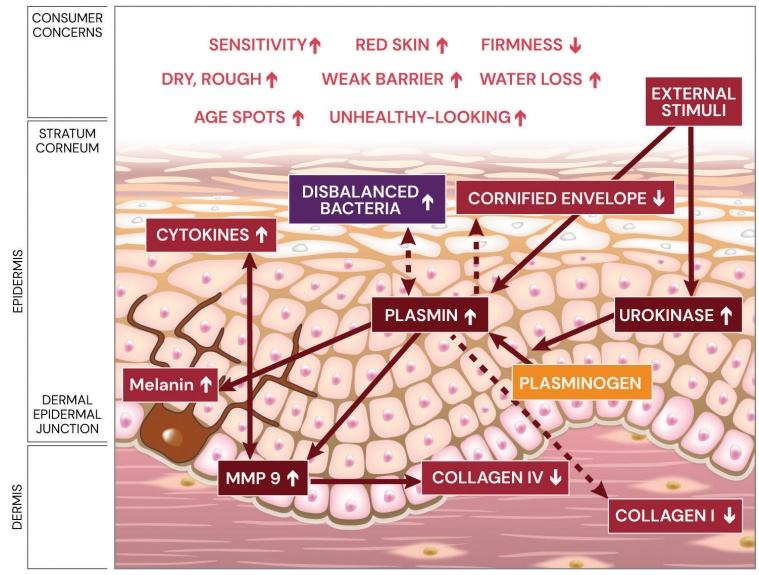
Presented by the Private Label Manufacturers Association

REAWAKEN THE SKIN'S POTENTIAL!

BY DR. REMO CAMPICHE, Senior Lead Scientist and DR. VOLKER ROSENBERGER, Global Marketing Manager, Skin Care, dsm-firmenich

SPONSORED BY dsm-firmenich

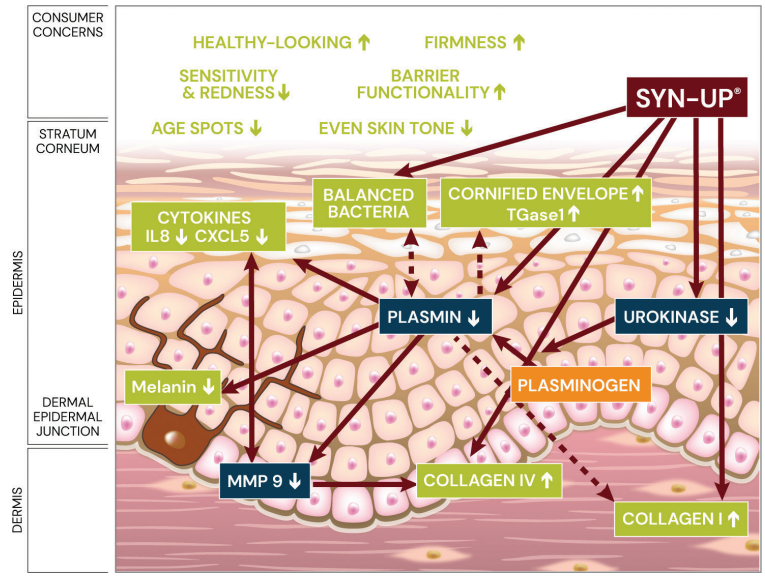
As the lines between beauty care and a sense of wellness become ever more blurred, the world of skin care is seeing a fundamental shift. Today's consumers realize that beautiful skin starts with healthy skin and are taking more holistic approaches. Often, these extend beyond the individual to consider the health of the planet as well. And as part of this overall trend, the conversation around mature skin is changing completely too. Today, it's no longer about "anti-ageing", but about being proactive and "ageing well" – by protecting the skin and slowing down signs of skin ageing by targeting their root causes.



High plasmin levels trigger a chain of unwanted effects in the skin.

Resilience is key

For skin to look and feel as good as it can throughout life, it needs to be resilient. Holistic epidermal health, addressed by our CORNEOCARE™ scientific platform[1], is essential to this because it only takes one component of the skin ecosystem to become imbalanced for the complexion to suffer. Take the example of the enzyme plasmin, which is widely present in the epidermis. Plasmin levels can often go into overdrive in response to external stressors such as UV irradiation, weather, and pollution. Over time, this can affect skin functionality and resilience and trigger a whole chain of damage, causing the skin to lose vitality and firmness and become fragile, dry, and prone to sensitivity. The end result? Unhealthy-looking skin that's even more prone to visible effects of skin stressors, including signs of skin ageing like fine lines and age spots.



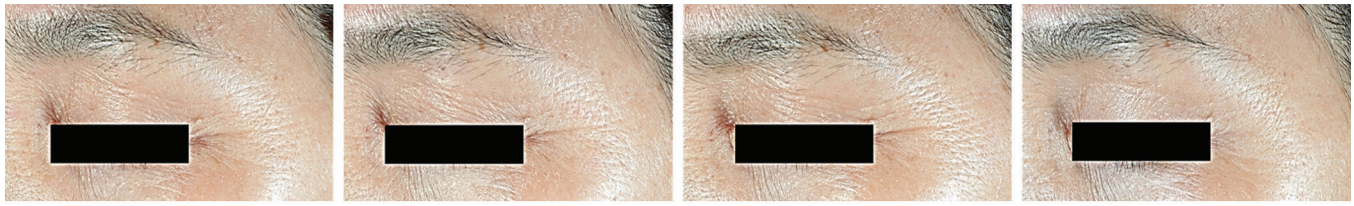
When plasmin levels are kept in check, there is a beneficial effect across all skin layers.

One ingredient, multiple benefits

Targeting plasmin levels in the epidermis can have a positive effect across all skin layers and it was with this goal in mind that dsm-firmenich designed its smart dipeptide SYN-UP®. Selected using rational design and molecular modelling to accurately predict its mode of action, SYN-UP® is also developed with green chemistry to respect the environment.

It is proven to rebalance levels of plasmin and its activator, Urokinase, in vitro[2]. Keeping these levels in check strengthens skin barrier function, reduces skin sensitivity and redness, promotes a healthy-looking complexion, helps to smooth and firm the skin and promotes a more even skin tone and helps reduce age spots.

Images courtesy of dsm-firmenich



Twice daily application of 1% SYN-UP™ significantly reduced wrinkle volume on the crow's feet.

Driving improvement across all skin layers

Rigorous in vitro testing shows how SYN-UP® can drive improvement across all skin layers:

- By inhibiting Plasmin activity by 60%* and Urokinase activity by 97%*, it helps promote healthy looking skin.
- By up-regulating Transglutaminase 1 (TGase1), it helps strengthen the skin barrier.
- By modulating MMP 9, CXCL5 and IL-8 activities, it helps improve skin sensitivity and reduce redness.
- By preventing degradation of type IV Collagen and stimulating type I Collagen, it helps to smooth and firm the skin.
- By down-regulating melanin synthesis, it helps promote a more even skin tone and helps reduce age spots.

The skin barrier and beyond

To look its best, and protect against conditions like redness and dryness, the skin needs a strong barrier. So to keep that important outermost layer as resilient as possible, we need to make sure that essential bacteria in the skin microbiome are in balance.

At the right levels, Staphylococcus Epidermidis and Corynebacterium kroppenstedtii both play a key role in healthy looking skin.

In our, in vivo study, we've found that SYN-UP® resets their levels, helping to provide the optimal conditions for a reinforced skin barrier.

A visible reduction in the appearance of wrinkles and age spots

So, does this peptide's in vitro performance translate to visible results in vivo?

A 28-day, placebo-controlled human study confirmed that SYN-UP® can boost skin resilience and lower transepidermal water loss (TEWL) in Caucasian skin, reducing skin dryness and sensitivity[3]. Now, having established that SYN-UP® can prevent degradation of type IV Collagen, stimulate type I Collagen and down-regulate melanin synthesis in vitro and ex-vivo, scientists at dsm-firmenich have conducted a new human study[4].

The volunteers for this placebo-controlled study were all Chinese females aged 40 to 65 years with visible wrinkles on the forehead and crow's feet and at least one obvious age spot. Subjects applied either a formulation containing 1% SYN-UP® or a placebo formulation on the full face twice-daily for 56 consecutive days. Wrinkle volume and the size and darkness of age spots were measured on days 0, 14, 28, and 56.

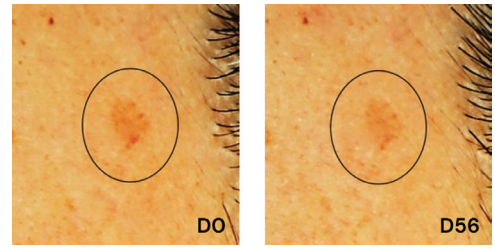
For subjects who applied the SYN-UP® formulation, the results were highly significant compared to the placebo group:

When it came to the crow's feet, the reduction in wrinkle volume was noticeable and after eight weeks (day 56), a reduction of 10% was recorded.

And when it came to age spots, these were 9% lighter and 6% smaller at day 14 and up to 26% lighter and 12% smaller after eight weeks (day 56).

Maximize skin's potential at every age

Skin care today is about empowering consumers to be the best version of themselves, whatever their age. And one way to do this is with solutions that increase skin resilience and promote a long-term, healthy-looking complexion at the same time as targeting visible signs of skin ageing.



Age spots were noticeably lighter and smaller.

With its proven action on plasmin, mitigating the negative visible effects of external skin stressors, SYN-UP® is a smart solution for keeping skin looking healthy for longer. It improves skin barrier function, helps combat skin dryness, sensitivity, and redness, promotes an even skin tone and protects against collagen degradation, leaving skin looking smoother and firmer.

As it is developed with green chemistry, SYN-UP® is also a relevant solution in the holistic beauty space–meeting the needs of consumers looking for ingredients that work with their own skin to boost their natural beauty but that also respect the environment.

** Compared to control*

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The uptick in prestige skin care sales comes at a time when brands are tapping clinically effective ingredients, holistic wellness concepts and more.

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WHAT'S DRIVING THE PRESTIGE SKIN CARE BOOM?

A potent blend of wellness, Gen Alpha shopping habits, emerging high-efficacy ingredients and professionally inspired beauty are creating significant growth opportunities.

U.S. prestige skin care dollar sales increased 10% in Q1 2024, per Circana, while mass skin care grew just 4%[a].

Notably, the number of prestige buyers, their average spend and purchase frequency all increased.

This mass-prestige divergence is markedly deeper than 2023, when the sectors grew at 11% and 14% respectively.

Undeniably, lower-income shoppers, who lean toward mass beauty, are either trading down on products or delaying purchases they may view as purely elective. This is not an issue facing counterparts in upper income households (more on that in a moment).

So, beyond economic challenges, what's behind prestige skin care's dominance and where are the growth opportunities?

Body Sprays Dominate Skin Care

Body spray was the top gainer in the skin care category in Q1 2024 overall, with sales nearly tripling since the same period 2023.

This mirrors a 24% year-over-year increase in online searches for skin care body sprays and mists as of April 2024.

This growth aligns with a similar rise in fragrance body sprays, a segment that nearly tripled in 2023.

In March 2024, Circana's Jacquelyn Wenskus reported[b], "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. 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."

The Power of Clinical Serums

Meanwhile, face serums were the second-strongest grower in the skin care category in Q1, driven by clinical brand launches. This result reflects a general rise in clinical, expert-backed brands[c], a trend that continues from 2023.

Recent launches in the facial serum

[a]That was enough to make skin care the mass sector's fastest-growing category in Q1 2024; www.circana.com/solutions/complete-beauty/

[b]www.circana.com/intelligence/blog/2024/splurge-and-save-the-fragrance-edition/

[c]www.gcimagazine.com/brands-products/skin-care/article/22874671/beauty-enters-its-dermatological-skin-care-era



Forty-four percent of all U.S. adults with children of any age had purchased skin care, perfume, makeup and/or hair care in the previous three months. However, 46% of parents with children ages 6-11 had purchased skin care in the previous three months, reflecting higher engagement.

Image by Prostock-studio at Adobe Stock

category include The Ordinary's Niacinamide 10% + Zinc 1% Oil Control Serum, Youth To The People's Superfood Skin Drip Smooth + Glow Barrier Serum with Kale + Niacinamide, Dr. Jart+'s Brightamin Brightening Serum with Niacinamide and Vitamin C, and Kinship's Dreamwave 2% Bio-Retinoid Complex Overnight Serum.

Approaching Gen Alpha Responsibly

Nascent beauty shoppers are a massive prestige skin care market opportunity, but shepherding kids into the beauty space requires ethical practices.

"Millennials are the most engaged generation when it comes to skin care," Circana's Jennifer Famiano reported[d] in May 2024. In particular, households with incomes above $100,000 and with children in the household have boosted their skin care spend by 10% and purchase frequency by 15% in the first two months of 2024.

"The number of [prestige skin care] buyers also significantly increased year-over-year," Famiano added, noting that Gen Alpha shoppers are "motivated by the thrill of the acquisition," which explains why mass skin care sales for this group only rose 2% in the first two months of 2024.

In April 2024, CivicScience dug into consumer data[e] to decode Gen Alpha's impact on beauty. While the firm will not survey individuals younger than 13, it was able to compare parents of children aged 6-11 to the parents of older generations (similar to Circana's methodology).

Household comparisons are striking. Forty-four percent of all U.S. adults with children of any age had purchased skin care, perfume, makeup and/or hair care in the previous three months. However, 46% of parents with children ages 6-11 had purchased skin care in the previous three months, reflecting higher engagement.

As reflected in Famiano's analysis, CivicScience found that Gen Alpha households are 6% more brand-sensitive than their peers and often engage in categories more than their counterparts.

Their favorite skin-oriented brands included Sol de Janeiro, Rare Beauty, Drunk Elephant, Bubble, Glow Recipe and Summer Fridays. CivicScience added, "[I]t's worth noting that parents with younger children (aged 6-11) are more likely to have purchased from all the brands surveyed (except Summer Fridays) than parents with Gen Z tweens and teens (ages 12-17)."

However, Famiano signaled a need for industry responsibility, concluding her analysis by saying, "Developing appropriate products, continued education and positive engagement will be necessary focus areas."

Famiano reflected well-founded concerns about very young consumers adopting, for instance, high-intensity skin care featuring harsh ingredients that are inappropriate (and unnecessary) for young skin.

Earlier this year, Swedish retailer Apotek Hjärtat made headlines for refusing to sell anti-aging products to those younger than 15, reflecting growing anxieties about the "Sephora kid" effect.

Then, in May 2024, California's legislature put forth rulemaking to "prohibit the sale or delivery to a person under 13 years of age of an over-the-counter skin care product or cosmetic product advertised to address skin aging that contains vitamin A or its derivatives or an alpha hydroxy acid [AHA], and would require an entity that conducts business in California to take specified any of several specified actions to ensure that the purchaser of an above-described product is not under 13 years of age."

Key ingredients under the regulation would include AHA and vitamin A, as mentioned, as well as retinoids and retinol, glycolic acid, ascorbic acid (vitamin C), citric acid, and other related materials.

Moving forward, skin care brands will need to focus on positive messaging to emerging consumers while avoiding popularizing inappropriate and harsh products for developing skin.



Clarins' New Multi-Active day and night range (launched in March 2024) was formulated to address premature aging associated with stress and lack of sleep and to restore a youthful radiance, per the brand.

Courtesy of Clarins

[d]www.circana.com/intelligence/blog/2024/gen-alphas-skincare-effect/

[e]https://civicscience.com/how-gen-alphas-parents-are-shaping-the-beauty-industry/

The Intersection of Skin & Wellness: Stress x Sleep x Care

There's no shortage of lifestyle articles, social media posts and podcasts addressing the twin (and often interrelated) issues of stress and sleep disorders.

Skin care has long been associated with self-care, even before that term came into popular usage, and has long been a key component of overnight rituals.

But a new generation of research, brands, ingredients and products are taking the intersection of skin wellness and well-being to new levels.

"Stress levels are … at an all-time high, prompting consumers to seek integrative solutions that address both their physical and mental health simultaneously," says Michelle Chavez, vice president of innovation, Accupac/Cobalt Labs.

As a result, she explains, "Beauty products will innovate with ingredients that target specific wellness needs. Formulations will feature adaptogens, renowned for their stress-relieving and balancing properties."

Adaptogenic, stress-mitigating beauty SKUs on the market include Moon Juice's ingestible Brain Dust Adaptogens for Focus, Provence Beauty's No Baggage Adaptogen Eye Cream, Florence by Mills' Surfing Under The Eyes Hydrating Treatment Gel Pads and Undefined Beauty's R&R Sun Crème SPF 50 Moisturizer.

But adaptogens aren't the only stress-focused strategy on the market. For instance, Clarins' New Multi-Active day and night range (launched in March 2024) was formulated to address premature aging associated with stress and lack of sleep and to restore a youthful radiance, per the brand.

The formulations comprise ingredients such as 2% niacinamide to smooth the appearance of fine lines and skin texture, as well as sea holly extract, which boosts the skin's moisture barrier.



"Stress levels are … at an all-time high, prompting consumers to seek integrative solutions that address both their physical and mental health simultaneously," says Michelle Chavez, vice president of innovation, Accupac/Cobalt Labs.

Other key materials include organic teasel extract to boost the skin's glow, organic strawberry tree fruit extract for tightened pores and boosted glow; moisturizing and plumping betaine; a tetrapeptide to firm the skin overnight (night cream); and Clarins' anti-pollution/-blue light complex featuring organic white horehound, *Furcellaria* algae and nipplewort extracts.

Meanwhile, says Chavez, "Sleep, a cornerstone of both physical and mental well-being, will take center stage [in skin care], with product launches focusing on optimizing natural biorhythms to promote restorative, reparative sleep and improve mood. Sleep is fundamental to ensure all the processes of our body are working as they should. It will be tracked, hacked and optimized. Products will also utilize magnesium for its calming effects and melatonin to help promote deeper, more restful sleep. Products will sync with our natural circadian rhythms and expand across the categories with more launches for hair care, body care, lash care, lip care and even fragrance to repair, reset and refresh overnight."

Brands playing in this space include circadian-focused launches like Indeed Labs' In-Circadian Night Mask with Polyglutamic Acid, Andalou Naturals' Age Defying Rejuvenating Plant Based Retinol Alternative Sleeping Mask, and The Golden Rule's Retinoid/Retinol Serum. Meanwhile, launches featuring sleep-focused materials include Lemme Sleep's Sleep Tight Gummies, The Good Patch's Nite Nite Hemp-Infused Wellness Patch, Moon Juice's Magnesi-Om Sleep and Relaxation Supplement, Pacifica's Wake Up Beautiful Retinoid Eye Cream, and Dr Teal's Soothe & Sleep with Lavender Pure Epsom Salt Soaking Solution.

"The connection between mental and physical health will be further explored, with psychodermatology and neuro beauty delving into how emotions impact skin health and aging, harnessing the power of mood-boosting ingredients like nootropics," says Chavez. "Meanwhile, nutrient-dense

Image by Valerii Apetroaiei at Adobe Stock

formulations containing vitamins, minerals and micronutrients will nourish the skin while supporting overall wellness."

Chavez concludes, "Formats will evolve to enhance the sensory experience, with luxurious and indulgent textures, while ingredients like adaptogens, essential oils and micronutrients will offer functional benefits beyond traditional skin care and supportive of restorative sleep and body balance. Ultimately, the goal of these innovations is to empower individuals to live better, longer, and more fulfilling lives by prioritizing their wellbeing in every aspect of their daily and nightly routine."

Accupac's development department, Cobalt Labs, recently created a proof-of-concept for wellness-focused skin care, a Lavender Intensive Sleeping Lip Mask. The formulation was designed to repair and protect the lips for smoother, softer skin. The mask comprises PHA, shea butter, ceramides and hyaluronic acid for hydration and skin barrier support.

Bio-Botanica, meanwhile, has tackled another growing wellness x skin care opportunity: menopause. The company recently developed a concept formulation, Anti-aging Cream with Puresterol and Superfruit Blend, which takes a multifunctional approach to menopausal care.

The formulation comprises Bio-Botanica's Puresterol, a standardized *Pueraria mirifica* extract featuring isoflavonoids (20 mg/100 g) and miroestrol (300 mcg/100 g).

Miroestrol reportedly relieves menopausal symptoms, including collagenase activity, which can break down collagen and elastin, potentially leading to wrinkle formation.

It also is said to improve the appearance of hair and boost "overall vitality."

Meanwhile, the cream's Superfruit Blend features goji, acai, noni, pomegranate, mangosteen, coffee seed and green tea leaf.

Combined, the blend provides an antioxidant boost to the skin.



Bio-Botanica has tackled another growing wellness x skin care opportunity: menopause. The company recently developed a concept formulation, Anti-aging Cream with Puresterol and Superfruit Blend, which takes a multifunctional approach to menopausal care.

The formulation reportedly diminishes the depth of crow's feet, among other benefits, per Bio-Botanica.

The Professional-Consumer Skin Care Feedback Loop

While professionally dispensed skin care may differ from typical retail skin care in terms of ingredient intensity, the trends impacting both channels are continuously feeding into one another. A recent Kline+ Company report[f] by Sai Swaroop recently looked at the trends shaping the medical dispensing skin care market, revealing strong overlap with the mainstream consumer product space.

For instance, Swaroop notes that the rise of sophisticated diagnostics, which can be used in tandem with topical products (or even generate product recommendations), has created more targeted consumer experiences. In addition, shoppers in both the medical and mainstream skin care space increasingly seek gentler anti-aging solutions—without sacrificing efficacy.

Gentle solutions have impacted shopper demands in acne care, another active-intensive skin care category.

"To effectively treat acne, formulations typically employ adjuvants alongside active ingredients like salicylic acid," says Vince Gruber, Ph.D., of Vantage Personal Care & Beauty. "These ancillary ingredients help formulations where more than just acne is considered as in the case of sensitive skin."

He adds, "When not done carefully, treating acne can be an aggressive process for the skin, stripping the epidermis of its natural oils and causing added sensitivity."

To address these issues, Vantage developed Curazelic 44 (INCI: azelaic acid (and) cocamidopropyl dimethylamine), a "presolubilzed form of azelaic acid that works synergistically with active ingredients like salicylic acid to improve the formula's overall efficacy," per Gruber, thereby "helping to counteract the irritating and drying influences salicylic acid has on the skin."

[f]https://klinegroup.com/where-should-marketers-pivot-to-succeed-in-the-medical-dispensing-skin-care-space/

Image by Anna Zhuk at Adobe Stock

Gruber adds, "Our team found that topical addition of salicylic acid at 1% and 2% ... increases the inflammatory response caused by *C. acnes*, as measured with various markers known to be associated with skin inflammation. By adding 5-10% of Curazelic 44, the combined treatment can help mitigate the inflammatory effects of the salicylic acid. Meaning, the addition of Curazelic 44 in combination with salicylic acid can help reduce the redness and irritation associated with such acne treatments. This combination may also help to improve a subsequent condition to acne lesions known as hyperpigmentation, a darkening that occurs around acne lesions, which happens commonly in individuals with darker skin suffering from acne-prone and troubled skin conditions."

"As an easier-to-use form of azelaic acid, Curazelic 44 remains stable throughout the shelf life of the product, remaining clear where other ingredients create a yellowish appearance in a cream or serum," adds Beto Pino, vice president, technical marketing and innovation, personal care, at Vantage Specialty Chemicals. "Additionally, Curazelic 44 can easily be incorporated into formulations 'as is' without an extra dispersion step and is the only azelaic acid ingredient available on the market in liquid form."



Cost-effective treatments such as the use of lasers can address multiple concerns simultaneously for a comparatively low price.

Pino adds, "With nearly all generations, including Gen X, millennials and Gen Z, citing acne as a main concern in our 2,500-person consumer study, addressing acne is a targeted, multi-step process that must consider the consumer's skin needs holistically."



"To effectively treat acne, formulations typically employ adjuvants alongside active ingredients like salicylic acid," says Vince Gruber, Ph.D., of Vantage Personal Care & Beauty. "These ancillary ingredients help formulations where more than just acne is considered as in the case of sensitive skin."

Per Gruber, "[A]cne/breakouts are the third largest concern among all generations included in [the] concept survey."

Beto notes, "Our goal is to develop solutions that balance effectiveness in formulation as well as nurture the skin. We have developed a complete skin regimen that includes cleansing, treating, nourishing, and correcting by using ingredients that are gentle yet efficacious. This strategy increases the chance of repeated use to achieve clear skin quickly and for an extended period."

Meanwhile, Swaroop concludes his analysis by arguing that brands seeking to meet consumer demands in the medically dispensed skin care space must tap into diagnostics and data-driven insights, while offering education on dermatological principles and ingredients.

The author also points out the rise of cost-effective treatments such as the use of lasers, which can address multiple concerns simultaneously for a comparatively low price. This trend is most prominent among younger shoppers, creating a brand opportunity to produce consumer channel skin care that mimics pricey professional treatments.

From top: images by Mariakray; SHOTPRIME STUDIO at Adobe Stock

"Consumers are looking for safer, cost-effective DIY treatments that mimic the effects of professional treatments," says Siti Kahlid, president and CEO of TaikiUSA. "To meet this demand, TaikiUSA has developed a new microneedle lip patch formulated with cutting-edge ingredients that is designed to provide a non-invasive and revitalizing solution to achieve a plumper pout."

TaikiUSA's Pro-Aging & Plumping Microneedle Patch contains dissolvable microneedles that gently penetrate the skin, per the manufacturer, enhancing ingredient absorption.

Kahlid notes, "The advanced formula stimulates blood flow, creating a plumping effect, aids in collagen production, and diminishes the appearance of fine lines and wrinkles."

She adds, "Skin care beyond the face (body care) and, more specifically, feminine wellness treatments are becoming more popular among consumers. To keep up with the demand, TaikiUSA has developed a feminine wellness collection that includes masks, patches and wet wipes. The collection is formulated with science-backed ingredients that meet retailer clean standards and restore skin in the most intimate areas. Our hydrogel patches and masks are specifically designed to stay put once applied and enhance the natural beauty of the feminine form, targeting the buttocks, breasts and belly. This collection offers a non-invasive approach to enhancing natural beauty."

TaikiUSA's hydrogel Booty Booster Sculpting Patch, for instance, is designed to promote firmness, reduce the look of cellulite and increase hydration, while its hydrogel Breast Toning Patches are formulated to tone, plump and improve skin elasticity. Finally, the Moisturizing Belly Mask treatment was created to reduce the appearance of stretch marks and improve firmness.

Elsewhere, SeaCliff has developed a range of custom packaging-integrated beauty tools to "complement and elevate" at-home cosmetic topical treatments. These tools feature phototherapy, RF, microcurrent and other FDA-approved technologies allowing brands to, in combination with efficacious formulas, allow consumers to optimize their results at home.



SeaCliff has developed a range of custom packaging-integrated beauty tools featuring phototherapy, RF, microcurrent and other FDA-approved technologies.



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TaikiUSA's hydrogel Booty Booster Sculpting Patch is designed to promote firmness, reduce the look of cellulite and increase hydration.

SeaCliff's beauty devices are integrated directly into packaging for seamless application, per the company. Brands can also pair the solutions with apps to, for instance, remind consumers when it's time for formulas to be replenished or select tool modalities based on personalized needs.

As these examples show, the lines between consumers' at-home experience and professional beauty treatments are blurring, offering opportunities for both channels.

Ingredient-forward Skin Care Innovation

In an age of clinical, expert-backed brands and a consumer obsession around efficacy, ingredients mean more than ever.

Among the skin care ingredients with the highest total U.S. online searches, according to a Spate x Grant Industries report from April 2024, are hyaluronic and glycolic acid, tretinoin, snail mucin (also among the fastest-growing ingredient keywords), salicylic acid, castor oil, and ceramides. Among

From top: courtesy of SeaCliff; TaikiUSA

the fastest-growing ingredient search terms are phenols (reflecting interest in peels), maracuja (popularized by Tarte and others), heartleaf and red bean (both inspired by K-beauty), plum oil (popularized by Le Prunier), kojic acid (reflecting melasma worries), rice water (a "glass skin" favorite), and salt water (often associated with skin-friendly cleansers).

Here, we looked at how a few of the top-trending ingredients are manifesting in new technologies, concepts and launches.

Vitamin C Inspiration

"We've found our clients are loving Vitamin C, bakuchiol, niacinamide and tranexamic acid lately," says Samantha Burd of contract manufacturer Lady Burd Cosmetics.

That's no surprise given that, per the Spate x Grant Industries report, vitamin C and niacinamide, respectively, generate 736.3K and 178.7K monthly online searches in the United States.

Burd notes, "These ingredients encourage real results that our clients love. In summer 2024, we're looking to launch some new, exciting products, including a pumpkin enzyme mask, an essence a vitamin C+ lactic night cream, a spray tan water and more!"

TaikiUSA has also taken inspiration from the popularity of vitamin C, but with a twist. Its Bōshi Beauty Inc. has unveiled its new Vitamin C Nano Drop Antioxidant Power technology, which reportedly boosts the stability and efficacy of vitamin C.

The Bōshi technology comprises nanofiber layers that protect vitamin C from degradation, resulting in antioxidant activity that is 4x more powerful than a traditional vitamin C serum, according to initial DPPH assay results cited by TaikiUSA/Bōshi. All Bōshi Nano Drops can be customized with different formulas, shapes and packaging.

Prejuvenating Peptides

The Spate x Grant Industries report cited earlier also found that monthly online U.S. searches for peptides had grown more than 20% year-over-year, totaling 92.3K. Polypeptide searches spiked even more drastically, growing 160.1% year-over-year to a still modest 12.6K. No doubt these technologies have captured the public's attention.

Recent peptide launches include LipoTrue's SP[AI]^3 for acne-prone skin; Clariant's retinol alternative CycloRetin, which comprises the cyclic peptide heterophyllin B; and Lubrizol Life Science's scalp microbiome-balancing Fensebiome.



TaikiUSA has taken inspiration from the popularity of vitamin C, but with a twist. Its Bōshi Beauty Inc. has unveiled its new Vitamin C Nano Drop Antioxidant Power technology, which reportedly boosts the stability and efficacy of vitamin C.

Courtesy of TaikiUSA

Allison Garlet, marketing manager bioactives at BASF, notes that Gen Z's interest in preventative beauty, or prejuvenation, encourages the adoption of "science-first" approaches. So too does the rising interest in general in skin and hair longevity.

"Peptides are sensible ingredients to answer these trends," says Garlet, "as they are known to consumers as high-performing ingredients with proven benefits … These proteins are the foundations of your skin and are responsible for its texture, strength and resilience. Without peptides, skin is less intact, which can lead to a loss of firmness, the appearance of wrinkles, a change in texture and less 'bounce.'"

Peptides allow beauty brands to help consumers "bio-hack" the skin, Garlet explains, thereby "supporting longevity and encouraging skin to look and act younger." These materials' benefits support product claims for anti-aging, soothing, radiance-boosting, hydration and more.

Among the peptides released by BASF are Replexium, a skin-bioavailable complex of two synthetic peptides that addresses the appearance of wrinkles and fine lines, as well as Peptovitae Matrix, a biomimetic synthetic peptide encapsulated in a double-layered liposome for improved skin bioavailability to visibly lift the skin while rendering it more supple-looking by supporting the skin's own healthy collagen and elastin levels. Peptovitae Matrix can also reportedly protect against oxidative stress to counteract premature aging.

Other peptide tech from the company includes Proteasyl, a polypeptidic ingredient that acts as a protease inhibitor that defends against aging conditions while improving elasticity and tone, as well as soothing and hydrating PeptAide4.0, which reduces dryness, comforts irritated skin and supports firm skin.

Skin Care's Premiumized Opportunity

From wellness-oriented launches to high-efficacy technical ingredients, the skin care sector has ample opportunity to continue growth in the prestige space. With Gen Alpha already familiarizing itself with more premium brands, the future looks bright. ■

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AND WE'RE JUST
GETTING STARTED.



The transition toward "clean," sustainable and vegan formulations hasn't been linear; despite this, high-functioning alternatives continue to proliferate.

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‘CLEAN’ BEAUTY SWAPS: NEW INGREDIENTS & HEADWINDS

How quickly is the beauty industry swapping out ingredients that some flag as “problematic”? It depends.

For instance, a Kline + Company report[a] noted that, while cyclic silicones are generally being “formulated out of skin care,” their performance has made them more difficult to replace in AP/deo applications. The report concludes that, “Despite sustainable and 2030 agendas and targets, the industry has been looking at costs first, resulting in a slower replacement [of ‘problematic’ ingredients] than previously expected.”

Those cost concerns could linger, the report notes, because persistently high personal care ingredient costs have been sustained due to expenses such as logistics, labor and energy.

That said, microplastics and traceability regulations, along with negative consumer attitudes toward some synthetic materials, will still generally push the industry toward so-called “clean” and sustainable alternatives over the long term.

The push toward vegan products can also have roadblocks. Around the time of the Kline report’s release, Glossier delighted and infuriated its customers (depending who you asked) by bringing back the original, non-vegan Balm Dot Com formulation. The move was due to popular demand.

In February 2023, Glossier had announced that its popular balm was going vegan, featuring castor jelly, synthetic beeswax, shea butter and safflower oil. In reverting to its original formula (which remains cruelty-free), the brand brought back sheep’s wool-derived lanolin and natural beeswax (as well as castor oil), proving that emollients truly do matter.

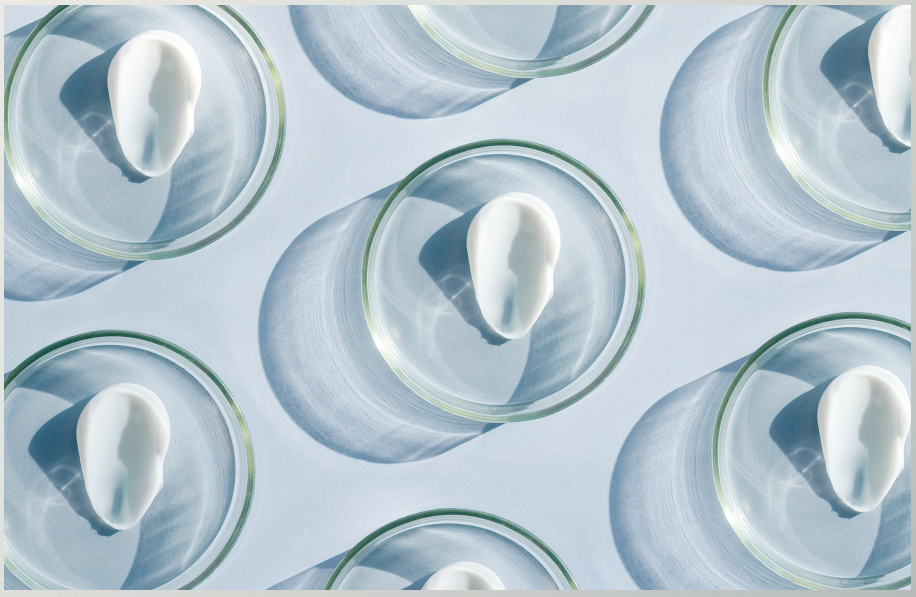
While some commenters on Instagram shared sentiments such as “sad day for Glossier and the animal community,” there was strong support for the switch, with one poster noting, “GOOD. Because I just tossed all my nasty vegan ones.”

Ultimately, this switch came down to performance; Glossier consumers don’t appear hostile to vegan formulas, per se, but they demand the sensory attributes they expect without concessions.

As the Glossier news shows, efficacy has taken center stage, shifting attention from some of the vaguer “clean” claims seen in the past to more substantial efficacy evidence and performance-first mindsets. But these concepts don’t necessarily need to be in conflict.

At the 2024 NYSCC Suppliers’ Day event, Symrise recently highlighted this evolution with a focus on “Elevated Efficacy” that paired safe, sustainable ingredients with heightened efficacy profiles.

Focused on “supercharged ingredients … backed by clinical testing” and an overall “science-first



Clean and sustainable ingredient swaps have been slowed in some cases by cost and supply factors, as well as consumer preference on performance.

Image by Екатерина Клищевник at Adobe Stock

[a]https://klinegroup.com/articles/2024-and-beyond-where-does-the-personal-care-ingredients-market-currently-stand-and-where-is-it-headed/

approach to skin care," the company presented concepts highlighting a trio of on-trend materials.

These included SymCalmin Avena (INCI: maltodextrin (and) *Avena sativa* (oat) kernel extract), which reduces redness and itchiness in just minutes, and HydroViton Insta (*Cucumis sativus* (cucumber) fruit extract (and) pentylene glycol (and) sodium benzoate (and) lactic acid), which offers a no-needle hydration "tweakment" for fresh, dewy skin and a boosted skin barrier (via boosted filaggrin production). The multi-level moisturizer reportedly improves cell renewal while enhancing natural moisturizing factors. It also is said to enhance production of hyaluronic acid.

New Clean & Sustainable Ingredient Swaps

Despite any headwinds for the evolution of the beauty industry's palette and formulations, a wide range of suppliers have launched alternatives to a number of conventional technologies—many with unique or enhanced functionality and efficacy.

Amazonian Film Former & Silicone Alternative

Apoena Biotech's Apobio Film is a multifunctional, biofilm-forming postbiotic product with moisturizing/TEWL-preventing properties for hair and skin care.

On hair, the technology forms a protective film on the hair surface, as shown in SEM-FEG images (featured here), which retains moisture within the hair, prolonging hydration and preventing dryness.

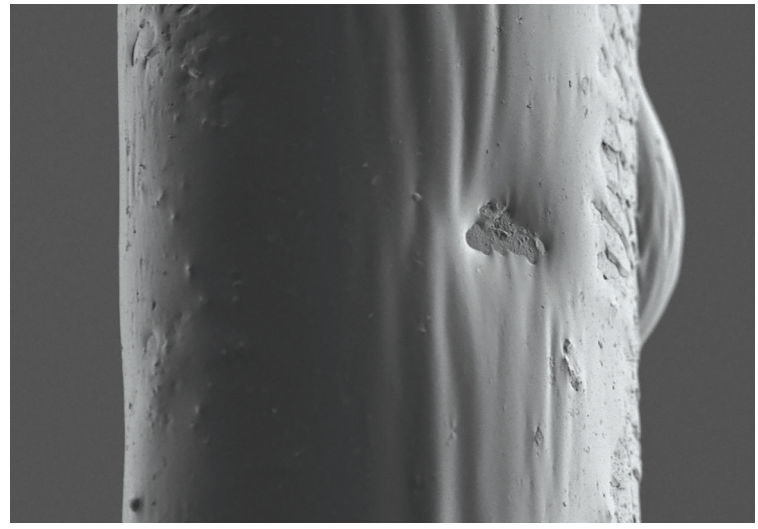
The technology is produced from the fermentation of polysaccharide- and fructooligosaccharide-rich probiotic bacteria.

According to Apoena Biotech, Apobio Film boosts anti-drying efficacy by 30% compared to a control group. This silicone-like effect, however, also manages to avoid buildup.

On the skin, Apobio Film protects the skin's barrier, boosts water retention



At the 2024 NYSCC Suppliers' Day event, Symrise recently highlighted "Elevated Efficacy" that paired safe, sustainable ingredients with heightened efficacy profiles.



On hair, Apoena Biotech's technology forms a protective film on the hair surface, as shown in SEM-FEG images (featured here), which retains moisture within the hair, prolonging hydration and preventing dryness.

From top: courtesy of Symrise; Apoena Biotech

within cells and provides instant hydration, per the company.

One study found that the ingredient boosted hydration by 58% and cut skin water loss by 15%. The result is immediate substantial hydration that lasts as much as 72 hours, per the company.

Apobio Film also reduces oiliness via a 66.7% reduction in the expression of the enzyme 5-α-reductase.

The ingredient is initially being launched in the U.S. and European markets, with an introduction in South America and beyond to follow.

A Gentle Retinol Alternative

Sabinsa's latest skin care ingredient, Babchiol (INCI: bakuchiol) is extracted from *Psoralea corylifolia* and acts as a gentle retinol alternative, offering the same anti-aging benefits without the risk of adverse effects. The company, which debuted the product at the New York Society of Cosmetic Chemists (NYSCC) Suppliers' Day in May 2024, is standardized for a minimum of 99% bakuchiol, per Sabinsa.

A Silky-smooth Biodegradable Polymer

Ingredion's Farmal AF 1100 is a non-GMO, aluminum-free modified starch offering a silky smooth, dry-to-the-touch finish to a range of formulations. Its benefits include increased viscosity and emulsion stability, light-scattering effects for soft-focus finishes, oil absorption for reduced tackiness and greasiness, and enhanced pigment dispersion. The technology is a derived natural material per ISO 16128 and is applicable in sunscreens, deodorants, lotions, dry shampoo, color cosmetics and aerosolized products.

Silicone Alternative Emollient

Recently, Roelmi HPC has expanded its emollient offerings with the EMotion range, which features sensory and performance benefits, as well as sustainable credentials.

Among its offerings is the Ultra-light EMotion Air, which reportedly functions as a silicone alternative. It features a light touch, long playtime



NatraFusion SL HA can be used as a co-surfactant to deliver synergistic mildness and cleanse-boosting benefits with no detrimental impact on foam production, per Croda.

Image by LIGHTFIELD STUDIOS at Adobe Stock



and high spreadability, per Roelmi HPC, functioning similarly to cyclopentasiloxane. The emollient is recommended for hair care and other cosmetic categories.

The range also includes:

- The nourishing EMotion Glow, upcycled from olive oil fractions, provides non-sticky textures and functions as a dispersant for makeup.
- The biomimetic EMotion Skin comprises triglycerides and diglycerides upcycled from olive oil by-products. Critically, it helps active ingredients absorb efficiently into the epidermis layer.
- EMotion Light, meanwhile, is derived from green chemistry processes, per the company, offering a dry and light touch as well as good solubilization of organic UV filters. It can also disperse pigments for matte effects in makeup.
- The EMotion Silky, also obtained by green chemistry processes, features a velvet touch and high spreadability while also offering strong solubility for organic UV filters. In makeup, it reportedly imparts a soft and silky after-feel.

Biotech Surfactant Alternative

Croda's NatraFusion SL HA is a mild sophorolipid biosurfactant produced via biotechnology that acts as an alternative to conventional surfactant chemistries.

The ingredient technology can be used as a co-surfactant to deliver synergistic mildness and cleanse-boosting benefits with no detrimental impact on foam production, per Croda.

During Suppliers' Day 2024, Croda presented a gentle facial cleansing gel concept ingredient featuring NatraFusion SL HA. The low-foam gel was formulated to cleanse the skin gently and effectively.

Nature-inspired Biodegradable Pigments & Glitters

Cambridge-based Sparxell is using industrial machinery and plant-based cellulose to replicate the vibrant colors found in nature.

The company accomplishes these features by mimicking the effects of the arrangements of cellulose chains in, for instance, the cell walls of fruits. The company is now developing these plant-based, biodegradable colors on a commercial scale.

By manipulating the microscopic structural textures of cellulose, the company is producing brilliantly shiny plastic-, titania- and mica-free materials, including pigment powders, pearls and glitter in a range of colors and sizes.

Applicable in personal care and cosmetics formulations, these ingredients "have highly reflective photonic properties," per the company, which can "reflect striking structural colors that are fade-resistant" and which are applicable in the "same contexts as conventional pigments, glitters and sequins."



Micro Powders' NatureGel MC750 is a semi-solid anhydrous gel based on Naturecel 750 for mattifying and soft-focus effects; pictured at NYSCC's Supplier's Day. Unique all-natural-solid anhydrous gel based on Naturecel 750 for mattifying and soft focus



Offering a luxury effect in formulations, Applechem's Stellathix is reportedly 10 times more potent than conventional mass market shampoo thickeners.

From top: courtesy of Micro Powders; Applechem

Biodegradable Polymer Alternative

Lygos, Inc.'s Soltellus line of biodegradable, multifunctional, customizable and sustainable polymers for hair and skin care formulations debuted at NYSCC Suppliers' Day in May 2024. The range offers alternatives to non-biodegradable polymers used in current personal care formulations.

In hair care, Soltellus polymers can enhance softness, smoothness, shine and wet compatibility, producing healthier and moisturized-looking hair, per the company.

In skin care, as a co-surfactant, they ensure a stable, rich, creamy foam and lather that's easy to spread, per Lygos, resulting in a deeper, more thorough removal of dirt, oil and impurities.

As an emulsifier, the polymers can improve user experience with a smoother application and luxurious after-feel, preserving formulation quality while leaving skin hydrated without any residue, per the company.

An Enhanced Talc Replacement

Micro Powders' Naturecel 793 is a biodegradable and micro-plastic-free talc replacement that reportedly functions as a filler while creating a fresh natural look with blurring/soft focus PMMA-like aesthetics.

This cellulose acetate-based powder has worldwide regulatory approval, per the company, and can be applied in pressed and loose powders, color cosmetics, hot pours, and emulsion systems.

Per Micro Powders, 100% of 15 participants taking part in a blind test claimed to prefer the feel of Naturecel 793 over talc.

Biodegradable Surfactant Thickener for Mass Beauty

Applechem's Stellathix (sorbeth-230 pentastearate (and) cocamide MEA) is a star-shaped polymeric thickener designed for sulfated and sulfate-free surfactants in mass market cleansing formulations.

Offering a luxury effect in formulations, Stellathix is reportedly 10 times more potent than conventional mass market shampoo thickeners.

It also has 10-15x more thickening efficiency compared to common low-cost thickeners, per Applechem, and 2x or 3x more powerful than advanced non-ionic thickeners used in challenging sulfate-free surfactant systems.

Notably, Stellathix reportedly maintains cleansing formulations' stability even when adding challenging ingredients. Furthermore, it is classified as Ultimately Biodegradable per ISO 14851 standards, nor is it considered a microplastic according to new EU environmental regulations.

Clean Beauty Friendly Exfoliants

Micro Powders' Naturebead White H20 is a spherical 20-mesh white exfoliant that can add a visual cue or gentle exfoliation in formulations, per the supplier. The ingredient comprises only hydrogenated castor oil, providing a clean-beauty-friendly INCI without any added pigments, dyes or synthetic colorants.

Naturescrub H80, meanwhile, is a naturally derived irregular exfoliant based on sustainable SuCCESS hydrogenated castor oil. This 80-mesh scrub is reportedly optimal for facial, lip and other sensitive areas targeted for exfoliation.

New Ingredient Innovations

Beyond clean and high-functioning swaps, ingredient suppliers recently launched new technologies at in-cosmetics Global in Paris and NYSCC's Suppliers' Day in New York.

Multifunctional, Multisensory Sun Care

While many suppliers at in-cosmetics Global and NYSCC's Suppliers' Day highlighted individual ingredients, DSM-Firmenich underscored new concepts via Sunsense3, a range of sun care concepts that pairs UV defense with inclusive formulations that delivered easy-to-spread, velvety-smooth



DSM-Firmenich's recent sun care concepts included the pineapple-scented Fun in the Sun.



DSM-Firmenich's Fresh Sun Lotion Cooling Effect Fluid Lotion 50+ featured cooling via a combination of its Seaside Oxygen Infusion fragrance and FreezeBlast technology.

textures and invisible finishes, along with emotion-based scents.

Among the formulations was the Fresh Sun Lotion Cooling Effect Fluid Lotion 50+, featuring hydrating Pentavitin and cooling via a combination of DSM-Firmenich's Seaside Oxygen Infusion fragrance and FreezeBlast technology. The lotion also featured a complex of five of the company's Parsol UV filters.

DSM-Firmenich also developed the Green Sun—High Protection Fluid Lotion SPF 50+ featuring the Parsol complex plus Pentavitin, skin barrier defending Alpaflor Edelweiss CB, complexion illuminating Tilamar PDO and Nøøvista, a preservative

Courtesy of dsm-firmenich

booster, skin humectant, sensory enhancer, solvent and actives carrier.

The Energizing Sport—Sun Cream SPF 50, meanwhile included Alpaflor Edelweiss CB and the Parsol complex, while the Energizing Extreme Sport—Sun Cream & Odor Control SPF 50 featured the Parsol complex and an odor control technology, DeodEclyx R.

Other formulations included the pineapple-scented Sun & Fun—Fluid Lotion SPF 50+, the Dreamwood-scented Sensual Glow Skin—Shimmer Effect Fluid Lotion 50+ (with a sandalwood-like odor), the Urban Relax—UV Shield Stick SPF30 and the Relaxing Day Care Cream Minimalistic SPF 30 (featuring three rather than five UV filters).

Itch-free Gentle Skin Care

Solabia's Serenibiome (propanediol (and) glycolipids) is designed to offer gentle care for sensitive atopic-prone skin.

The technology, which won the NYSCC Suppliers' Day Ingredient Maverick Award for ingredient innovation, is based on a biofermentation of *Pseudozyma flocculosa* fungus, yielding flocculosin, an antifungal that repairs skin sensitivity[b].

The Serenibiome active ingredient "tackles the itch-scratch vicious cycle," per Solabia. In clinical tests, Serenibiome reportedly reduced skin redness, dryness and itching sensations.

The technology accomplishes these outcomes by bioselectively inhibiting the growth of pathogenic *Staphylococcus aureus*, which induces skin dysbiosis, leading to atopic skin. Notably, this inhibition in no way negatively impacts the more beneficial *Staphylococcus epidermidis* population on the skin, per Solabia.

The technology also reduces pro-inflammatory markers involved in nociception, or the transmission of unpleasant sensations, and synthesizing well-being molecules to help sooth itching sensations. Serenibiome also accelerates the re-epithelialization process for barrier regeneration/repair.

Taken together, the Ecocert Greenlife and COSMOS-compliant ingredient is reportedly ideal for sensitive skin care, dry skin solutions, face and body care generally, atopic-prone skin solutions, and baby care.



Solabia's Serenibiome (propanediol (and) glycolipids) is designed to offer gentle care for sensitive atopic-prone skin.

Next-level Ceramides

Biofermented ceramides: Croda's SphingoCare range of biofermented ceramides are designed to be formulated into lotions, cosmetics and hair care products.

These fatty acids support skin barrier function, protecting the skin and scalp from dryness and germs, per Croda.

In skin and hair care applications, SphingoCare ceramides can reportedly support claims that address issues such as skin aging/hydration, scalp well-being, skin soothing, environmental protection, lip care, microbiome balance and hair cuticle repair.

The SphingoCare range is primarily biotechnology- and plant-derived (plant and yeast fermentation) and are available as high purity level, pre-dispersion or biomimetic blends.

Biomimetic ceramides: Syensqo has acquired South Korean biotech-derived biomimetic ceramides-specialist JinYoung Bio to boost its renewable skin care and hair care specialties.

JinYoung Bio also features biobased functional ingredients for skin care and color cosmetic applications.

Syensqo is now set to market these biomimetic ceramides under the Cerafy trade name.

"This acquisition reflects our deep commitment to innovation and our focus on sustainable solutions leveraging the power of biotechnology," said Ilham Kadri, CEO of Syensqo. "We are dedicated to making a meaningful impact in the beauty industry, addressing critical environmental and societal challenges with groundbreaking circular solutions."

"Our aim is to provide our customers with advanced skin care solutions that harness the natural power of specialty ingredients like ceramides," said Michael Radossich, president of the consumer and

[b]www.ncbi.nlm.nih.gov/pmc/articles/PMC1068648/

Courtesy of 9nong

resources division at Syensqo. "This investment puts Syensqo at the forefront of leveraging the dynamic nature of ceramides, a hero ingredient in cosmetic products including the fast-growing dermocosmetics."

Gentle Solutions for Acne Care

Acne is a perennial consumer concern. So is sensitive skin.

It's no surprise, then, that Spate[c] recently reported that TikTok views for hypochlorous acid content recently grew 192.3% over the period of one quarter (as of May 2024). Ideal for acne-prone skin and other skin issues, "TikTok views for hypochlorous acid follows the growth for the ingredient on search, revealing that the consumer's interest of hypochlorous acid does not originally stem from a viral video."

At the same time, a number of ingredient firms are also approaching the gentle acne care space with more novel materials. For instance, LipoTrue's SP[AI]^3 peptide is designed to address sebum production, pore size and inflammation to minimize the appearance of blemishes and imperfections on acne-prone skin.

The technology reduces sebum synthesis and quantity while diminishing pore size and pore obstructions. At the same time, it minimizes bacterial porphyrins and (not coincidentally) *C. acnes*-induced inflammation, per LipoTrue.

In vivo testing of SP[AI]^3 has uncovered rapid results for quickly purified skin. Per data cited by the supplier, use of the ingredient cut sebum by 39% in seven days, pimples by 19% in 14 days and pore size by 8% in 28 days.

Elsewhere in acne care, TRI-K Industries Inc.'s TRICare CG is a solvent-free multifunctional ingredient derived from amino acids and fatty acids that regulates sebum production to address excess shine and oiliness while also minimizing the appearance of skin redness and pore size.

The gentle technology also counteracts acne- and dandruff-causing organisms for a more skin-friendly microbiome.

Furthermore, TRICare CG can be used in place of conventional preservative systems in rinse-off and leave-on formulations, per the supplier.

Biotech K2 for Skin Defense & Repair

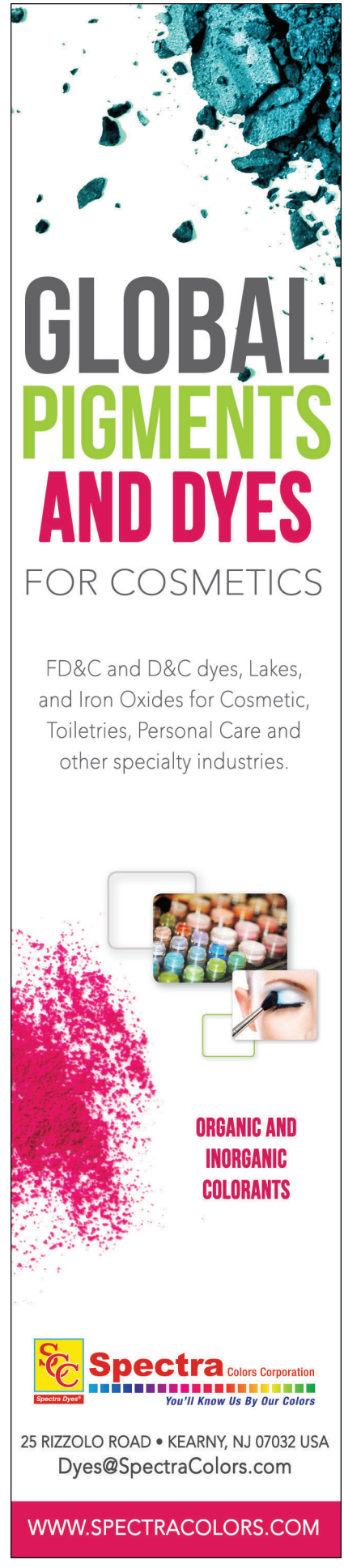
Sino Lion Group's BioEssence (K2) MK-7 (menaquinone-7) is a biotech-derived all-trans functional vitamin K2 approved for use in markets such

[c]https://hubs.la/Q01_Zqkn0



A number of ingredient firms are approaching the gentle acne care space with novel materials.

Image by okrasiuk at Adobe Stock



as China. In topical applications, the ingredient technology can protect cells from oxidative damage and thereby prevent UV and inflammatory damage by inhibiting overexpression of kallikrein 5 activity; reduce the peroxidation of lipids and improve cell viability under peroxidative stress; scavenge excess free radicals; strengthen and repair the skin barrier; and more.

Inclusive Skin Care-Makeup Hybrids

As *Global Cosmetic Industry* magazine has previously reported, there is an increasing focus on hybrid makeup-skin care products that pair color with care. As some color-focused brands have found out the hard way, insufficiently inclusive shade ranges can become a brand nightmare.

Spectra Colors Corp. helps brands with their product shade ranges, in part by offering inorganic iron oxides. Inclusive shade ranges for tinted skin care and hybrid formulations will require iron oxides such as Spectra Colors' Iron Oxide Light Brown (3.IO.0010NK) and Iron Oxide Brown AV627 (3.IO.V62700). The tones can be applied in everything from foundations and lip formulations to lotions and creams.

Where is Beauty Biotech Going?

Way back in 2019, Mintel noted[d], "As lab-grown products continue to enter the market, consumers' comfort with biotechnology will increase." Indeed, since that time, a wide array of biotech-driven beauty ingredient innovation has flooded into the market, including many technologies profiled in this very trend report. Looking ahead, many new, unique tech is set to expand biotech's impact on beauty even further.

In April 2024, Sweden-based Melt&Marble attended in-cosmetics Global in Paris. Though the company had not yet launched a beauty industry ingredient, the firm took the opportunity to build buzz around its technical capabilities in using precision fermentation to develop specialty fats.



Hydrosome Labs has developed a new technology that can double precision fermentation yields and decrease production time by up to 25%.

These designer fats and lipid molecules will have many uses in beauty and personal care, according to the company, which has also delivered fats to the food industry. The company plans to debut its first beauty-centric material in the first half of 2025, per the company.

This specialty fat, intended for skin care applications, will have a melting profile and functionality similar to beef fat, thereby serving as a functional substitute to both animal- and plant-based fats. Solid at room temperature, the material will melt at skin temperature and offer bio-active fatty acids with skin benefits such as anti-inflammatory activity, wrinkle formation reduction and hydration and repair.

Meanwhile, Illinois-based biotech company Hydrosome Labs is tapping the use of ultrafine water bubbles featuring "diameters smaller than a bacterial cell" to double precision fermentation yields and decrease production time by up to 25%.

In effect, the company argues it can make beauty and personal care ingredients that are more affordable, effective (such as skin care materials with improved nutrient uptake) and sustainable than conventionally produced materials.

According to Hydrosome Labs, ultrafine bubbles "enhance the delivery of active ingredients," leading to better resulting materials while cutting down on the need for penetrating agents and other extraneous materials in the production process.

Specifically, these bubbles "increase cellular growth, overall biomass and target molecule titers," per the company. "This leads to more efficient operational processes that minimize resource consumption and produce more affordable products for consumers."

"It's truly exciting to see how easily the ultrafine bubbles produced by Hydrosome's technology integrated into our pilot scale reactors and showed immediate benefit to microbial growth," said Brian Jacobson, associate director of strategic operation at the Integrated Bioprocessing Research Laboratory (IBRL) at the University of Illinois Urbana-Champaign. "While there have been significant advances in synthetic biology resulting in a tremendous number of new products capable of being made through

Courtesy of Hydrosome Labs

[d]www.mintel.com/press-centre/mintel-announces-global-beauty-and-personal-care-trends-for-2030/

fermentation, we have seen very little innovation in the fermentation process or equipment to assist in scaling these discoveries. This technology has the potential to positively impact the economics of new products in a wide range of industries and can also be applied to existing processes or retrofit last generation fermentation equipment currently unsuitable for these new products."

Paul Gadbut, CEO of Hydrosome Labs, called the use of ultrafine bubbles as "a win for manufacturers, consumers and investors alike."

High-naturality Polymer with a Light Touch

SNF's Natursol EMI Lite is a rheology modifier that combines a light texture and stabilizing performance. It also features a naturality index of 78%.

As part of SNF's inverse emulsion polymer portfolio, Natursol EMI Lite is cold-processable, leading to diminished CO_2 emissions and processing times.

Its biodegradability, meanwhile, has reportedly been confirmed via OECD 301F testing.

Upcycled Wood Pulp for Silky Beauty Effects

Nordic Bioproducts Group has opened a new production site for the commercial-scale development (10,000 tons/annually) of cellulosic materials in Lappeenranta, Finland.

The site is located close to six pulp manufacturing plants and seaports.

The facility comprises the company's AaltoCell Technology, which reportedly uses 1/100th of the sulfuric acid typically applied in the production of microcrystalline cellulose.

The system also uses bark and wood-derived black liquor to produce the heat and electricity needed for the process.

According to an official announcement, an independent third-party study found that "the process achieves a significant 72% reduction in greenhouse gas emissions compared to traditional methods."



Microcrystalline cellulose can boost the volume and stability of skin care and other beauty applications, while also lending them a silky effect.

Microcrystalline cellulose can boost the volume and stability of skin care and other beauty applications, while also lending them a silky effect.

The biodegradable material leverages FSC-certified forest material and is reportedly non-allergenic.

Microcrystalline cellulose also has applications in concrete, bioplastics and much more. ■

Courtesy of Nordic Bioproducts Group



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COSMETIC PACKAGING TREND TRACKER: SUSTAINABILITY x FUNCTIONALITY

A new generation of sustainable packaging solutions solves brand and consumer problems, while minimizing ecological impacts.

According to Statista, more than 75% of U.S. consumers "placed some level of importance on sustainably packaged cosmetic products in 2023," with the largest cohort stating that sustainable cosmetic packaging was at least somewhat important in their skin care and makeup selection process[a].

At the same time, Spate[b] has noted a 34.6% year-over-year uptick in searches for upcycled products; simultaneously, searches for chemical recycling, particularly chemical recycling centers, has also increased.

Taken together, consumer awareness of the sustainability issues associated with cosmetic packaging continues to grow. It's no surprise, then, that so many packaging suppliers have upped their game with a wide array of sustainable, high-performance packaging solutions.

Sustainable Leak-proof Packaging

Product leakage, particularly in e-commerce-related shipping is a perennial issue facing beauty brands. Two new solutions address these concerns.

First, Aptar Closures' new E-Disc Top is designed to prevent in-transit leakage for products sold online, while eliminating the need for liners, shrink bands or other extra shipping packing material.

It also allows brands to bypass shipping preparation fees imposed by major online retailers when additional protective packaging is required.

The E-Disc Top, manufactured in the United States, is currently being produced and is available in a 24-410 flat neck finish. It is suitable for medium to thick viscosities.

[a]https://www.statista.com/statistics/1464312/us-consumer-views-on-sustainable-beauty-packaging/#statisticContainer

[b]https://hubs.la/Q01_Zqkn0

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More than 75% of U.S. consumers "placed some level of importance on sustainably packaged cosmetic products in 2023," according to Statista.

Image by Prostock-studio at Adobe Stock



The disc-top closure features an integrated, concealed mechanism that requires more force to be applied upon initial opening, but thereafter operates as a standard disc top closure, per Aptar.



Epopack's leak-proof PET screw-on cap with dual seal function is designed to ensure products ship without incident.

It features a crab claw seal and fits 0.166- and 0.310-inch orifice sizes.

The top is Amazon ISTA-6 compliant and is therefore able to withstand harsh shipping conditions.

This keeps the product secure and prevents cracks, leaks and breaks, thereby diminishing customer complaints and returns.

The disc-top closure features an integrated, concealed mechanism that requires more force to be applied upon initial opening, but thereafter operates as a standard disc top closure, per Aptar.

The PP closure is fully recyclable and available in post-consumer recycled (PCR) content.

Two more disc top dispensing solutions will be launched by Aptar this year, per the company.

Meanwhile, Epopack's leak-proof PET screw-on cap with dual seal function is designed to ensure products ship without incident.

Designed to address common leakage issues associated with oil-based products, the AV series screw-on caps, paired with PET heavy wall bottles, provide leakage prevention for products such as oils, makeup removers and toners—all with a monomaterial solution.

The dual seal provides two layers of protection.

First up is a stopper in the center of the cap that can be plugged into the reducer's opening.

Second is a seal ring round the cap, which is designed to press on the surface of the reducer to create a second seal.

Combined, the design elements are intended to keep products secured during transport and storage.

Meanwhile, the heavy-wall bottles provide additional sturdiness and durability, as well as a weighty, premium feel.

The AV series is available in 30 ml, 60 ml, 120 ml and 150 ml variants and can be customized with various decoration options.

Finally, Aptar's new hoodless Maya aerosol actuator features a twist-to-lock feature for easy on-the-go use and product security while in transit.

Maya's top surface is 100% customizable, per Aptar, allowing for the application of sensorial actuation features, finishes and logos. Also, because the actuator is molded in two parts, brands have wide flexibility on color combinations.

Maya can be used for the dispensing of high powder, with a smooth flow path for solid powder formulations that reduces clogging.

The actuator is production-ready in North America.

Refillable Designs

Monomaterial Lipsticks

Albéa Cosmetics & Fragrance's Pure Kiss lipstick pack cuts the environmental impact of lip products with a monomaterial PET design that is readily recyclable.

The square-shaped lipstick features Albéa's Unigreen PET mechanism, which comprises three pieces.

Unigreen's gentle swivel torque offers brands an elegant gesture, per the company, and supports easy and secure refills.



Albéa Cosmetics & Fragrance's Pure Kiss lipstick pack cuts the environmental impact of lip products with a monomaterial PET design that is readily recyclable.

From top, L to R: courtesy of Aptar; Epopack; Albéa



Lumson's new Re Place refillable glass jars are designed to marry aesthetics with sustainability.



Quadpack's Regula Airless Refill is now reportedly manufactured in the United States.

Notably, the unguided mechanism is not usable if not snapped into the lipstick base.

The pack is compatible with various types of lip formulas and can be customized.

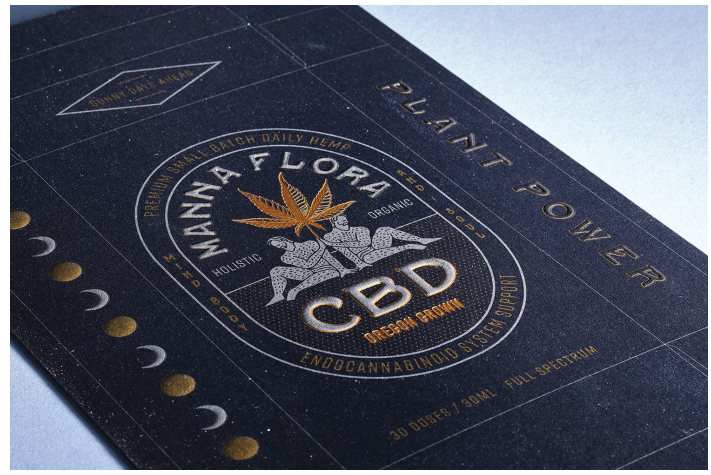
Laëtitia Beavogui, marketing manager at Albéa Cosmetics & Fragrance, says, "Our objective for 2025 is to offer beauty brands a standard range of refillable lipsticks made of environmentally friendly materials that drive packaging recycling."

Refillable Jars

Lumson's new Re Place refillable glass jars marry aesthetics with sustainability. Designed for prestige makeup and skin care, the range of six thick jars feature different designs depending on size:

- 50 ml (DeLuxe, Unique and Slim)
- 50 ml and 15 ml (Japa)
- 50 ml with thick and conical base (Infinity)

The jars' plastic inner cups are rendered in PP that can be readily recycled, per Lumson, and paired with a protective cover. The jar, inner cup and cover can be customized with inner lacquering, various colors and other deco options.



Neeneh recently launched folding boards offering a variety of effects for sustainable and/or premium brands.

Airless Refillables

Quadpack's Regula Airless Refill is now reportedly manufactured in the United States.

The airless designs are produced in 15 ml, 30 ml and 50 ml variants that offer formula protection, a high restitution rate, precision dosage and 360-degree usage, per the supplier.

The Regula Airless Refill features a metal-free pump and a refillable mechanism that allows easy removal and insertion of refill cartridges. It is available in PET or with post-consumer recycled (PCR) PET, according to Quadpack.

Post-consumer Waste Folding Board

Neeneh recently launched folding board with a snow white, eggshell finish and comprising 30% post-consumer waste (PCW). The board is the brightest (95 brightness) white variant featuring PCW, per the company. The board is available in 18 pt and 24 pt caliper thickness.

Separately, the company has launched pearlized single colors for premium beauty and holiday packaging. White pearl, available in 18 pt thickness, is bright, blue-white, while the silver pearl, also available

From top, L to R: courtesy of Lumson; Quadpack; Neeneh



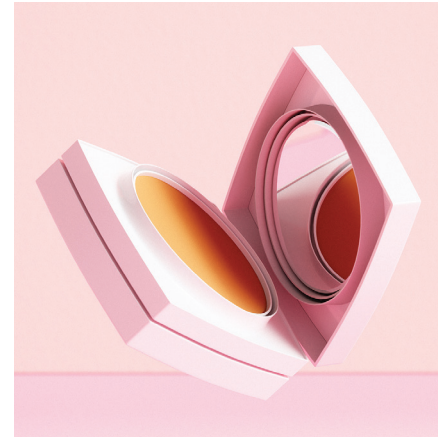
Lumson's Essential atmospheric aluminum collection features minimalist designs with bottles available in 50 ml, 75 ml, 100 ml and 150 ml variants that can be paired with cream and spray pumps, depending on dosage.



The Aptar Color Code pump's PCR content (100% PCR Plus cap, 95% PCR Plus collar and 50% PCR Plus actuator and fixture) reportedly cuts its carbon emissions by up to 39% compared to a pump featuring conventional content.



Quadpack has launched a range of dip-in packs with matching applicators.



SeaCliff Beauty's BeautiLock SPF Cushion Compact design features the company's patented BeautiLock closure technology that limits product weight loss at less than 1%.

in 18 pt thickness, offers a neutral on-trend shade that can be applied to holiday concepts.

Finally, Neeneh's black pearl, available in 18 pt thickness and 30% PCW, offers a "unique and sophisticated" shade of black for upscale brands.

Versatile Atmospheric Aluminum

Lumson's Essential atmospheric aluminum collection features minimalist designs with bottles available in 50 ml, 75 ml, 100 ml and 150 ml variants that can be paired with cream and spray pumps, depending on dosage.

The Essential collection is therefore appropriate for sun, hair, body and skin care applications, per Lumson.

The aluminum designs can be customized with decorations and finishes with up to six colors.

The Essential collection can be manufactured in 100% PCR aluminum and combined with dispensing systems in PP/PCR PP/ aluminum overshell.

Lumson also offers the TAL airless system with an aluminum container in 50 ml, 75 ml and 100 ml sizes. TAL has been designed to allow the consumer to separate the aluminum components from the plastic one, allowing each to be properly recycled after use.

PCR Fragrance Pump

Aptar Beauty's new Color Code PCR is reportedly the first fragrance pump available with as much as 67% mechanical PCR Plus resin content without compromising on customization options and aesthetics.

The snap-on pump system is manufactured Italy and dispenses an 80 mcl dosage. The design is fully customizable, per Aptar, allowing for a variety of colors in a glossy finish.

The pump's PCR content (100% PCR Plus cap, 95% PCR Plus collar, and 50% PCR Plus actuator and fixture) reportedly cuts its CO_2 emissions by up to 39% compared to a pump featuring conventional content.

This was confirmed via a life cycle analysis using Aptar's Eco Design tool, the company noted.

This reduction in emissions allows brand clients to reduce their Scope 3 carbon output, while leveraging a PCR content claim.

The pump could also help brands avoid some plastic packaging taxes in certain regions.

The design follow's Aptar's endorsement of the New Plastics Economy Global Commitment to address plastic waste in part by rendering products more recyclable and longer-lasting.

"Color Code PCR is a stylish step towards sustainability: it is our very first plastic fragrance pump integrating PCR," says Giuseppe Barletta, regional platform manager EMEA for fragrance lifestyle, Aptar Beauty. "This pump not only adds a touch of color and

From top, L to R: courtesy of Lumson; Aptar; Quadpack; SeaCliff

differentiation to fragrance launches but can also help brands achieve their sustainability goals by committing to packaging circularity."

Versatile Dip-ins

Quadpack has launched a range of dip-in packs with matching applicators.

Featuring thick-wall bottles made of recyclable materials, the packs can be mixed and matched with various applicators.

Applicator options include standard and novel options for makeup and skin care.

Convenient Formula Protection Solutions

SeaCliff Beauty's BeautiLock SPF Cushion Compact design features the company's patented BeautiLock closure technology that limits product weight loss at less than 1%.

The compact concept formula is easy to apply (and reapply), while the packaging is convenient for on-the-go use.

The formulation can be easily applied over makeup while featuring makeup-setting and mattifying effects.

Better Beauty Dispensing

Precision Dosing

Aptar Beauty's new NeoDropper delivers precise dispensation of "demanding concentrated" skin care, as well as foundations. The concept aligns with the rise in prestige and clinical skin care.

When the NeoDropper's bulb is pressed, the formula within rises in the dip tube and fills the short applicator. The dose can then be dispensed with a new press of the bulb.

The shortness of the applicator is said to be easier for consumers to handle, further ensuring precise dosage application.

In fact, in an Aptar consumer study featuring 17 female skin care serum users, participants reported that NeoDropper's "primary benefit identified was the improved dosage facilitated by the new short applicator, which was perceived as easier to handle and aiding in using the correct amount of product."

Furthermore, the design reportedly ensures that the applicator does not come into direct contact with the formula in the bottle, which in turn ensures product integrity by preventing retro-contamination by bacteria.

The NeoDropper's design also prevents product from spilling, even if the bottle is overturned, per Aptar.

The upper and lower collars of the NeoDropper are fully customizable with anodizing colors, double anodization, brushed effects, silk-screening, lacquering and branding on metal.

The bulb's color and finish (including metallization) can also be customized.

NeoDropper can be paired with current dropper bottles in the market, per Aptar, though the bottle selected for the launch is Heinz Glas' Oslo II, which is reportedly generally compatible with glass recycling streams.

According to Aptar, after using the NeoDropper pack daily for two weeks, 15 of 17 respondents declared that they preferred NeoDropper over their current packaging and would be willing to pay €5-15 more for it.

NeoDropper Classic samples are now available, with production expected in November 2024.

"We have created NeoDropper after a thorough study of consumers needs and desires in the face care experience," says Xavier Joseph, vice president global marketing and innovation, Aptar Beauty. "We look forward to partnering with premium and prestige skin care brands in order to have consumers enjoying this innovation."



Aptar Beauty's new NeoDropper delivers precise dispensation of "demanding concentrated" skin care, as well as foundations.

Plug-and-play Tottles

FusionPKG's Revo Tottle is designed for controlled liquid dispensing of low-viscosity and lightweight formulas, particularly serums, primers and foundations.

Its SimpliSqueeze valve technology supports pinpoint application for an easy, mess-free experience, per the company.

The Boston round tottle is produced with advanced blow



FusionPKG's Revo Tottle is designed for controlled liquid dispensing of low-viscosity and lightweight formulas, particularly serums, primers and foundations.

L to R: courtesy of Aptar; FusionPKG



Allstar Packaging Corp. offers squeezable HDPE tottles with PP caps and PE dropper tips that can be customized in various shapes and sizes, while the bottle and cap can be produced with customized color.



Inoac offers shrink sleeves featuring a variety of deco processes and textures in the same label.



Inoac has launched new decoration techniques, including cold foil stamping, which offers the look and feel of hot stamping without the risk of deformation on thin, lightweight containers.

molding techniques and offers brands a practical plug and play system, reportedly allowing brands to tailor the package's shape and aesthetics without the added tooling costs.

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

Customizable Tottles

Allstar Packaging Corp. offers squeezable HDPE tottles with PP caps and PE dropper tips that can be customized in various shapes and sizes, while the bottle and cap can be produced with customized color.

Ideal for low-viscosity formulations, the designs' components can be separated for recycling, per the company. Furthermore, the tottle bottle and cap can be made in PCR.

New Deco Opportunities

Inoac has launched new decoration techniques, including cold foil stamping, which offers the look and feel of hot stamping without the risk of deformation on thin, lightweight containers.

The stamping can be applied to PE containers, which have traditionally not been able to accept hot stamping. Furthermore, the cold foil stamping can be applied to textured surfaces.

The company also offers shrink sleeves featuring a variety of deco processes and textures in the same label. The sleeves feature a virtually invisible seam and can be removed for packaging recycling.

Beyond these capabilities, Inoac offers extrusion blow molding services for squeezable designs available in PE, PET and PP. Featuring lower tooling costs compared to other processes, the production method allows for various deco options.

Labeling Excellence

Premium Label & Packaging Solutions (PLPS) has won a Gold in the "Best Use of Cold Foil (Label or Carton)" category at the Foil & Specialty Effects Association's (FSEA) 31st Annual Gold Leaf Awards.

The winning shrink sleeve label was produced for OL Products for its Infatuated Tanning Lotion and was printed at Overnight Labels, the company's Deer Park, New York plant.

The label's deceptively simple black background with red inverted triangles reveals a 3D kaleidoscope effect when it hits light.

PLPS used multiple processes to achieve the look, beginning by laying down the black and red ink.

Once that was completed, PLPS applied a holographic Pillars of Light cold foil and a second coat of black and white ink.

In the final step, the web was turned to apply a silk screen UV to the red triangles to boost its dimensionality.

"We are always driven to maintain a level of excellence in everything we print, particularly when a job demands intricate details," says Leslie Gurland, VP of sales and marketing at PLPS. "This win is a testament to our unwavering commitment to quality and the artistry of label printing."

"We had a record number of entries in our 31st annual FSEA Gold Leaf Awards, which highlighted a variety of print embellishment technologies," says FSEA executive director Jeff Peterson. "The creativity and new uses for labels, cartons, direct mail, and other applications continue to amaze me."

Packaging Problem Solving

Meanwhile, R.R. Donnelley & Sons Company recently highlighted its paperboard packaging and folding cartons, labels for shipping and decor

L to R: courtesy of Allstar; Inoac; Inoac

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R.R. Donnelley & Sons Company recently highlighted its paperboard packaging and folding cartons, labels for shipping and decor needs, and supply chain solutions at Luxe Pack New York.



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needs, and supply chain solutions at Luxe Pack New York.

The company, which has 18,000 clients and 28,000 employees across 27 countries, focuses on customer challenges in beauty and other consumer product categories.

For one client, RRD introduced a clean beauty brand to a customized hemp stock comprising hemp, straw and recycled cotton fiber to reduce the amount of trees needed to produce packaging.

At the same time, the stock's surface texture offered smooth printing with flood coats, ensuring the desired aesthetic effect. In addition, the stock reportedly did not crack when it was scored.

For another client, a skin care brand experiencing inconsistent packaging due to multiple sources of paper stock and presses for folded cartons, RRD standardized paper stocks, among other process upgrades.

Finally, for a cosmetics client, RRD was able to reduce label and packaging costs by running print trials to lower the expense of hot stamping, varnishing and pearl labeling. It also replaced films and liners with thinner variants. Finally, RRD near-shored carton production. ■



L to R: courtesy of PLPS; R.R. Donnelley & Sons Company

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Euromonitor International's Voice of the Consumer: Beauty Survey shows that 20% of U.S. male consumers voted "skin care is an important priority for me" as a common reason for purchasing skin care products.

Image by fizkes at Adobe Stock

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THE 2024 US MALE SKIN CARE AGENDA

Digital engagement, targeted care, celebrity brands and emerging concerns are reshaping a vibrant category.

BY JULIA YANG, EUROMONITOR

Younger generations are leading the push to normalize advanced skin care practices for men. At the same time, social media is delivering more male-focused education. To tap into the category's growth opportunities, companies will need to pursue brand building online to reach an increasingly digital male skin care consumer.

Skin Care Leads Grooming Growth

The evolution of men's self-care through skin care in the United States is fueled by societal change and the rise of gender fluidity. Currently, U.S. men's skin care is predicted to record a 3% CAGR from 2023 to 2028, outpacing overall men's grooming with just under a 2% CAGR.

While growth drivers may vary across different markets, the United States closely follows Asia's footsteps in normalizing male usage of beauty and personal care products beyond traditional grooming categories such as shaving and hair care.

U.S. men's skin care retail value sales accounted for 4% of total U.S. men's grooming sales in 2023, comparable to its industry share from the previous year.

In comparison to shaving and hair care, which comprised 24% and 11% of U.S. men's grooming retail value sales, respectively, skin care's traction in recent years hints at intra-category growth opportunities as U.S. male consumers' skin care awareness matures.

Male Skin Care Usage Patterns Evolving

All skin care and advanced care segments witnessed an increase in usage from male consumers compared to pre-pandemic years (**T-1**).

Euromonitor International's Voice of the Consumer: Beauty Survey (fielded June to July 2023 (n=18764)) shows that 20% of U.S. male consumers voted "skin care is an important priority for me" as a common reason for purchasing skin care products (**F-1**).

Much like how women have increased self-care and ingredient-led beauty purchasing behaviors post-pandemic, self-care routines are becoming increasingly important, and more complex, to men as well.

What Claims Men Want from Skin Care

In skin care, desired functional product claims such as moisturizing/hydrating (+7%), sun protectant/SPF (+7%) and skin brightening/luminosity/radiance (+7%) saw a strong rise in interest from U.S. male consumers between 2022 and 2023, with other features such as texture improving/evens skin tone (+4%) and skin plumping, lifting or firming/anti-sagging (+3%) also seeing a steady rise (Euromonitor International's Voice of the Consumer: Beauty Survey, fielded June to July 2023).

The landscape of men's skin care in the U.S. displays a symbiotic relationship.

Brands' product offerings are diversifying toward more specialized ranges.

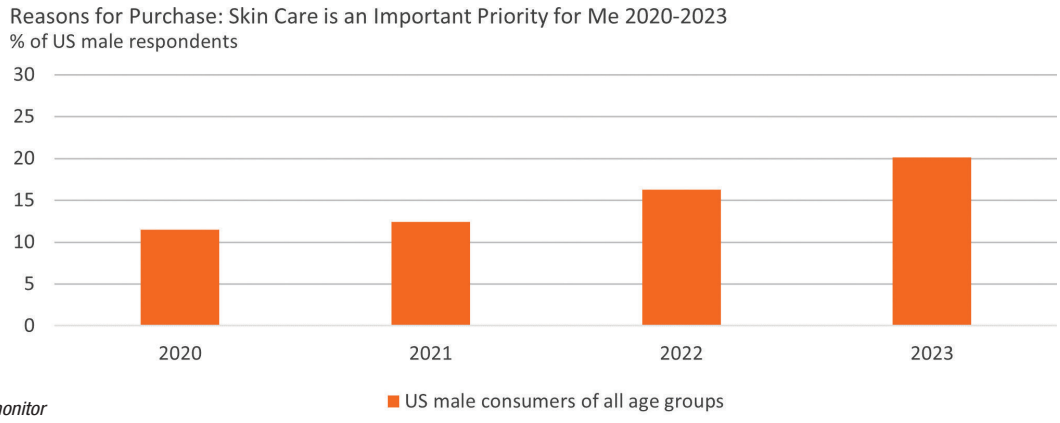
This is a result of male consumers being more accepting of product functions that transcend beyond basic functionalities, such as cleansing and

T-1. Frequency of men's skin care product use, male 2023 (% of respondents who selected "daily or more frequent" or "1-5 times a week")

Skin Care					Advanced Care		
Facial cleansers	Facial moisturisers	Acne treatment	Facial toners	Face mists, sprays, or water	Sunscreen	Face masks	Anti-aging
↗ 40%	↗ 36%	↗ 27%	↗ 26%	↗ 26%	↗ 40%	↗ 23%	↗ 25%

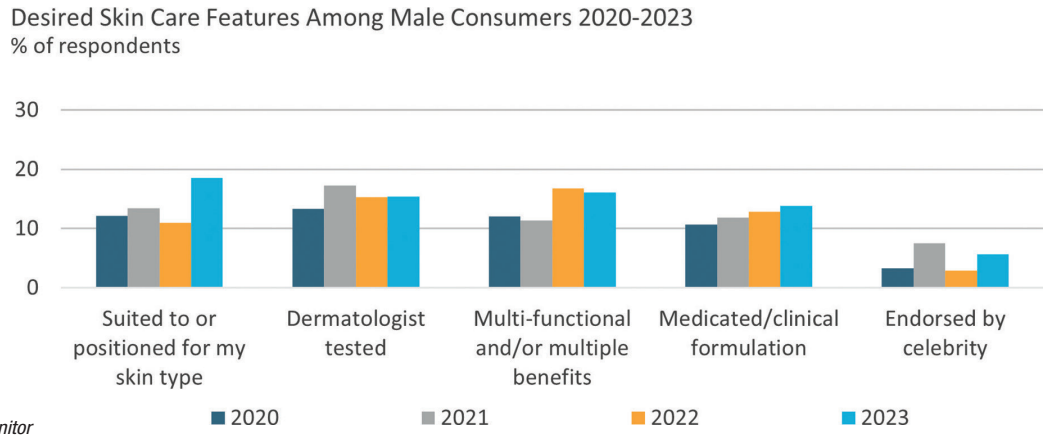
Source: Euromonitor International Voice of the Consumer: Beauty Survey, fielded June to July 2023 (n=20,350)
Note: The survey-takers are only those male respondents who reported using cosmetics at least sometimes
↗ → ↘ Higher/equal/lower than to 2019 results

F-1 Skin care is increasingly important to U.S. men



Source: Euromonitor

F-2 Men's most desired skin care functional claims



Source: Euromonitor

moisturizing, to more specialized functions such as sun protection and texture improvement (**F-2**).

How Social Media & Digitalization is Reshaping Men's Skin Care

In 2023, 11.7% of U.S. male respondents claimed that endorsement from social media personalities/ influencers had an impact on their recent purchase of skin care products.

This was a sharp increase from the 4.2% response in pre-pandemic 2019—especially among millennials (Euromonitor International's Voice of the Consumer: Beauty Survey, fielded June to July 2023).

No doubt, digital platforms such as TikTok and influencer communities have made a huge impact on how male consumers are educated.

Many male consumers, especially those who are younger, are being introduced to beauty and personal care through online channels first, particularly given the rise of male beauty GRWM ("get ready with me") influencers such as Edward Zo (@edwardzo) and male dermatologists such as Muneeb Shah, D.O. (@dermdoctor).

These influencers expand ingredient awareness, product education and encourage elevated daily skin care habits.

Euromonitor International's Voice of the Consumer: Digital Survey (fielded March to April 2023) shows that 50% of Gen Z male respondents found information about a brand, company, or products through TikTok in 2023—a steep increase from 36% in 2022 (**F-3**).

Celebrity Partnerships & Online Marketing in Male Skin Care

Looking beyond traditional influencers, brands are also finding success with male celebrity partnerships.

Take Michael Cera's collaboration with CeraVe in the 2023 Super Bowl commercial (among other adverts circulating on other social media platforms). This high-profile placement during America's most-watched game

with a significant male viewership reinforces the message that skin care is for everyone. The highly marketed move helped CeraVe broaden its appeal to men while diversifying brand awareness among non-CeraVe users.

Social media marketing for men's skin care (**F-4**) that employs partner "skinfluencers" is primarily driven by dermocosmetics brands such as Neutrogena and CeraVe, where hashtags like #neutrogenapartner and #ceravepartner have reached almost 6,000 and 7,000 posts, respectively.

Dermo-positioned brands usually provide clinical expertise on specialized skin care systems for treating specific issue areas due to their research-based development of advanced care products.

Because dermo brands are leading the influencer-brand collaboration style for skin care, they are raising consumer awareness of advanced care education and solutions, especially common issues such as fine line and wrinkle reduction/prevention, sun protection, and dry/aged skin symptoms.

Celebrity-backed Male Brands Boost Targeted Skin Care

While Gen Z may have championed self-care for men, the rise of male celebrity grooming brands has further encouraged the normalization of skin care offerings across diverse care-based needs and demographics.

Gone are the days of generic endorsements for generic products. Today's digital audience craves authenticity and rejects obvious marketing ploys, encouraging celebrities to push boundaries and create purposeful products (**F-5**).

Notable launches in advanced and targeted care in recent years include Le Domaine from Brad Pitt, a luxury-positioned anti-ageing line; Loved01 from John Legend, a melanin-rich skin care brand that retails at less than $20 to ensure accessibility; and, as of early 2024, Papatui by Dwayne "The Rock" Johnson, a line of men's face care, body care, hair care and tattoo care products that focuses on clean ingredients and affordability (retails at less than $10).

It is also important to note that both John Legend and Brad Pitt's brands are marketed as gender-neutral, so while their brands are not specifically "for men," one could assume that they would draw in a strong male audience base.

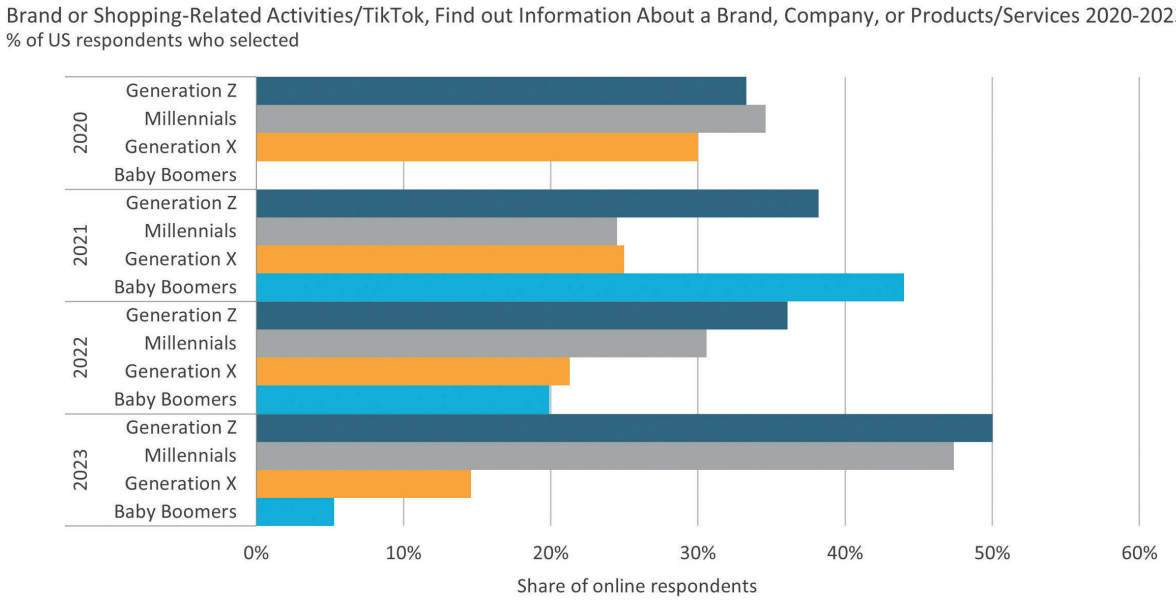
As self-care through skin care becomes increasingly mainstream for men, it will be fascinating to see if male celebrity skin care brands can replicate the success of female celebrity counterparts and analyze the depth of impact of these new ventures in men's skin care and how men approach these products.

Top Trending Male Skin Care Ingredients

Whether they are anti-ageing, anti-acne or melanin-specific care, skin care launches for male consumers are aligning with an ingredient-focused lens.

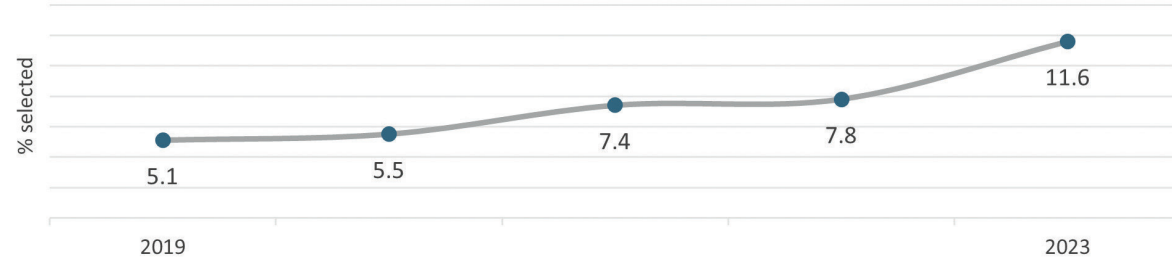
An increasing number of premium men's skin care products boast higher-quality ingredient combinations such as peptides, alpha hydroxy acids, retinol and hyaluronic acid for targeted

F-3 Brand or shopping-related activities on TikTok: find out information about a brand, company, or products/services 2020-2023



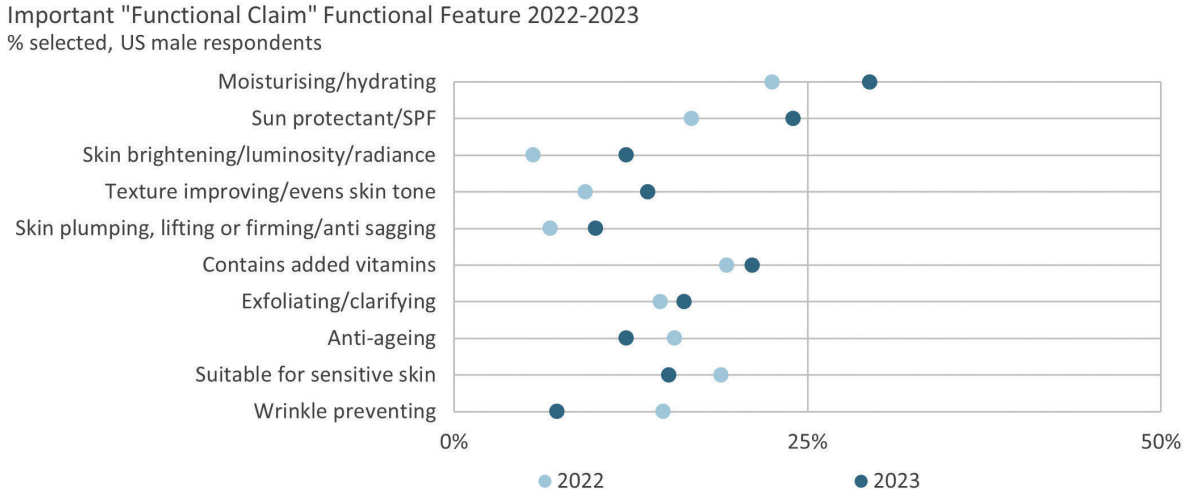
Source: ***Euromonitor Voice of the Consumer: Digital Survey, fielded March to April 2023 (n=20,079)***

F-4 Factors that influence latest skin care purchase: brand or retailer advertising on social media 2019-2023



Source: Euromonitor International Voice of the Consumer: Beauty Survey, fielded June to July 2023 (n=20,350)

F-5 Desired skin care features among male consumers 2022-2023



Source: Euromonitor International Voice of the Consumer: Beauty Survey, fielded June to July 2023 (n=20,350)

treatment in anti-acne management, anti-ageing and skin barrier restoration.

Top Male Skin Care Concerns

Dermo brands are expected to continue their reign due to ingredient-oriented approaches for efficacious treatment, in combination with appealing price points from mass to masstige varieties that are accessible to price-sensitive consumers.

Prospective hotspots could seek to blend solutions-focused and preventative treatment into one, depending on consumer preferences across product categories.

Consumers could demand both solutions and prevention in treating and/or reducing blackheads and wrinkles/fine lines, as these issue areas are top concerns for men across generations (**F-6**).

Top 2024 Men's Skin Care Trends

Although skin care behaviors vary among consumers from different generations, brand presence in social media and the availability of premium formulations for all skin types play a major role in male consumer choices (**F-7**).

As male consumers increasingly turn to digital platforms for targeted product usage advice and advanced care education, brands should leverage social media to partner with male influencers across demographics, skin types and fan bases to reach (and connect) a broader audience.

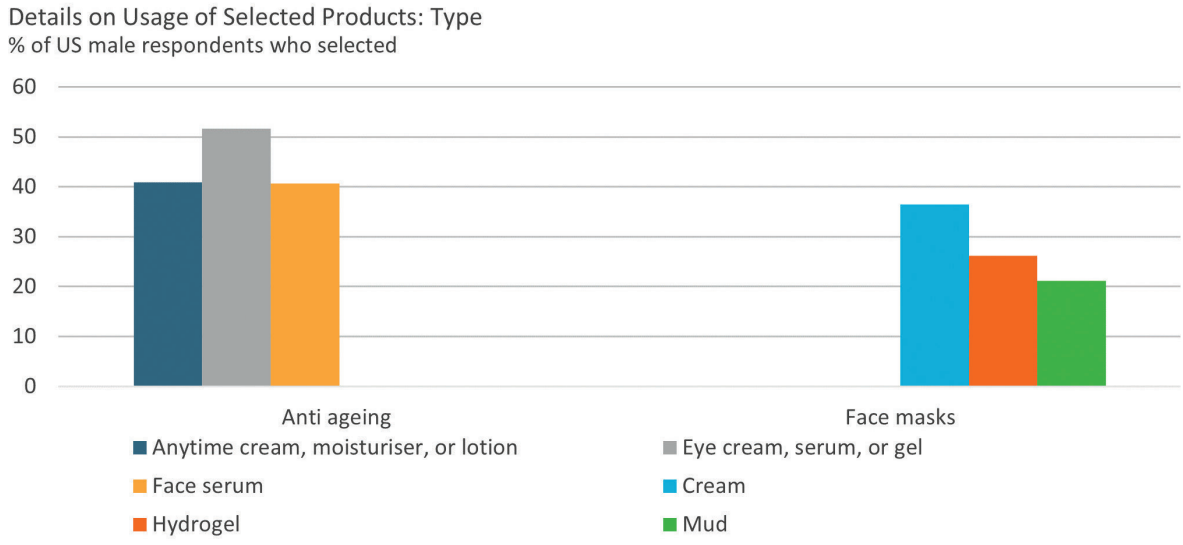
When asked about the impact of positive technology experiences on customer experience and loyalty, 31% of U.S. male consumers said that technology increased brand confidence in 2023, versus 24.6% in 2020 (Euromonitor International's Voice of

F-6 Top five skin concerns: U.S. males by generation, 2023

	#1	#2	#3	#4	#5
Gen Z	Blemish/ acne-prone	Fine lines	Blackheads	Hormone-related skin issues	Sensitive
Millennials	Wrinkles	Blackheads	Dark spots	Puffy eyes	Fine lines
Gen X	Blackheads	Wrinkles	Dark circles	Blemish/acne-prone	Dark spots
Baby Boomers	Wrinkles	Blackheads	Dark spots	Puffy eyes	Sensitive

Source: Euromonitor International Voice of the Consumer: Beauty Survey, fielded June to July 2023, n=20,350

F-7 Men's skin care product usage data



Source: Euromonitor International Voice of the Consumer: Beauty Survey, fielded June to July 2023, n=20,350

the Consumer: Digital Survey, fielded March to April 2023, n=20079).

Euromonitor International anticipates men's grooming brands will expand portfolio offerings by providing solutions that address top-ranked male skin concerns and are suitable across generations.

Offering product ranges that have targeted purposes will not only resonate with consumers across demographics, but with the assistance of digitalized marketable platforms, will also increase brands' growth potential before the movement becomes mainstream.

As men tap more into products with targeted treatment, we can expect advanced care segments to premiumize ingredients. While good skin care does not need to be gendered—only effective—brands and consumers are experiencing transformations in how beauty and skin care philosophies for men are being promoted. ■

INSPIRED BY SKIN CARE, ORAL CARE MOVES BEYOND HYGIENE

Thanks to skin care inspiration and holistic well-being philosophies, oral care has a bigger role to play in wellness.



Oral care is about more than oral health; taking cues from skin care trends, the category is expanding to more holistic care.

Image by Dari_DesignPle at Adobe Stock

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A recent report from Fact.MR shows that the global oral hygiene product market will reach $24.2 billion[a] in 2024 and grow through 2034 at a compound annual rate of 4.2%, totaling $36.4 billion.

Among drivers of the market are a rise in the use of dental picks, tongue scrapers and fluoride rinses, which generally have improved consumers' oral health. But the category's importance in consumers' lives is far more holistic.

"The landscape of oral care is undergoing a significant transformation as it moves beyond hygiene and becomes an integral part of consumers' well-being routines," says Michelle Chavez, vice president of innovation, Accupac/Cobalt Labs. "We are learning that oral health has a huge impact on overall health, as the mouth is literally the gateway into the body. And studies have shown stark connections between oral health and heart health, metabolic health and even brain health, reiterating that oral care is more than just about hygiene."

[a]www.factmr.com/report/68/oral-hygiene-market

Oral Care's Top Growth Markets

The Fact.MR report outlines the key regional growth centers for oral care.

While North America will hold a 27% share of the global oral care market by 2034, the United States will account for 84.1% of that share.

Meanwhile, in Asia, the East Asian oral care sector will expand at a compound annual rate of 5.4% through 2034, dominated by China, which will ultimately hold a 57% share of the region's market.

South Korea is projected to grow more slowly, at 4.2%, while Japan's market will be shaped by an aging population that will require geriatric dental solutions.

Understanding the Shifting Oral Care Sector

"Consumers are increasingly turning to medical professionals for guidance, placing their trust in clinically tested and proven formulations, with dentists becoming the newest type of influencer," says Chavez.

She adds, "Emerging formulations are leveraging known actives, as well as new biomimetic ingredients, to meet consumer demands for safe, effective and sustainable products with clinical, efficacious claims. Additionally, the mainstream adoption of lab-engineered and lab-grown ingredients is driving innovation in oral care, with products designed to adapt to individual needs and provide advanced protection and targeted treatments."

Skin Care Inspires Oral Health

"Formats and textures will take on a more well-being-type positioning and we will see more and more trickle down from skin care, with influence on ingredients, aesthetics and lengthier, differentiated day and night routines," says Chavez.

Indeed, skin care and skin health have been a significant inspiration space for oral care.

A perfect example of this trend in motion is the 2023 launch of Moon's



Japan's oral care market will be shaped by an aging population that will require geriatric dental solutions.



Moon's Luminous Shine Teeth Serum features hydrating hyaluronic acid, anti-inflammatory and antibacterial aloe vera, and whitening hydrogen and urea peroxides.

L to R: image by Haruki Yoshino at Pexels; courtesy of Moon Oral Beauty

Luminous Shine Teeth Serum, featuring hydrating hyaluronic acid, anti-inflammatory and antibacterial aloe vera, and whitening hydrogen and urea peroxides. The serum formula is designed to be used with a doe-foot applicator, yet another nod to skin care.

Peptides are also making their mark.

A 2023 paper published in the journal *Bioengineering* noted[b], "The in vitro and in vivo studies included in this review suggested that peptides may have beneficial effects for treating early carious lesions, promoting cell adhesion, enhancing the adhesion strength of dental implants, and in tissue engineering as healthy promoters of the periodontium and antimicrobial agents."

Profound Products's OralTidePro brand, for instance, comprises mouthwash and intensive repair gel designed to counteract tooth decay resulting from loss of protective enamel and periodontal disease-related gum recession. Both contain a trio of peptides:

- a casein phosphopeptide-amorphous calcium phosphate (CPP-ACP) compound, which reportedly remineralizes enamel
- an anti-gingival degeneration peptide (AGDP)
- and the dental remineralization peptide (DRP) amorphous calcium phosphate, which also addresses gingival regeneration

The peptide are reportedly produced via hydrolysis and "purified using membrane ultrafiltration," per the company.

In addition to its peptides, the repair gel also features the antibacterial and anti-inflammatory sweetener xylitol as well as bicarbonate of soda and coconut oil.

The remineralization claim is on-trend. Chavez notes, "Focused on oral care as health care, Accupac's development department, Cobalt Labs, has formulated a new Remineralization Toothpaste that uses hydroxyapatite, which has been shown to not only repair enamel and dentin, but also proactively prevent and inhibit demineralization."



Remineralization of the teeth is a key on-trend claim tied into overall oral care health.

The biomimetic ingredient has been the focus of recent research. Per a 2022 paper[c] published in the journal *Odontology*, "In vitro and in situ studies are demonstrating promising results of HAP [hydroxyapatite] toothpastes on the remineralization of enamel lesions and preventing/reducing demineralization. Specifically, research appears to demonstrate either its superiority or equivalency to fluoride toothpaste as anti-caries agents."

Probiotics are also a key area of innovation.

For instance Lallemand's 6 sulfated EPS, derived from marine microorganism metabolites, was developed to prevent the formation of pathogen biofilms on skin and in oral care applications.

Biofilm prevention is critical, as pointed out in a 2024 review article in the open-access journal *Biofilms and Microbiomes*[d]: "Dental caries [are] commonly mediated by biofilm. A crucial property of probiotics is the ability to inhibit or eliminate the growth of biofilms and pathogenic microorganisms in the oral cavity."

Among the probiotic oral care launches on the market is Riven's Probiotic Mouthwash, a pH-balancing formulation designed to balance users' oral ecosystems.

The formulation comprises "antioxidants, minerals and botanicals that supports [the] saliva's natural defenses," per the brand. Key ingredients also include probiotic *Lactobacillus reuteri*, probiotic *Lactobacillus paracasei* and prebiotic inulin chickory root.

As these examples show, oral care and skin care brands alike have the opportunity to tap into skin care trends to expand into new claims, formats and, perhaps, categories. ■

[b]www.ncbi.nlm.nih.gov/pmc/articles/PMC9952573/

[c]*www.ncbi.nlm.nih.gov/pmc/articles/PMC8930857/*

[d]www.ncbi.nlm.nih.gov/pmc/articles/PMC10894247

Image by Guilherme Almeida at Pexels

















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AI is Already Reshaping Beauty

From product development to rapid ingredient discovery and accurate skin analysis, artificial intelligence has arrived.



Image by Viktorila at Adobe Stock

As with the wider economy, beauty innovation seems poised to accelerate with new AI-powered tools that allow users to chat with a virtual consultant, reverse engineer products, build new products to a wide array of regulatory, sustainability and retailer requirements, anticipate consumer liking based on reviews of existing similar products, and much more.

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"What steam was to the First Industrial Revolution is what AI will be to the fourth," McKinsey noted[a] earlier this year. "And much as coal supply chains and factory infrastructure were the tipping point that enabled steam power to race up the adoption curve, data collection and data infrastructure are doing the same in the fourth."

As with the wider economy, beauty innovation seems poised to accelerate with new AI-powered tools that allow users to chat with a virtual consultant, reverse engineer products, build new products to a wide array of regulatory, sustainability and retailer requirements, anticipate consumer liking based on reviews of existing similar products, and much more.

This is particularly critical amid emerging regulatory requirements such as MoCRA and ever-changing consumer demands.

These tools, an advancement from legacy systems that rely on Excel tables or cumbersome non-cloud-based databases, can also give a competitive edge to smaller upstart players and early adopters alike.

Here's what that looks like in practice.

From Consumer Consultant to Product Innovation Platform

The Good Face Project first entered the consumer education space with a data-rich, cloud-based solution that allowed shoppers to assess the safety of products based on ingredient compositions.

While the firm was not the first solution to deliver greater transparency, the firm's cloud-based system was less clunky than earlier solutions in the market.

Since its debut in 2018, The Good Face Project has expanded to a business solution, allowing retailers to create interfaces for shoppers seeking guidance on product selection.

It has also developed solutions for contract manufacturers and ingredient suppliers.

By connecting the entire value chain of beauty, The Good Face Project has now produced a product innovation platform powered by the cloud and AI.

CARA Chat: a ChatGPT for Beauty

The Good Face Project's new CARA Chat—powered by CARA AI, the company's proprietary artificial intelligence—is a real-time communication tool similar to ChatGPT but trained solely in beauty-centric natural language.

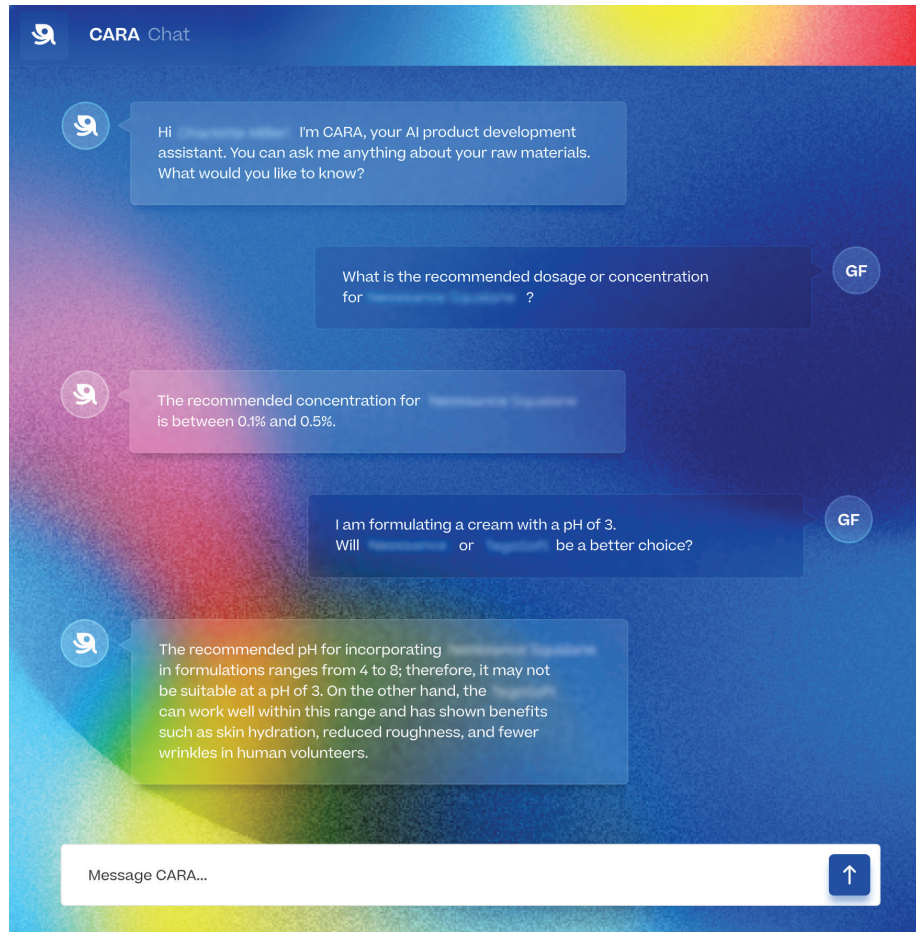
By strictly limiting the chat tool's training, the company has ensured responses are tailored for industry professionals.

CARA Chat adds to The Good Face Project's existing product lifecycle management (PLM) solutions and was built using proprietary data models and information drawn from the company's existing databases, including ingredient supplier portals.

Clients can also input their own data. That information remains confidential and wholly owned by the customer.

The AI chat system draws from this data and documents in any format to reply to queries about beauty regulations, performance, and information related to the ingredients of a formula or raw material.

The chat tool can, for example, inform a user which components of a shampoo formula have allergenic concerns. To take another example,



CARA AI from The Good Face Project allows beauty pros to converse with a narrowly trained generative AI interface, thereby accelerating the development process and quickly addressing questions and concerns.

Courtesy of The Good Face Project

[a]www.mckinsey.com/capabilities/operations/our-insights/adopting-ai-at-speed-and-scale-the-4ir-push-to-stay-competitive

CARA Chat can also help users determine defensible product claims.

In all cases, The Good Face Project says, answers are precise and instantaneous.

The Good Face Project argues that CARA Chat can help product innovation teams, sales leads and other beauty professionals move quickly.

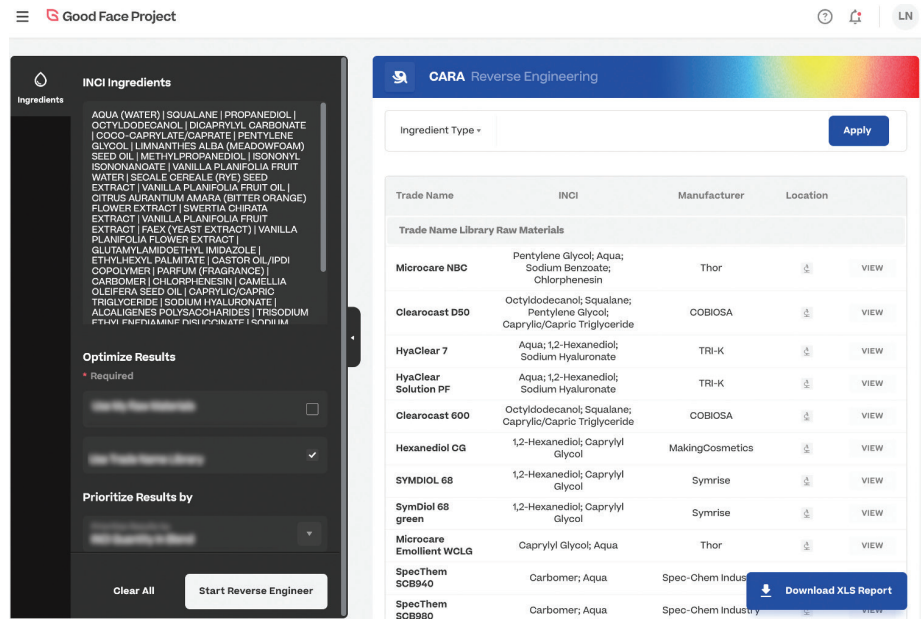
Reverse Engineering Beauty at Speed

Brands have been reverse engineering products for as long as the industry has existed, whether to create improved competitive SKUs or to generate dupes. However, new tools are making that process easier and faster.

The Good Face Project's Reverse Engineering Module, for example, purports to speed up the R&D formulation development process by allowing users to upload a full list of ingredients—for instance one copied and pasted from a retailer website—and use that list to recreate the formula by pulling information from a database of more than 40,000 trade-named materials.

The reverse-engineered formula can be consulted to identify the purpose of ingredients and can be adjusted to tweak formula price or swap out any ingredients that send up red flags for regulatory, safety or other concerns.

Users can also customize formulas by adjusting concentrations or swapping out materials to increase efficacy or optimize price.



The Good Face Project's Reverse Engineering Module purports to speed up the R&D formulation development process by allowing users to upload a full list of ingredients—for instance one copied and pasted from a retailer website—and use that list to recreate the formula by pulling information from a database of more than 40,000 trade-named materials.



AI tools can reportedly help brands of every scale move more quickly by leveraging accurate, timely data in a user-friendly interface.

And, for beauty detectives, assessing ingredient compositions against market ingredients can uncover which specific captive materials a competitor is using.

Users of the system can also read the "mood" of product reviews correlated with specific claim benefits or compositions, allowing product developers to anticipate shopper "liking."

In addition to reverse engineering or benchmarking products, the module can also reportedly help brands and contract manufacturers accelerate ingredient discovery and identify new suppliers.

In all, The Good Face Project believes the module allows teams to arrive at market-ready formulas in seconds.

AI-powered Innovation Begins with Good Data

Underlying The Good Face Project's technology is the company's data. Notably, its Ontology Search Module comprises more than 140,000 molecules, including ingredient properties, related research papers, and safety info and regulatory compliance data such as impurity profiles.

From top: courtesy of The Good Face Project; StratfordProductions

This underlying database supports The Good Face Project's predictive algorithms to support innovation decision-making processes for brands, contract manufacturers and ingredient manufacturers.

Combined, tools such as these can help brands of every scale move more quickly by leveraging accurate, timely data in a user-friendly interface.

"Identifying 140,000,000 molecules was not the biggest hurdle: the processing and structuring of such a large data graph is what other companies are not able to do today," says Iva Teixeira, cofounder and CEO of Good Face Project.

"Indeed, we leverage our own proprietary AI, CARA, that is helping us 24/7 to manage our data at an unprecedented speed and efficiency," adds Lena Skliarova-Mordvinova, cofounder and CTO of Good Face Project.

Further upstream, new AI innovation is reshaping ingredient discovery and adoption.



Using AI models, large datasets and automated biochemistry, users can connect the dots between natural protein sequences and novel applications.

AI-driven Protein Discovery

Shiru, a company using AI to optimize the discovery, development and scale up of proteins for personal care and other industries, has launched the ProteinDiscovery.ai marketplace, featuring 33 million molecules/protein sequences.

Molecules can be searched by sequence, functional use and successful expression, per Shiru, via a basic web interface.

Using AI models, large datasets and automated biochemistry, users can connect the dots between natural protein sequences and novel applications.

Companies can then use the ProteinDiscovery.ai platform to test those proteins and, if successful, purchase the property rights to these materials in perpetuity for application in product innovation.

In this way, Shiru claims,



Courtesy of Shiru;

ProteinDiscovery.ai creates new biobased ingredient intellectual property.

The company claims that this process "can save companies millions of dollars in R&D costs—and years of work," thereby accelerating personal care innovation by simplifying the search for efficacious ingredients that meet clean label or stability demands.

Shiru has already launched one personal care technology on its own, OleoPro, a structured fat that replaces palm and coconut oil and cocoa butter in personal care.

According to the company, "The highly tunable protein technology powering OleoPro allows oils to be used in new ways to deliver a range of previously impossible functionality for food and consumer products..."

"With ProteinDiscovery.ai we've made the world of natural proteins for industrial applications accessible," says Shiru founder and CEO Jasmin Hume, Ph.D. "We've even added the ability for users to easily purchase samples, creating the 'Amazon for proteins.' We've been using AI to identify high-value, novel, scalable proteins for years, fueling our own product development. With significant recent interest from CPGs and ingredients companies alike, we decided to open our toolbox to everyone."

Firms are also tapping AI to remove bias from skin/age diagnostics.

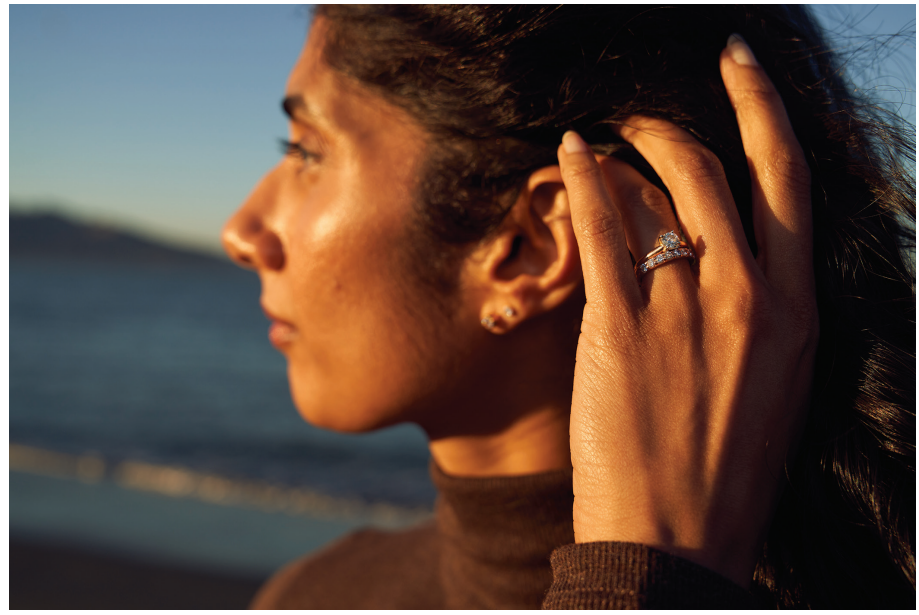
Unbiased AI Age Analyses

Accurate estimates of chronological age can be assessed by AI simply via hand images and are as accurate as facial analyses, per a new publication from the team behind Haut.AI.

This methodology reportedly overcomes "potential biases that can arise from facial recognition systems due to factors like ethnicity and facial features," per Haut.AI.

According to the authors, the use of hand images for accurate age prediction "offers a viable alternative to traditional facial photo methods and promotes fairer AI solutions."

The publication, in the journal *Experimental Dermatology*, is titled[b] "Predicting human chronological age via AI analysis of dorsal hand versus facial images: A study in a cohort of Indian females."



According to the authors, the use of hand images for accurate age prediction "offers a viable alternative to traditional facial photo methods and promotes fairer AI solutions."

The report details the use of AI models trained on hand images to match the accuracy of facial image chronological age estimates.

By using Indian individuals, the AI model reportedly demonstrated efficacy across a range of skin types, ensuring inclusivity.

The study also revealed key hand age markers including wrinkles, knuckles and bone prominence. Addressing the appearance of these three factors could potentially impact human-perceived aging as well, Haut.AI argues.

"Our research demonstrates that your age can be determined just as accurately from a picture of your hands as from your face," says Anastasia Georgievskaya, the CEO of Haut.AI. "This not only opens doors for new applications of AI technology but also has the potential to mitigate biases often associated with conventional systems. This aligns perfectly with our commitment to developing fair and responsible AI solutions."

Beyond AI tech, a number of platforms offer enhanced capabilities for the beauty industry.

Improving the Claims Testing Process

Skinobs' V2.0 supports and reportedly simplifies research projects by connecting beauty professionals with clinical and preclinical test options, laboratories, and/or consultants in a digital platform.

Users can select service categories such as efficacy, microbiology, penetration, UV, physico-chemical, etc., claims targets, and regions and then get a list of available service providers. Providers are profiled down to the equipment they have available for testing.

Taking a matter of minutes, according to Skinobs, key features of the upgraded platform include project management tools, a private integrated messaging system, Q&A support and a simplified interface.

Skinobs offers two platforms

[b]https://onlinelibrary.w iley.com/doi/full/10.1111/exd.15045

Image by Shellby Macena at Adobe Stock

dedicated to preclinical assays (in silico, in vitro or ex vivo) and clinical evaluation (in vivo on humans) to reportedly optimize product development in terms of performance, cost, speed and innovation.

The latest platform upgrade comes amid escalating demand for proven efficacy in beauty.

"Testing cosmetics products is at the heart of the beauty industry and is the key to success," says Anne Charpentier, CEO and founder of Skinobs. "Our objective today is to function as a central hub where laboratories and cosmetics professionals converge. With Skinobs, we strive to facilitate collaboration and communication between these two essential industry entities."

Suppliers are also simplifying claim and label compliance.



BASF's Ingredients Revealed "digital lab" concept allows users track formulations' biodegradability and renewable carbon content in real time.

A Digital Lab for Easy Compliance

BASF's Ingredients Revealed upgrade, added to its D'lite digital platform, is designed to enhance access to transparent information on cosmetic formulations.

Users can access ingredient and formulation information using search criteria such as labels, standards and sustainability parameters.

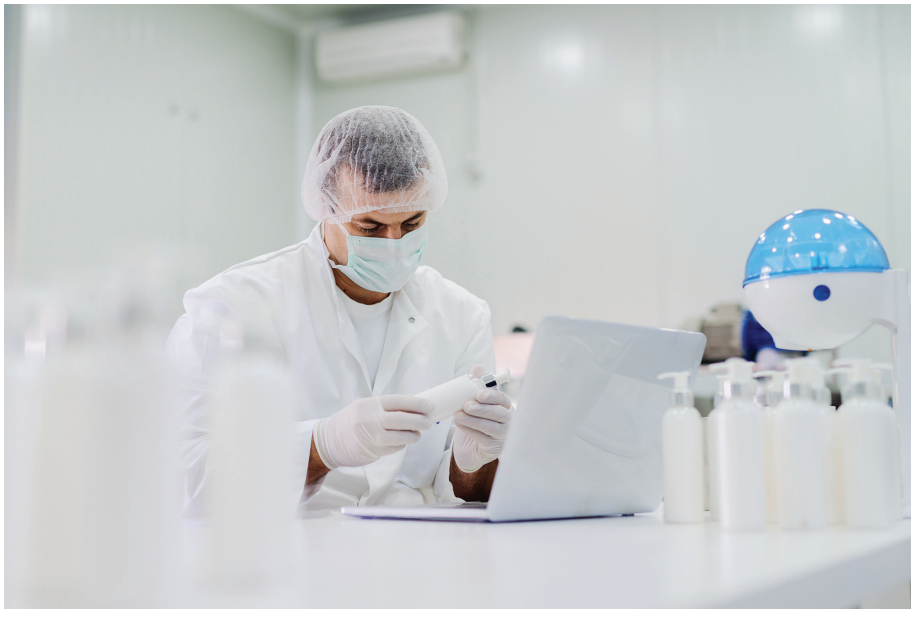
This allows professionals to modify formulas in real time and see the impact on various claims/parameters.

This "digital lab" reportedly takes BASF's D'lite service platform to the next level by helping brands respond to the rising number of standards and labels issued by certifying agencies, regulators and retailers, which ultimately shape shopper choices.

How it works:

- Users browse BASF's formulation database to identify candidates that meet targeted consumer demands
- Users can add or delete individual ingredients to these preexisting formulas or generate built-from-scratch formulas, all the while tracking the impact of ingredient selection on the formulas' compliance with targeted labels, claims, etc.
- Using this "digital lab" functionality, users can track biodegradability and renewable carbon content in real time
- Notably, users can import their own ingredients

"With our new tool, we enable users to create or upload their own formulations and see changes happen instantly while customizing them," says Aleksandra Pienczykowska, manager, digital customer channels EMEA, at BASF Care Chemicals. "This way, they get real-time transparency on different criteria which significantly simplifies the development process for formulations." ■



Skinobs' V2.0 supports and reportedly simplifies research projects by connecting beauty professionals with clinical and preclinical test options, laboratories, and/or consultants in a digital platform.

From top: image by BullRun at Adobe Stock; courtesy of dusanpetkovic1

9 TAKEAWAYS FROM 20 YEARS OF BRAND GROWTH

While we have 20 years under our belt, it often feels like we are still a startup.

BY ADA POLLA, CEO, ALCHIMIE FOREVER



Author Ada Polla at left in 2015 with an intern. Polla writes, "Our industry thrives on newness—we overemphasize new and underemphasize core."

Images courtesy of Alchimie Forever

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This year, Alchimie Forever turns 20. I love this brand, I love helping people with their skin, and I love working with our wonderful partners. This project has been, and still is, a passion for me, and I thought I would take some time to write about the journey these last 20 years have been.

A Science-based Foundation

Before I talk about the lessons I have learned, let me briefly outline how Alchimie Forever came to be.

We did not decide to launch a skin care brand, sit in a board room to strategically identify "white space" in the industry, or conduct focus groups.

Our origin story begins with two medical doctors, the leading dermatologist in Switzerland (my father, who played a pioneering role in the use of lasers in dermatology) and a Harvard fellow (my mother, a leading researcher in the field of antioxidants and iron chelation).

Our brand only came to be when my parents and a compounding pharmacist set out to create a post-procedure product to help heal the skin of children being treated with pulsed dye lasers for their port wine stains and hemangiomas.

That treatment, known today as the Kantic Brightening Moisture Mask, is still our hero product, and was the start of this beautiful journey.

Now, I'd like to share some lessons learned between the creation and launch of that product and the present.



Our origin story begins with two medical doctors, the leading dermatologist in Switzerland (my father, who played a pioneering role in the use of lasers in dermatology) and a Harvard fellow (my mother, a leading researcher in the field of antioxidants and iron chelation). Pictured are pre-launch Alchimie Forever product concepts.

1. Boostrapping and Timelines

We are family-owned, family-funded, and have bootstrapped our business from the beginning. This means we don't have money to make big mistakes; we have grown carefully and sustainably, without squandering cash on marketing experiments that did not work. We have had to use a lot of financial discipline and show a lot of restraint.

Being self-funded has come with the advantage of looking at our business with a long-term perspective. We can remain true to the soul of our brand, which is providing the highest quality clean products steeped in clinical science.

A very successful and very well-funded beauty entrepreneur once told me, "Time is your enemy." I disagree.

We are building a brand that we want to last for generations. This requires patience and time, which is not in alignment with the objectives and speed of private equity. Ownership has enabled us to take a different approach to time.



Ada Polla and her father, Luigi L. Polla, MD.

2. DROOM: Don't Run Out of Money

This is an acronym coined by Marla Malcolm Beck, the cofounder of Bluemercury. I remember reading

Click above to play

about this in one of her early interviews and it stuck.

Yes to being bootstrapped, yes to restraint and financial discipline. And if you run out of money, none of that matters anymore.

This rings even truer today given the beauty brand closures of the last 18 months, both large and small, both bootstrapped and well-funded.

Whether you have a little or a lot of it, don't forget: DROOM.

3. Growth vs. Profitability

What matters most, high growth rates or profitability? This is like the chicken and egg question equivalent of our industry.

There are strong, passionate arguments on both sides. And there is probably not one right answer, but the right answer for each brand, each situation.

Given our bootstrapped status, we have had to focus on reaching breakeven. Refer to DROOM above.

It took us a few years to get there, and once we did, we held on to that profitability at all costs. As a result, our growth has been thoughtful and sustainable.

About 10 years ago at an industry event, I was speaking about my brand to an investment banker well known in our industry. He had discovered our Skin Repair Gel and was a fan.

Being an investment banker, he asked me about our sales and financials, and I answered truthfully. He said, "Your products are better than your revenues."

I decided to take that as a compliment. We were smaller then; we are still small today. And we are profitable.

4. Productivity Drives All

Don't be seduced, or distracted, by huge opening POs. What matters is sell-through.

Focus on productivity at the point of sale. This is true both online and in brick-and-mortar.

The first order is the easiest one. Getting customers or wholesale partners to repurchase is the proof of concept.

We have built long-term relationships with our consumers: many have been purchasing our products for upwards of 15 years. We have built long-term relationships with our wholesale partners: I can count on one hand the retail or spa partners that have broken up with us (not counting the few that have closed—always heartbreaking).

5. Risk On, Risk Off

A multi-brand marketer with whom I had the privilege to meet told me that the key to running a business for the long term is to understand if we are in a "risk on" or "risk off" moment.

Risk on is for when the economy is growing, macro-economic factors are positive, consumer spending is up. The first half of 2022 is the last time I remember the feeling of "risk on."

Since then, wars, inflation, high consumer debt, low consumer savings and continued supply chain disruptions have contributed to a "risk off" feeling.

The key is to be in tune and aware, and to pivot quickly, to invest or to save accordingly.

6. New Product Launches

Everyone always asks, "When are you launching a new product?" Or, "What's coming down the pipeline?"

Our industry thrives on newness—we overemphasize new and underemphasize core.



Luigi L. Polla, MD, pictured with the brand's Skin Repair Gel.



Alchimie Forever packaging, circa 2004.



"What matters most, high growth rates or profitability? This is like the chicken and egg question equivalent of our industry," says Ada Polla (second from left), pictured here with her sisters.

We have not given in to this frenzy, partly because we never want to launch anything that feels frivolous and partly because launching new products is expensive, in both human and financial resources, and we can't get it wrong.

We launch products thoughtfully and selectively. Our launches are fewer and far between, and thus more special.

7. Tik Tok Sensations

I woke up on a Saturday morning in July 2021 and checked my email, per normal. Confession: I still get a copy of every online order anyone places on our website. Without looking at them specifically, this gives me a general sense of whether our online sales are up or down."

That morning nearly three years ago, I was scrolling and scrolling and all I saw were online orders, 99% of them for our Firming Gel for Neck and Bust— about 100x a normal day.

My first thoughts: we have been hacked, or our website broke. Upon further investigation, I also had several emails from key wholesale partners asking me about their spike in sales for this product and sending replenishment POs.

It turned out that a video of our Firming Gel for Neck and Bust had gone viral on Tik Tok. This might have been one of the best weekends of my life—until I realized two things: 1) We were not yet on Tik Tok and missed out on all of those followers, and 2) We sold out of 6 months of this product's inventory in three days and were out of stock for 4 months.

Was going viral the end all, be all of success? It was not. It did make for great July sales numbers however.

8. Things Happen for You, Not to You

After COVID, I decided it was time I look for a permanent home for my brand. A home where it would be nurtured and given the fuel and expertise I could not give it on my own.

I reached out to my network and had conversations with investment bankers, private equity leaders, family office founders, brand incubators and owners who had sold their brands.

Throughout these conversations, I found "the one." I found the company that I became convinced would be the perfect home for Alchimie.

Over the course of the following year, the CEO and I had a few Zooms. We hit it off, talked clean science, discussed how my brand would strategically complement his current assortment, reviewed products, and began ideating a path forward.

Then abruptly, the conversations came to a halt. "It's not the right time for us," he said.

I would be lying if I didn't say I was disappointed. I pivoted and went back to focusing 100% on growing my business, trusting that the timing would work itself out.

Twelve months later, "the one" filed for Chapter 11. Most of the brands under its umbrella were shut down. A couple were sold for pennies on the dollar. Had things happened the way I "wanted" them to, I would most likely not be writing this article today.

9. Redefining Success

In business school, they teach you to define your exit when you launch your business. In the industry, success is defined as an exit where the founder cashes out, selling to a strategic or private equity firm.

While that might be a sexy definition of success, success can look different. In my world, success looks like building a profitable business



Author Polla, standing second from right, pictured with her sisters, as well as her father Luigi L. Polla, MD (seated).



"In business school, they teach you to define your exit when you launch your business," writes Ada Polla, pictured at center in 2017 with two interns. "In the industry, success is defined as an exit where the founder cashes out, selling to a strategic or private equity firm."



Alchimie Forever products and packaging, circa 2024.

for the long term, retaining control and ownership, improving people's skin one at a time, creating jobs and participating in the economy, and mentoring and growing a happy team.

Success looks different for different people, for different brands. I wish, as an industry, that we spoke about this more.

A Moment of Appreciation Before the Next 20 Years

While we have 20 years under our belt, it often feels like we are still a startup. Our world and our industry are widely different than they were 20 years ago. That is what keeps things interesting, and I can't wait for the next 20 years.

This year, however, I celebrate. We have built trust and credibility with our wholesale partners and customers. We have remained authentic and true to our origin story. We have made it through economic crises, wars, and a global pandemic. We have continued to grow.

We have stood the test of time, and that is worth celebrating. ■

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