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SEPTEMBER 2024



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THE SUNIFICATION OF BEAUTY

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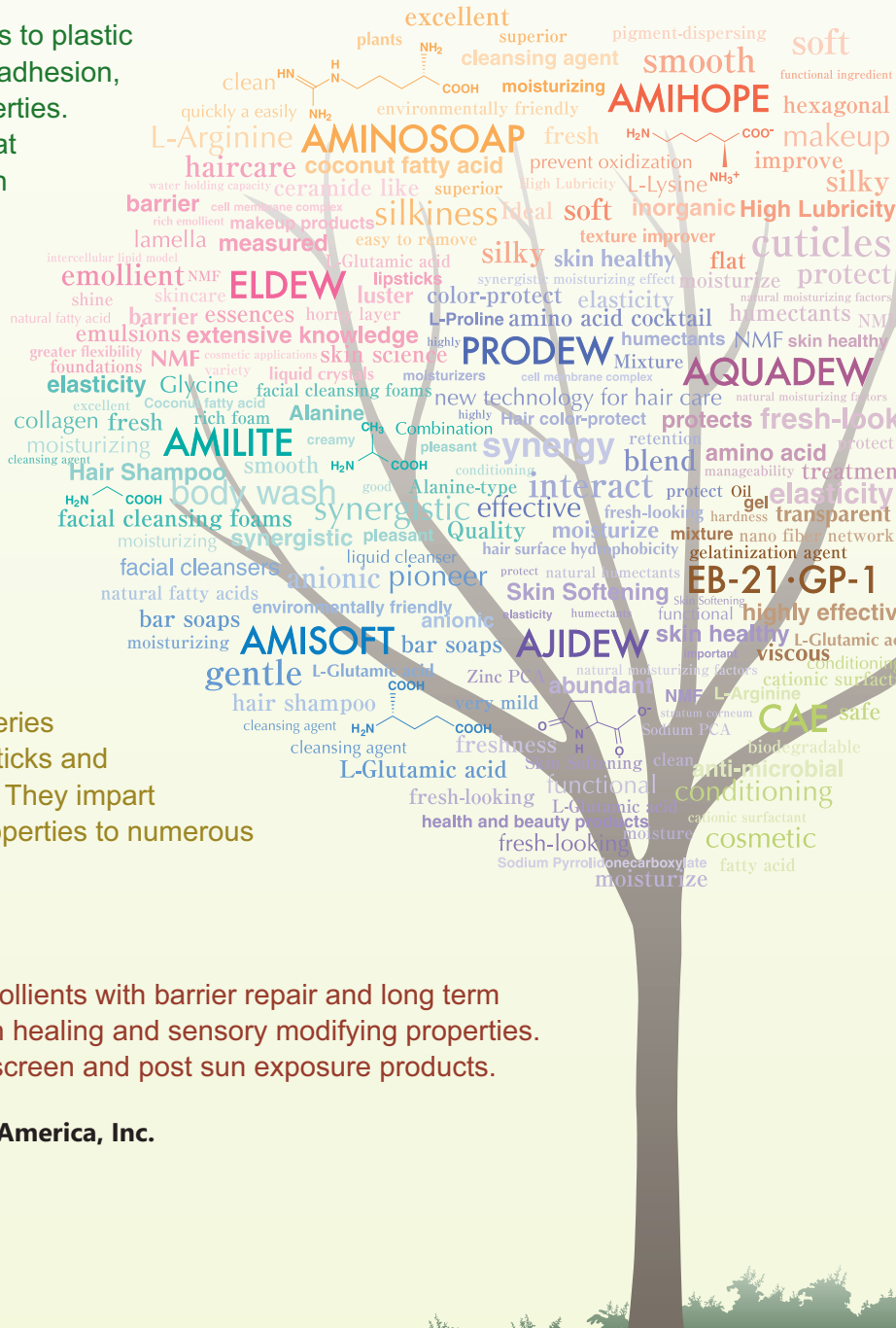
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Clean Beauty is Being Reshaped by Democratization & Demands for Proven Efficacy

Clean beauty consumers are increasingly low-income, according to a recent Social Standards report, pointing to a rising democratization of the category. At the same time, higher-income shoppers are migrating toward clinically effective and expert-backed brands. What does this mean for the future of clean beauty?



The adoption of clean beauty by lower-income shoppers is having a significant impact on the category.

Consumers Have an Efficacy-first Mindset

Clean beauty has long been dogged by a lack of clear definitions or regulatory clarity, which has increasingly challenged vague claims and benefited brands with demonstrable clinical efficacy.

As previously reported, in its 2024 wellness report, McKinsey noted that, "Roughly half of U.K. and U.S. consumers reported clinical effectiveness as a top purchasing factor, while only about 20% reported the same for natural or clean ingredients."

At the same time, the report explains, "Consumers said they are most influenced by doctors' recommendations when seeking care related to mindfulness, sleep and overall health," including the selection of personal care products and vitamins.



"Efficacy appears to be of increasing concern to clean beauty consumers, who are challenging brands to not only create a product free of harmful ingredients, but one that also generates results," Social Standards notes.

Social Standards appears to concur: "Efficacy appears to be of increasing concern to clean beauty consumers, who are challenging brands to not only create a product free of harmful ingredients, but one that also generates results."

The firm points out that "'dermatology tested' has seen an over 50% increase in share of the category on Instagram [year-over-year], which may also indicate growing attention to product efficacy."

And, while efficacy has long been a feature of Instagram clean beauty conversations, it has now begun to spike on TikTok, particularly in the last two years, per Social Standards data.

At the same time, Social Standards found that technical, clinically positioned ingredients such as vitamins (particularly E) and retinol and retinol alternatives are taking over the clean beauty social media



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conversation at the expense of natural ingredients such as jojoba and palm oil.

This isn't evidence that clean concepts are going away; instead, it points to an efficacy-first mindset among shoppers.

The Impacts of Clean Beauty's Democratization

The adoption of clean beauty by lower-income shoppers is having a significant impact on the category.

Notably, mid-income consumers are most likely to join the clean beauty conversation on TikTok, while higher earners are more likely to engage with the sector on Instagram, which may in part be related to average users' ages: 16-24 for TikTok and 25-34 for Instagram.

That said, Social Standards' report claims that the typical clean beauty shopper is age 30 or older, white and female-identifying.

Across both platforms, however, participation of higher-income shoppers is diminishing.

This may be good news for clean beauty brands, which have typically operated under the perception that the category is solely for wealthier consumers.

Conversational keywords point to this shift. Per Social Standards, terms like "pricing" are increasingly common in Instagram clean beauty conversations. On TikTok, terms like "discount" and "affordable" are popping up in clean beauty chatter.



Notably, mid-income consumers are most likely to join the clean beauty conversation on TikTok, while higher earners are more likely to engage with the sector on Instagram, which may in part be related to average users' ages: 16-24 for TikTok and 25-34 for Instagram.

What's Next for Clean Beauty?

Looking ahead, brands that wish to succeed in the clean beauty space with high-, mid- and low-income shoppers will need to:

- Deliver clear efficacy
- Adopt clinically effective actives
- Price for mid- and low-income shoppers ■

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INSIDER INSIGHTS:

TOP HAIR, COLOR, SUN CARE & PACKAGING TRENDS REVEALED



Featured insiders…

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- Micro Powders
- Provital
- Sharon Personal Care
- Solabia
- Spectra Colors
- Sun Deep
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- Uviva Technologies
- Viva Healthcare Packaging

Suppliers open the vaults to reveal how shopper behaviors are reshaping innovation across categories an sectors.

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TOP-TRENDING COLORS ACROSS CATEGORIES

"Color trends in marketing and product design, especially those utilizing FDA-approved dyes, shift seasonally to align with consumer expectations and functional performance needs," explains Alexis Capik, president of Spectra Colors Corp.



FD&C Blue 1 is trending in hair care, gummy supplements, pharma and food, according to Spectra Colors.

Spectra Colors, a New Jersey-based supplier of dyes, colorants and related services, tracks the trending colors at any given moment. Most recently, it has identified three trending tones:

- D&C Red 28 in pharmaceutical products
- D&C Red 33 in hair care
- FD&C Blue 1 in hair care, gummy supplements, pharma and food

"Color trends in marketing and product design, especially those utilizing FDA-approved dyes, shift seasonally to align with consumer expectations and functional performance needs," explains Alexis Capik, president of Spectra Colors Corp. "In marketing, leveraging these trends is crucial for maintaining relevance and appeal."

She continues, "Bright fluorescent colors, for instance, tend to appeal to a younger generation, resonating with their preference for vibrant and energetic aesthetics. These colors are often associated with modernity and innovation, making them ideal for products targeting a youthful audience."

Capik adds, "On the other hand, bold, deep colors convey a sense of sophistication and reliability, appealing to more mature consumers who value elegance and timelessness. These hues are perfect for products that aim to project a premium, high-quality image." ■

Image by Spectra Colors at Adobe Stock

TOP SUN CARE TRENDS

From consumer confusion to novel photoprotection, the sunification of beauty is increasingly complex.



Image by puhhha at Adobe Stock

"Consumers may find it difficult to understand and compare products when SPF labeling and regulations differ," says Sundeep Gill, PharmD, co-founder of Sun Deep Inc. "For instance, what constitutes SPF 30 in one country might not be the same in another due to different testing criteria."

Global Cosmetic Industry recently surveyed experts in sun care to surface the latest trends, which include regulatory complexity, new photoprotection materials and more.

Consumer Confusion Around Sun Care is Profound

"Consumers no longer want to choose between sun protection and skin care, and they demand ethical, sustainable and inclusive products," says Margaret Sullivan, technical service scientist at Arcaea. "In the United States, limited UV filters are available to formulate effective sunscreens, making it difficult for brands to satisfy these consumer needs. While the trend toward improving aesthetics and reducing white-cast has led to a rise in the incorporation of SPF boosting technologies, it is now followed by growing criticism from consumers, questioning the safety profile and misleading 'mineral-only' claims of products loaded with additives that are technically chemical filters."

A Complex Sun Care Regulatory Environment

"Consumers may find it difficult to understand and compare products when SPF labeling and regulations differ," says Sundeep Gill, PharmD, co-founder of Sun Deep Inc. "For instance, what constitutes SPF 30 in one country might not be the same in another due to different testing criteria. SPF effectiveness can vary depending on how it's tested and regulated. Some regions might have stricter testing protocols or include different factors (like water resistance) in their SPF ratings, leading to discrepancies in actual protection levels."

Gill notes, "Companies may need to formulate different versions of their products to comply with various regulations, which can lead to increased costs and complexity in manufacturing and distribution. Differences in SPF regulations can create barriers to international trade for sunscreen products. Companies may need to meet multiple regulatory requirements to sell their products globally. Companies exporting sunscreen products need to navigate multiple regulatory frameworks, which can be costly and time-consuming."

He adds, "Compliance with different testing standards adds complexity to product development and marketing. Inconsistencies in SPF regulations could potentially impact consumer safety if products marketed as having a certain level of protection do not meet the expected standards in a particular region. Companies may face a significant regulatory burden due to the need to comply with multiple sets of SPF regulations. This can lead to delays in bringing products to market and increased launch costs."

Unique Approaches to Photoprotection

"At Arcaea we are very excited to have initiated limited sampling of Gadusol, a naturally occurring compound first identified in fish roe that has unique photoprotection benefits," says Sullivan.

She adds, "We created a biosynthesis approach for manufacturing Gadusol, addressing the environmental concerns and commercial inviability of extracting from marine life. This is a new era for photoprotective skin care, where biotechnology enables us to offer an efficacious solution that resonates with the burgeoning demand for sustainable, eco-friendly consumer products."

Sullivan concludes, "A very small amount of Gadusol in formulation unlocks the opportunity for sustainably sourced photoprotective skin care benefits that also significantly improve the aesthetics of SPF products."

Multi-benefit Sun Care

"Modern consumers seek more than UV protection; they want sun care products that also offer skin care



Courtesy of Arcaea

"At Arcaea we are very excited to have initiated limited sampling of Gadusol, a naturally occurring compound first identified in fish roe that has unique photoprotection benefits," says Sullivan.



"Enriched with vitamin E and omega 9, JD Jojoba Oil helps restore skin moisture and balance," says Jojoba Desert's Roni Rot. "It is a vital component in our sun care and after-sun products, soothing the skin from sunburn while promoting skin rejuvenation and nourishment."

benefits," says Roni Rot, CEO, Jojoba Desert. "This trend stems from a desire for convenience and greater value, as consumers prefer products that deliver multiple benefits in one application."

"It seems like many brands are launching sunscreens that leave a bronzy or glowy finish on the skin," says Toussaint Jordan, marketing manager, Solabia USA and Applechem. "These products are simple but genius because chemical sunscreens can make skin look greasy and mineral sunscreens can make skin look chalky. The addition of bronzy or glowy pigments counteracts the greasiness and chalkiness to give a more desirable finish. I have also noticed sun care products becoming more targeted. For example, I've seen sunscreens specifically for tattoos and sunscreens for often forgotten areas like the scalp."

Solabia and Applechem have put these trends into motion, says Jordan.

The marketing manager explains, "We recently launched a prototype formulation called Mineral Glow Skin Calming Elixir, SPF 55. It is a low-viscosity, high-SPF zinc oxide sunscreen with an enchanting sensory experience and a transparent finish. The goal of this prototype formulation is to show chemists that it is possible to achieve a high SPF zinc oxide sunscreen with an elegant feel on the skin. The SPF and sensory experience are achieved using a combination of our G-Block, S-Block DZ CocoDerm, and Sensogel Novus."

"We're seeing the 'skinification' trend now influencing sun care—essentially infusing skin care ingredients like brightening, bronzing and moisturizing actives in innovative sun care launches," says Jen King, director of marketing, cosmetic ingredients NA, Symrise. "Another trend we're seeing is multi-functional and hybrid formats that are providing all-in-one sun care solutions, for instance bronzers, primers and serums blended with SPF."

King adds, "Consumers are desiring effective sun care formulas that also provide refreshing moisturization like Hydroviton Insta, which is crafted from upcycled French cucumbers. Although a smaller segment of the sun care market, we're also seeing a need for calming after sun care products with soothing ingredients like our newest sensitive skin launch, SymCalmin Avena, which calms the skin and reduces redness."

Courtesy of Jojoba Desert

Consumer Preference Shifts in Mineral Sunscreens

"A very clear trend that has intensified in the past year [or so] is the demand and request for all-zinc oxide formulations, enhanced by various boosters," says Jeroen van den Bosch, managing director, Uviva Technologies. "More and more consumers are trying to stay away from TiO_2 based sunscreens due to negative press in powder, makeup and sprays. The main challenge and quest for most formulators is to find ways to make such sunscreens aesthetically pleasing, meaning transparent and easy to use."

Van den Bosch continues, "The major launch of Uviva was Eclipse Z1 in 2023, a grade of zinc oxide with a new and specific morphology that has two main effects. The first is that it provides transparency levels that are the best in the industry today, while not sacrificing the SPF and UVA performance like most other transparency zinc oxides do. Secondly, the regular morphology of Eclipse Z1 has an extremely low impact on oil phase viscosity; this directly translates in the overall sensorial aspects of a formula. Blind panel studies showed that identical formulations using Eclipse significantly perform and score better on aspects such as skin feel, formula spreadability and transparency."

The company will reportedly be launching a new booster in September 2024; the technology reportedly enhances SPF significantly beyond what is possible with commercially available materials.

New SPF Boosters & More

"Natural SPF boosting powders that significantly improve the performance of actives, are sustainably sourced, are biodegradable and are proven effective are in high demand," says Sue Sender, director of marketing, Micro Powders, Inc. "It's crucial that the ingredients being increasingly used in sun care do not have damaging effects on the environment, and it's equally important that ingredients enhance aesthetics in formulations to impress consumers."

Sender adds, "Micro Powders continues to develop and test our best performing natural raw materials for SPF boosting, including upcycled rice bran wax and sustainably sourced SuCCESS Castor Oil and cellulose. Newfound data has encouraged expansion into new applications in skin care and cosmetics, offering added creativity to formulators in developing unique products."

Other suppliers are also focused on ingredients that enhance the sun care experience.

"Enriched with vitamin E and omega 9, JD Jojoba Oil helps restore skin moisture and balance," says Jojoba Desert's Rot. "It is a vital component in our sun care and after-sun products, soothing the skin from sunburn while promoting skin rejuvenation and nourishment. Incorporating JD Jojoba Oil, known for its hydrating and soothing properties, enhances product performance while offering effective and gentle solutions for the skin."

The executive adds, "Aligning with the trend toward sensory satisfaction, JD Lusteris provides a lightweight, non-greasy ingredient that enhances the skin with a subtle glow. This product appeals to those seeking beautification with protection, offers a soothing effect, and deep moisturization, and adheres to environmentally sustainable practices."

Rot concludes, "These products demonstrate Jojoba Desert's proactive stance on leveraging natural efficacy and a comprehensive understanding of market needs. Our product lines reflect our commitment to delivering high-quality, innovative and sustainable cosmetic solutions." ■



5 TOP COSMETIC PACKAGING TRENDS

We recently surveyed experts in cosmetics packaging to surface the latest trends, which include 3D deco printing, airless glass, body care, single-dose sampling options and more.



Anson adds, "Another growing trend is the use of vibrant colors and bold photo quality designs, exemplified by our latest launches with Maui Vera and their sun care range. Our patented IML tube technology allows eye-catching graphics that span the entire tube, from shoulder to crimp, transforming a simple tube into a vibrant work of art."

Courtesy of ICONS America

Global Cosmetic Industry recently surveyed experts in cosmetics packaging to surface the latest trends, which include 3D deco printing, airless glass, body care, single-dose sampling options and more.

1. Eco-friendly Cosmetic Packaging Materials

"In terms of packaging trends, sustainability remains a focal point," says Jeff Carbone, sales manager, south region, at Baralan USA. "Baralan not only offers PCR materials ranging from 30% to 100%, but also a comprehensive line of 100% virgin plastic alternatives. We've introduced an organic scraps line that utilizes materials such as coffee peel and rice husks, alongside plastic closures free from carbon black and bio-based materials featuring biopolymers derived from renewable resources and natural materials not associated with the food chain."

"Brands are increasingly incorporating more PCR (post-consumer recycled) material into their packaging to align with ESG commitments and meet consumer demand for more responsible packaging," says Melanie Gaudun, business development and marketing manager, Viva Healthcare Packaging. "At Viva, we offer up to 87% PCR in tube sleeves and up to 100% PCR in tube applicators, closures, oval tube shoulders, sticks, and jars. Currently, more than half of our packaging includes PCR, and that number is growing."

"With our IML tubes, achieving the 'wow' effect doesn't come at the cost of the environment and provides brands packaging where luxury and sustainability go hand-in-hand," says Amanda Anson, ICONS|America's marketing manager. "The entire tube is made with PP materials, suitable for curbside recycling and is also available with PCR. As an added bonus, our on-shore USA manufacturing facility near Charlotte, North Carolina, reduces carbon footprint and shortens shipment delivery lead times to North American locations."



"Another launch that we are excited about is our 3D printing decoration," says Carbone. "Baralan has the ability to add dimension to our bottles and caps in a completely innovative way.

Courtesy of Baralan

2. Airless & Refillable Cosmetic Packaging Formats

"One of our standout launches is the premium version of our airless glass packaging," says Carbone. "As our airless glass containers gain popularity in the market, we've innovated further by introducing a 'recharge' feature for our 30 ml bottle. Emphasizing sustainability, this luxury outer shell can be integrated with the bottle, eliminating the need for disposal. Subsequent orders only require the bottle and service cap, making this package a distinctive offering that enhances any brand's image."

3. Sustainable Deco with a Wow Factor

"Another launch that we are excited about is our 3D printing decoration," says Carbone. "Baralan has the ability to add dimension to our bottles and caps in a completely innovative way. Brands can create dynamic designs that will literally stand out on our packaging. The brilliant contrast of the 3D printing to the bottle, jars or cap is certainly unique to the marketplace."

"One major packaging trend we are seeing is 'minimalism with personality,' which combines clean, simple designs with unique, eye-catching elements," says ICONS|America's Anson. "The unlimited decoration capabilities of our IML (in-mold labeling) tube technology enables brands to capture this trend perfectly, allowing complicated multi-finish matte and gloss artwork designs with a vibrant metallic or holographic effect or subtle but stunning decoration accents. These details allow brands to embrace minimalism while maintaining individuality."

Anson adds, "Another growing trend is the use of vibrant colors and bold photo quality designs, exemplified by our latest launches with Maui Vera and their sun care range. Our patented IML tube technology allows eye-catching graphics that span the

entire tube, from shoulder to crimp, transforming a simple tube into a vibrant work of art."

She adds, "Our patented injection molded, IML tube technology helped bring Maui Vera's vibrant, intricately designed packaging vision to life, ensuring their products not only protect the skin but also align with environmental values. Maui Vera's packaging needed to capture the essence of the brand: vibrant, natural, and environmentally conscious."

Anson continues, "ICONS|America rose to the challenge, leveraging their expertise to create tubes using our advanced in-mold label printing technology that are as eye-catching as they are functional. The result is a range of sun care products encased in colorful tubes adorned with intricate designs that evoke the beauty and spirit of Hawaii."

"Our partnership with ICONS|America has been incredibly smooth and professional," says David McCord, president of Maui Vera. "Their team has consistently provided us with valuable support and resources, ensuring that our packaging needs are met promptly and effectively. Their commitment to quality and eco-friendly practices aligns with our values and sustainability goals."

4. Packaging for Beauty's Body Care Boom

"Viva is witnessing significant growth in the body care segment, especially as an extension of beauty care brands," says Viva's Gaudun. "Whole body deodorant is a notable emerging category for many brands. As a result, we are seeing increased demand for sticks in all sizes, from mini to standard, as well as tubes with wide applicators and various orifice patterns for body-wide application."

For example, Gaudun says, the "Ban Underboob Sweat Shield uses a 2.5 fl. oz. tube to tackle sweat protection in the bra-line with a wide applicator. This innovative packaging solution enhances user experience while emphasizing eco-friendly practices."

She continues, "Tubes are injection-molded in a calming green palette with a silky exterior. The wide applicator includes a soft TPE surface and a three-slot orifice for easy application. The translucent overcap, provides a continuous green visual from crimp to cap, in a mono-material polypropylene structure that ensures compatibility with recycling per APR guidelines. In addition, the tube sleeve features 87% recycled PP, while the applicator is crafted with over 95% recycled PP."

Gaudun concludes, "These tubes showcase the beauty of in-mold label decoration, with calming green Flexo inks, and spot gloss to emphasize the brand against a soft velvet background. In the Ban Underboob Sweat Shield tube, comfort meets sustainability in a greener user experience."

5. Single-use Samplers for Cosmetics

"In the competitive beauty industry, effective sampling campaigns are crucial," says Amy Pan, CEO, Epopack. "Traditional single-dose samplers often fail to deliver desired results, as they don't provide enough product for consumers to fully experience its benefits. Many customers find it hard to assess a product's effectiveness from a single use, making these samplers less impactful and potentially costly with minimal returns."

She continues, "A new trend, deluxe samplers, is revolutionizing the market. Offering a larger volume, these samplers allow consumers to use the product multiple times, providing a more comprehensive trial. This extended use period significantly increases the likelihood of customers recognizing the product's benefits and converting to full-size purchases."

Pan notes, "Moreover, deluxe samplers can be fully customized to match the look and design of full-size products. This consistency ensures that brands maintain their style and image, effectively communicating their identity and values. Deluxe samplers serve as miniature versions of the full-size product, enhancing the brand's appeal and perceived value."



For example, Gaudun says, the "Ban Underboob Sweat Shield uses a 2.5 fl. oz. tube to tackle sweat protection in the bra-line with a wide applicator. This innovative packaging solution enhances user experience while emphasizing eco-friendly practices."

In addition, she says, "Deluxe samplers offer a luxurious experience, aligning with the brand's aesthetic and building trust with potential customers. They represent a strategic evolution in beauty sampling, addressing the limitations of single-dose samplers by providing ample product and maintaining brand integrity."

Pan concludes, "For beauty brands aiming to make a lasting impression and drive conversions, investing in deluxe samplers can be transformative. As the beauty market evolves, deluxe samplers are proving that a more immersive sampling experience can significantly impact consumer perception and loyalty." ■

Courtesy of Viva/Ban

TOP HAIR HEALTH **TRENDS**

We recently surveyed experts in hair care to surface the latest trends, which include regulatory marine ingredients, defense against external stressors and more.



Image by sonyachny at Adobe Stock

"We've observed a shift in consumer behavior, where hair care practices are increasingly mimicking skin care routines," says Pascal Yvon, PharmD, MBA, general manager Americas, Sharon Personal Care, USA. "The consumers recognize that hair, like skin, shows signs of natural aging. This phenomenon is exacerbated by various environmental and chemical stressors including color treatment, bleaching, heat styling, ultraviolet (UV) radiation and pollution. These factors collectively contribute to the degradation of hair fibers, resulting in increased dryness, brittleness, and susceptibility to breakage and split ends."

Global Cosmetic Industry recently surveyed experts in hair care to surface the latest trends, which include marine ingredients, defense against external stressors and more.



"With consumers eager to challenge the beauty industry, applications in hair care have witnessed an era where defying traditional norms is becoming the new reality, driving innovations that transcend mere aesthetics in hair care," says Henrique Marconi, global product marketing manager, Chemyunion.

Targeting the Effects of Hair Aggressors

"We've observed a shift in consumer behavior, where hair care practices are increasingly mimicking skin care routines," says Pascal Yvon, PharmD, MBA, general manager Americas, Sharon Personal Care, USA. "The consumers recognize that hair, like skin, shows signs of natural aging."

Yvon adds, "This phenomenon is exacerbated by various environmental and chemical stressors including color treatment, bleaching, heat styling, ultraviolet (UV) radiation and pollution. These factors collectively contribute to the degradation of hair fibers, resulting in increased dryness, brittleness, and susceptibility to breakage and split ends."

He adds, "By leveraging the trends of skinification and advanced repair mechanisms, hair care brands can align with consumer expectations for healthier, stronger, and more youthful-looking hair."

Yvon points to SharoHyal Moringa as a key ingredient that can address many of these concerns, noting that it "acts like a vegan keratin, replenishing hair moisture, helping fight the signs of aging, and restructuring the cuticle from the inside out."

He adds, "It envelops each hair fiber, locking in natural moisture and sealing the cuticle, strengthening hair, making it more resilient, reducing breakage, and restoring vitality. The chemical interactions, namely the formation of hydrogen and ionic bonds between hair proteins and Sharohyal Moringa components—sodium hyaluronate and hydrolyzed moringa proteins—act at two levels. On the cuticle it surrounds the hair creating a protective layer. Also, thanks to their low molecular weight, sodium hyaluronate and hydrolyzed moringa proteins penetrate the fiber into the cortex, enhancing its strength and integrity. We've performed several ex-vivo studies on moringa, which confirm these claims."

Yvon concludes, "Sharohyal Moringa is the only product available in the market that combines two ingredients with proven efficacy for hair care products—moringa proteins and sodium hyaluronate. The product efficacy has been extensively demonstrated through ex-vivo tests and microscopic observation of strands treated with the ingredient. Ex-vivo studies showed its ability to create a protective layer on the hair cuticle, and to penetrate inside the hair cortex, resulting in a proven moisturization effect, elasticity enhancement of damaged hair, and ability to improve hair cuticle morphology."

Targeting Hair Longevity

"In the evolving landscape of hair care, longevity and the use of marine ingredients have emerged as prominent trends, reshaping how consumers approach hair health and sustainability," says Nina Esposito, marketing director, Provital USA. "Longevity in hair care now emphasizes products that enhance overall hair and scalp health as foundational to maintaining vibrant hair."

She adds, "People are increasingly seeking ways to maintain their hair's vitality and health for as long as possible. Beyond basic hair care, consumers are focusing on holistic and preventive measures to protect against environmental damage, stress and aging. With more sophisticated needs, they are willing to invest in products with proven results, emphasizing clinical testing and transparency. Popular ingredients include antioxidants, superfoods, and peptides, known for their protective and strengthening properties."

Esposito notes, "Sealrose, is an active ingredient that has immense potential to resonate with consumers, as it directly offers a solution that prioritizes hair health and addresses damage. This innovative product is obtained from the seedless pulp of

Courtesy of Chemyunion

the *Rosa canina* fruit, a well-known plant recognized as a superfood for its numerous benefits, in COSMOS-compliant oleic sunflower oil. This active ingredient combines nature and beauty to enhance the condition of healthy hair, improving its overall visual appearance."

She concludes, "Its reparative action effectively recovers a 72% of the lipid layer of the hair cuticle by increasing its hydrophobicity in just one application, thereby returning it to the lipidic levels of healthy hair. The effect of Sealrose persists even after rinse-off, with a 65% of recovery. Beyond its ability to restore the lipid layer, Sealrose also revitalizes sensory attributes, resulting in softer, hydrated, and more manageable hair. It can be incorporated into hair repair solutions to address damage to the hair cuticle caused by external factors."

Marine Ingredients on the Rise

"Marine ingredients have gained popularity for their nourishing and therapeutic benefits," says Provital's Esposito. "Seaweed and algae extracts, rich in minerals and antioxidants, hydrate and strengthen hair strands, promoting scalp health and combating inflammation. Marine collagen, known for its strengthening properties and ability to retain moisture, enhances elasticity and reduces breakage. Oils derived from marine plants offer lightweight hydration and nutrient replenishment, appealing to consumers seeking natural, effective hair care solutions. This growing interest in both longevity and marine ingredients underscores a broader trend towards more natural, sustainable, and health-conscious hair care solutions."

Esposito notes, "Densinaria is a hair volume and strengthening active ingredient derived from *Palmaria palmata*, a well-known, healthy seaweed, revered for centuries for its nutritional value, and proposed for the first time for hair care. The active ingredient, enhanced with arginine, 100% natural origin and COSMOS-approved, addresses hair fiber resistance and split ends prevention enabling to display a healthy and volumized mane for longer and with a well-perceived ingredient, in line with consumers concerns."

The technology offers "a restorative action from cortex to cuticle similar to keratin thanks to an increased quantity of reconstructive biomolecules such as proteins and peptides obtained using an enzyme-assisted extraction process which optimizes yield while minimizing environmental impact," says Esposito.

She adds, "The appearance of split ends is more than halved, hair's resistance to breakage more than triples and hair fiber diameter increases by 25%. It can be used in keratin-like hair solutions to strengthen hair fiber or when hair is weakened by hormonal and stress factors."

Hair Styling Defense

"With consumers eager to challenge the beauty industry, applications in hair care have witnessed an era where defying traditional norms is becoming the new reality, driving innovations that transcend mere aesthetics in hair care," says Henrique Marconi, global product marketing manager, Chemyunion. "To meet the diverse needs of modern consumers, functionality is paramount: heat tools integrated with quality products and inclusivity are crucial for facilitating bespoke hair design."

Marconi adds, "Issues such as frizz, dehydration, and breakage are common during hair styling, all attributed to excessive heat usage. This scenario intensifies the demand for advanced technologies that address these issues, promoting hair resilience and durability while reducing reliance on palliative solutions."

He continues, "According to Mintel, 92% of consumers use hair styling devices, despite 49% expressing concerns about the damage caused. Consequently, the pursuit and introduction of products aimed at proactively preventing such damage have grown exponentially, consistently aligned with sustainability principles."

Marconi notes, "At Chemyunion, we understand that style should not compromise hair health. Hence, we have developed an innovative active ingredient designed to protect and strengthen hair during the styling process. With an unwavering commitment to sustainability and superior outcomes, our solution ensures flawless styling without compromising hair health."

He continues, "Thermoshield N AV is a thermal protection active that retains water in the hair fiber and forms a protective film, increasing hair hydration by up to 17%. It operates through advanced technological mechanisms, shielding hair from thermal damage without compromising styling for up to 24 hours."

Marconi adds, "With over 99% natural content in its composition, Thermoshield N AV was meticulously designed to mitigate heat-induced damage, capable of reducing hair temperature exposure by up to 77°F (25°C)—surpassing certain silicone molecules. Furthermore, Thermoshield N AV has the ability to protect protein denaturation (ΔH) by up to 40% when exposed to heat. Thus, it is an efficient alternative for protecting hair strands against heat, considering the fiber structure and intelligent deposition, free from build-up effects."

He concludes, "Thermoshield N AV presents a comprehensive dossier of tests proving its high performance compared to silicone molecules during the thermal damage process, easing this (almost) daily process in the lives of many consumers." ■

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100% Pure Squalane from Lady Burd Cosmetics

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Nourish dry skin, relieve feelings of tightness and help reduce the fine lines caused by dehydration with this 100% pure squalane. This squalane can also be used in wet or dry hair to add moisture and shine.

Images courtesy of the manufacturers



FDA Colorants from Spectra Colors

Spectra Colors Corp

https://spectracolors.com/fdc-dyes/

Spectra Colors offers small quantity batch-certified colorants to be used in drop-in formulations. The company's FD&C and D&C dye products are available as powders, with specific colors available in liquid and granular form.



Amiaura Surface Treatment Kit

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"As we get older, there are biological changes that being to happen to our hair," says Michelle Chavez, vice president of innovation, Accupac/Cobalt Labs. "The scalp gets dehydrated faster, oil glands slow down sebum production and the skin has trouble holding on to moisture, leading to thinner, flatter skin on the scalp. Simultaneously, the length of the hair growth cycle gets shorter, and the follicle diameter gets smaller, resulting in hair thinning and loss."

Image by Kostiantyn at Adobe Stock

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Consumers' Top Hair Care Concerns Point to Brands' Next Innovation Opportunities

Emerging claims associated with hormonal shifts, aging, styling stressors and more point to growth ahead for hair health brands.



Hair wellness is everywhere, which has *Global Cosmetic Industry* asking: what's next? Diving into consumer hair care search data, emerging ingredients with new and updated claims and functions, and a survey of recent brand launches, we've surfaced a wide array of opportunities. This includes white space in well-established and highly competitive categories as well as emerging issues that are still seeking dominant players. In this report, we'll break down the most actionable trends and the innovation advancements and consumer sentiments driving them. Let's get started.

Solving Hair Loss & Thinning Due to Stress, Hormones and More

Hair loss is a perennial shopper concern. According to July 2024 data[a] from Spate, there are 1.3 million "hair growth" online queries each month in the United States alone. And a recent Cosmetify survey found[b] that top online hair searches include "how to grow hair faster" and "why is my hair falling out." At the same time, key causes of hair loss are increasingly being targeted by emerging ingredients and brands.

[a]www.spate.nyc
[b]www.cosmetify.com/us/the-hair-report

Tackling Stress-induced Hair Loss

For instance, Algaktiv recently launched the multifunctional Densidyl, which is designed to reduce stress-induced hair loss and recover hair color. The technology comprises xanthophyll and phycocyanin to block the cortisol receptors and repair oxidative damage. In effect, the ingredient reportedly fortifies hair follicles and encourages robust growth. Densidyl is recommended for use in supporting hair growth and density claims in conditioning and cleansing hair care products.

Ingestible Hair Loss Solutions

On the ingestible front, Hum Nutrition's new iteration of its Hair Strong Gummy, the Hair Strong Capsule ($26), takes on consumers' pill fatigue by offering a single-capsule solution for hair loss.

"Consumers were telling us that the leading hair growth solutions that are drug free require too many pills per day," says founder and CEO Walter Faulstroh. "Four to be precise."

He adds, "We wanted to change that by offering a groundbreaking one capsule per day formula that has been proven in a double blind placebo controlled study to improve hair growth and fullness. Results come fast and best of all at 1/3 of the price."

The Hair Strong Capsule's ingredients include botin for hair, skin and nail health; folic acid to

encourage keratin production; B12 for red blood cell creation and oxygen distribution to hair follicles for growth stimulation; zinc for follicle health and reduced shedding; fo-ti (*Polygonum multiflorum*) to support hair growth and color; and PABA for hair fall prevention and encouragement of healthy growth.

Ingestible hair care supplements have immense potential, says Jason Harcup, chief R&D officer for Unilever's Beauty and Well-being division: "Nutrafol, one of our recent acquisitions that sits within our Health & Well-being business, pioneered the hair wellness category in the U.S. [market] and is built on a rigorous science-backed approach to hair health. The brand offers a large portfolio of clinically tested hair growth supplements for women, postpartum women, menopausal women, men and vegan women. It's the number one dermatologist-recommended hair growth supplement brand in the U.S. [market]."

Harcup notes, "What sets Nutrafol apart is their focus on science, technology and evidence generation. They prioritize putting their hair health innovations to the test and have a robust set of clinical studies to support their brand promise of supporting people on their hair health journey and improve hair growth with three to six months of use."



Hum argues comparable products require as many as four daily pills, creating a challenge in encouraging shopper follow-through.

The brand isn't stopping at supplements, however. Harcup explains, "In addition to ingestibles, Nutrafol promotes the holistic integration of topical products to enhance overall effectiveness. While topical products have long been the go-to for addressing hair health externally, there's a growing recognition of the importance of nourishing hair from within."



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Hormonal Hair Loss: an Emerging Target

"Growth, fullness and strength are key concerns for our consumers," says Hum's Faulstroh. "Oftentimes consumers enter the category when postpartum, perimenopausal or overall when their hair needs extra attention due to excessive exposure or stressors such as heat, chemicals and extensions."

Recent Spate data backs up Faulstroh's observations about postpartum and perimenopausal concerns; per the firm, "hormonal hair loss" is one of the fastest-growing consumer hair searches online. Related searches include "how to stop hormonal hair loss," "can hormonal hair loss be reversed" and "what treatments are available?"

"As we get older, there are biological changes that begin to happen to our hair," says Michelle Chavez, vice president of innovation, Accupac/Cobalt Labs. "The scalp gets dehydrated faster,

From top: courtesy of Hum; Nutrafol

oil glands slow down sebum production and the skin has trouble holding on to moisture, leading to thinner, flatter skin on the scalp. Simultaneously, the length of the hair growth cycle gets shorter, and the follicle diameter gets smaller, resulting in hair thinning and loss."

Chavez adds, "Much of this is worsened by the hormonal changes during perimenopause, typically between the ages of 45-55, which can have severe effects to the scalp including a dramatic decline in collagen production."

A June 2024 Euromonitor report[c] backs up these observations: "The past decade has seen a push among female consumers to better understand how hormonal changes during life stages impact their skin and hair. The industry is in an exploratory stage to identify scientifically proven claims that address need states by life stages, and to invest in consumer education regarding functional benefits for women."

Boosting Hair Volume & Strength

On the ingredient front, Provital's Densinaria, derived from *Palmaria palmata* seaweed, addresses hair volume and strength concerns in a single technology.

"Densinaria … is an active ingredient enhanced with arginine, 100% natural in origin and COSMOS-approved, that addresses hair fiber resistance and split ends prevention, enabling ... a healthy and volumized mane for longer," says Nina Esposito, area sales and marketing director, Provital.

The technology, rich in reconstructing biomolecules such as proteins and peptides, reportedly restores the hair from the cortex to the cuticle via functionality that is similar to keratin.

Per Esposito, "The appearance of split ends is more than halved, hair's resistance to breakage more than triples and hair fiber diameter increases by 25% [when Densinaria is applied]. It can be used in keratin-like hair solutions to strengthen the hair fiber or when hair is weakened by hormonal and stress factors."

New Hair Care Ingredients Are Doing Damage Control

From heat and chemical exposure to mechanical stressors, hair damage is incredibly common. Repairing that damage is a leading claim associated with emerging brands and ingredients.



Recently, upstart hair wellness brand Lobie highlighted its Lobie Peptide, which comprises 123 amino acids to support polypeptide chains and disulfide bonds damaged by bleaching, coloring, chemical treatments and heat styling.

Recently, upstart hair wellness brand Lobie highlighted its Lobie Peptide, which comprises 123 amino acids to support polypeptide chains and disulfide bonds damaged by bleaching, coloring, chemical treatments and heat styling.

When interacting with the keratin structure of the hair, the Lobie Peptide is claimed to reconnect damaged sites at the molecular level.

"Biotech ingredients enable us to create highly effective formulations that target specific hair care needs," says Lobie founder and CEO Anastasia MacKay. "For example, we can develop peptides and proteins that precisely address issues like damage repair, moisture retention and frizz reduction. This scientific precision ensures that our products deliver real, noticeable results."

Reducing Hair Damage: New Technologies

Among recent damage-focused hair care ingredients is Sharon Personal Care's 100% natural Sharofeel DS

[c]www.euromonitor.com/top-trends-shaping-the-beauty-and-personal-care-industry/report



Per Spate, "hormonal hair loss" is one of the fastest-growing consumer hair searches online. Related searches include "how to stop hormonal hair loss," "can hormonal hair loss be reversed" and "what treatments are available?"

From top: courtesy of Lobie; image by New Africa at Adobe Stock

(INCI: dioctyldodecyl succinate) emollient, which reportedly delivers skin- and hair-enhancing benefits in beauty formulations. In hair care, Sharofeel DS has significant thermal stability for heat protection in hair styling and other hair care applications.

Meanwhile, Provital's new rosehip-inspired multifunctional Sealrose (INCI: *Helianthus annuus* (sunflower) seed oil (and) *Rosa canina* fruit extract (and) tocopherol) can reportedly reduce hair damage by 72% after just one application by boosting hydrophobicity.

Sealrose remains after rinse-off, with a 65% recovery, per the company. In addition, combability is boosted by 33% and softness by 17%. The result is softer and more hydrated and manageable hair.

The technology is reportedly appropriate for formulations designed to repair hair cuticle damage.

Sealrose is halal certified, vegan, COSMOS-approved and China-compliant. Its rosehip content is ethically sourced from the company's partner, Serra la Vall.

"The lipid layer plays a pivotal role in ensuring optimal hair wellness through multiple mechanisms," explains Provital's Esposito. "Firstly, it acts as a natural barrier that helps to retain moisture within the hair shaft, thereby preventing dryness and brittleness. This moisture retention not only keeps the hair hydrated but also enhances its elasticity and flexibility, reducing the likelihood of breakage and split ends."

She continues, "Additionally, the lipid layer contributes to the smoothness and shine of hair by forming a protective coating that reflects light, resulting in a healthier and more vibrant appearance. Moreover, this protective barrier shields the hair from external aggressors such as UV radiation, pollutants and chemical treatments, which can otherwise cause damage and weaken the hair structure."

Esposito concludes, "By maintaining the integrity of the lipid layer, hair becomes more resilient to environmental stressors and easier to manage, ultimately supporting overall hair health and longevity. Therefore, focusing on maintaining or restoring the lipid balance in hair care products is essential for promoting optimal hair condition and enhancing its natural beauty."



Sealrose remains after rinse-off, with a 65% recovery, per the company.

Boosting Hair Resilience

Sharon Personal Care's SharoHyal Moringa hair restoration technology comprises medium molecular weight hyaluronic acid and hydrolyzed moringa micro-proteins that reportedly boost hair elasticity and resilience by 6% after seven treatments and moisturization by 45% after one treatment (per clinical tests).

The ingredient, which purportedly has a more pleasant odor profile compared to other common proteins, takes inspiration from the skinification of hair care.

Per Sharon Personal Care, the chemical bonds created between the negative charges of SharoHyal Moringa's hyaluronic acid content and the positive charges of the hydrolyzed proteins within this vegetal protein help form a protective layer on the cuticle. This layer rebuilds damaged hair strands.

"With SharoHyal Moringa you can create a superior formulation," says Robert Donadelli, R&D manager at Sharon Personal Care. "It is natural, water-soluble, and it offers improved color and odor when compared to common proteins, making it highly appealing for clean beauty. This protein is sustainably sourced, produced through an eco-conscious extraction process, and it is biodegradable. By incorporating SharoHyal Moringa, companies can demonstrate their commitment to sustainable hair care benefits and innovation."

A Conditioning Polymer for More Resilient Hair

Elsewhere, Syensqo's Naternal Care Clear SGI (guar hydroxypropyltrimonium chloride) is reportedly the first readily biodegradable, non-ecotoxic and ethically sourced conditioning polymer for hair experiencing low to medium damage. The ingredient is applicable in ultra-clear formulas and offers conditioning with no build-up, per Syensqo, allowing it to perform well

Image by Pixel-Shot at Adobe Stock

in both wet and dry stages. Notably, Naternal Care Clear SGI can be used to replace polyquaterniums in formulations designed for even fine and baby hair.

Hair Styling Defense

Damage prevention has also been a critical focus, especially in the context of styling.

"There has been a continuous trend toward style and self-expression, particularly post-pandemic," says Unilever's Harcup. "We are seeing a trend toward at-home styling, partially driven by advancements in hot tools that deliver at home. This can bring damage and so consumers are ensuring they can protect their hair health while expressing themselves authentically."

Harcup notes, "Unilever brands are pioneers in this space. TRESemmé, the number 1 styling brand in the United States, offers a product with an impressive protection up to 450°F, and is the No.1 selling heat protecting spray in the U.S. [market]."

He concludes, "We also have multi-benefit products that help during the styling process with anti-frizz, smooth, shine and heat protect all in one. Our latest launch, the Nexxus Prep & Protect Heat Protect Spray, offers 72 hours humidity shield and 48 hours frizz control and contains our StyleProtect Technology to help consumers achieve salon-quality looks while prioritizing their hair health."

Styling defense is the focus of Ashland's N-Durhance ES-Repair ingredient (INCI: hydroxypropyl guar hydroxypropyltrimonium chloride (and) guar hydroxypropyltrimonium chloride). The split end repair polymer reportedly protects hair from damage and breakage during wet combing and heat styling. It also provides a lubricated, non- tacky feel when wet and feels well-conditioned when dry, per the company.

HairMimics Boost (ceramide NG (and) cholesterol (and) palmitic acid (and) *Macadamia integrifolia* seed oil (and) *Ricinus communis* (castor) seed oil (and) *Olea europaea* (olive) fruit oil) from Evonik, meanwhile, protects the hair from damage induced by UV exposure, grooming and linear aging.

In hair care formulations, the technology reportedly replenishes lost essential lipids to prevent brittleness and resulting damage. The oil-based ceramide ingredient mimics the essential lipids in hair to enhance mechanical resistance and improve the appearance of damaged hair tips.



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Image by Ljupco Smokovski at Adobe Stock

Textured Hair Remains Underserved

Beauty ingredient suppliers and brands have long spoken about the needs of consumers with textured hair. Yet, search data shows many shoppers have yet to find the ideal solution. Per July 2024 Spate data, there are 5.5 million online curly hair searches in the U.S. market every month.

These concerns are central to Unilever's polycultural hair innovation agenda.

Unilever's Harcup notes, "There are 1.5 billion consumers with melanin rich skin and textured hair globally, yet we know they have unmet needs in the beauty and wellness space. In the United States, Unilever's Polycultural Centre of Excellence was set up to design products that are made specifically for those with melanin-rich skin and textured hair who have been historically underserved in the beauty industry. The Centre is designed to deliver a more diverse and inclusive consumer product experience by advancing science, consumer and biological understanding, whilst also tapping into industry partnerships."

He adds, "We're also working to fill gaps in knowledge about polycultural consumers (across the industry, just 5% of trials include people from African American and Hispanic backgrounds) and we are committed to increasing our partnerships with diverse experts and suppliers, specifically Black- and Brown-owned suppliers and manufacturers."

"An estimated 65% of the US population have curly, coily or wavy hair, according to a 2018 Texture Trends Report from Texture Media," say Andrew Miller, senior marketing manager, hair, body and oral care, North America, Gina Koustoubardis, technical service specialist, personal care North America, and Mythili

Nori, senior scientist, performance and claims, personal care North America, BASF. "With a growing focus on inclusivity and diversity, there has been a surge in demand for hair care products and services that cater specifically to textured hair types. This shift in consumer behavior has led to a flourishing industry that celebrates and embraces the unique needs and beauty of textured hair."

The BASF team adds, "One of the key factors driving the growth of textured hair care in North America is the increasing awareness and acceptance of natural hair. Many individuals, particularly those with curly, coily or tightly coiled hair, have chosen to embrace their natural hair texture instead of chemically straightening or altering it. This has created a demand for products that enhance and maintain the health and vitality of textured hair."

This has led to a launch of products such as shampoos, conditioners, styling gels and treatments featuring ingredients such as shea butter, coconut oil and argan oil.

"However," the BASF group notes, "despite the progress, challenges remain in the textured hair care industry. There is still a significant gap in the market for products that cater to protective hairstyles. This presents an opportunity for growth in the market as there is high consumer demand and buy in for protective hairstyle products."

Key opportunities include a focus on hair health, styling products for textured hair, dry and itchy scalp care, and solutions for protective styles. Top concerns in need of solving include dryness (an opportunity for masks), breakage and detangling, per the BASF group.

On the styling front, the BASF team has some insights: "Throughout the process of washing, conditioning and styling curly and coily hair, there are various phases of transformation. When wet and freshly styled, curls tend to naturally stretch and hang lower. However, as they gradually dry, their pattern tightens, causing each curl to spring up and coil. This phenomenon, often referred to as 'shrinkage,' is the reason why curly hair can sometimes appear shorter than its actual length."



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Among the BASF ingredient solutions designed to meet the needs of textured haired consumers are:

- PeptAIde 4.0, comprising four multifunctional peptides, derived from organic rice proteins. The technology reportedly has a soothing effect on sensitive scalps, thereby reducing scalp scales and redness. In addition, it helps to normalize scalp pH. Furthermore, it supports hair follicle vitality by protecting against hair collagen degradation. The result is greater hair volume.
- Rambuvital, an extract of rambutan seeds that reportedly helps vitalize and protect the scalp and hair follicles against pollution, while minimizing malodor and energizing the hair bulb. The technology is ideal for protective styles, delivering moisture and freshness.
- Cetiol Softfeel and Cetiol C5, emollients that act as alternatives to petrolatum and silicones and which work together to provide hydration to the hair and scalp, leaving it feeling silky smooth and soft to the touch.
- Cegesoft PS 6 and Cegesoft SB 45 TR, emollients that work to hydrate and enhance the texture of curly and coily hair for improved smoothness and manageability, per BASF.
- Verdessence Alginate and Verdessence Xanthan, biopolymers that act as both rheology modifiers/product texture enhancers and natural styling polymers to

Image by (JLco) Julia Amaral at Adobe Stock

create serums with light, gel-like consistencies. They also provide long-lasting styling benefits like frizz management.

New Frontiers in Scalp Wellness

In Q1 2024, Circana reported that skin-care-inspired hair care products such as oils, serums and scalp care all grew between 13% and 25% in the U.S. market[d].

The Interconnectedness of Scalp & Hair Health

The trend in scalp care intersects with concerns surrounding hormonal changes during different life stages, textured hair and hair loss/fall (as discussed previously in this report).

"Scalp health is a top need for both female and male [concerns]," says Unilever's Harcup. "We know that the prime cause of abnormal hair loss must be dysfunction of the hair growth life cycle within the follicle. Clear, a leader in scalp care, recently introduced its Anti Hair Fall range to target the hair growth cycle."

Harcup notes, "These products promote follicle vitality via increasing follicle cell turnover and improving hair anchorage. In multiple studies, the Clear Anti Hair Fall range can reduce hair loss and improve hair density within four weeks. In consumer tests, 90% perceived a significant reduction in hair loss within two weeks."

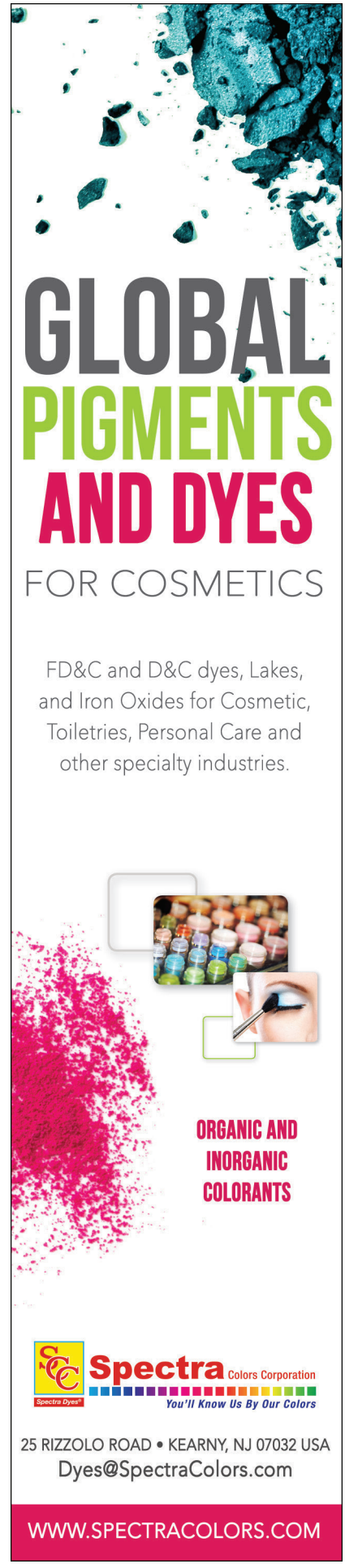
This is just the beginning, Harcup says: "Skin care has benefitted so much from scientific advances in recent years, so clearly a huge new playground has opened up from that for hair, starting with the scalp. The rise of 'skinified' hair care routines reflect a market shift toward maintaining and enhancing hair vitality with the same scientific rigor and holistic approach as skin care. What's more, in our era of unlimited access to information, consumers are

[d]www.circana.com/intelligence/category/blog/



"Dove's Scalp + Hair Therapy collection is a new premium range of products in the U.S. [market] co-created with dermatologists that nourish and strengthen hair from root to tip," explains Harcup. "The new range uses ingredients more commonly seen in skin care, such as niacinamide, peptides and zinc, to enhance scalp health and promote fuller, stronger hair."

Courtesy of Dove/Unilever



so much more educated on the latest in science, efficacious ingredients and formats, and this is driving their eagerness to use these new approaches."

These innovations are already hitting the market.

"Dove's Scalp + Hair Therapy collection is a new premium range of products in the U.S. [market], co-created with dermatologists, that nourish and strengthen hair from root to tip," says Harcup. "The new range uses ingredients more commonly seen in skin care, such as niacinamide, peptides and zinc, to enhance scalp health and promote fuller, stronger hair."

Multi-benefit Scalp Care

"Scalp care is incredibly important as we age because it is directly linked to the health of the hair follicles, and we know that the skin on the scalp ages faster than the skin on the face and body," says Cobalt Labs' Chavez. "Scalp care products should provide nutrition, support circulation, provide hydration, strengthen the barrier and keep the microbiome in balance."

She adds, "At Cobalt Labs, we are predicting a rise in multi-benefit styling treatments that also provide scalp skin care. Our Root Lifting, Energizing and Volumizing Spray is a plumping treatment that builds fullness, body and texture by fortifying roots and densifying hair while also caring for the skin on the scalp. This refreshing scalp spray stimulates and strengthens follicles without weighing down hair. The non-greasy formula helps support a healthy environment for hair to grow while providing soft-touch, long lasting volume."

Scalp Care Ingredients

On the ingredient front, Provital's Kerascalp offers solutions particularly for older consumers.

"Kerascalp … effectively mitigates hair thinning and loss by promoting hair thickness and preventing follicle miniaturization and weakening," says Provital's Esposito, "while preserving the stem cell niche for follicle strength and improving hair anchorage to the scalp. To combat slow hair growth associated with aging, Kerascalp stimulates and supports the hair growth cycle, enhancing volume and density for a fuller appearance."



"Kerascalp … effectively mitigates hair thinning and loss by promoting hair thickness and preventing follicle miniaturization and weakening," says Provital's Esposito, "while preserving the stem cell niche for follicle strength and improving hair anchorage to the scalp. To combat slow hair growth associated with aging, Kerascalp stimulates and supports the hair growth cycle, enhancing volume and density for a fuller appearance."

She continues, "Dryness of the scalp and hair is alleviated through Kerascalp's rebalancing properties, which restore moisture to brittle hair and reduce flakiness. Additionally, Kerascalp helps delay the onset of gray hair by preserving pigmentation functions, reducing and preventing premature graying. By addressing these key issues, Kerascalp enhances the overall health and appearance of hair and scalp for older consumers."

Esposito explains why collagen XVII is so critical to hair wellness.

"Collagen XVII is a key protein essential for maintaining strong and healthy hair follicles," she says. "It forms structures called hemidesmosomes that anchor the outer skin layer (epidermis) to the deeper layers (dermis), providing crucial stability to hair follicles. Beyond structural support, collagen XVII plays a pivotal role in regulating the hair growth cycle, ensuring proper transitions between growth phases, and supporting continuous hair regeneration. It also contributes to maintaining the stem cell niche within hair follicles, crucial for the production of new hair cells."

Esposito adds, "Collagen XVII is not only important for the structural integrity and regeneration of hair follicles but also plays a significant role in the pigmentation of hair. Collagen XVII supports hair pigmentation by maintaining the environment necessary for melanocyte function, ensuring effective melanin transfer, preserving the melanocyte stem cell niche and protecting against aging-related damage. These roles are crucial for maintaining healthy, pigmented hair and preventing premature graying."

Finally, says Esposito, "Kerascalp is prominently featured across scalp and hair care for its diverse benefits. It's celebrated for promoting a youthful appearance, serving as an

Image by Pixel-Shot at Adobe Stock

all-in-one hair care solution, and combating hair loss and premature graying. With its ability to enhance hair shine, vitality, and strength, Kerascalp is truly versatile. It finds application in scalp treatments, beauty and anti-stress regimens, well-aging and preventative care, all while being vegan and 100% natural from the amla fruit. From leave-on serums to hair masks and mists, Kerascalp is considered indispensable in leave-on hair care products."

Scalp Care for Textured Hair

Elsewhere, Croda Beauty Actives has unveiled new tests highlighting Apiscalp's scalp hydrating and flaking reduction effects on individuals with textured hair. The multifunctional active comprises a natural extract of *Apium graveolens* (celery) seeds obtained via a supercritical CO_2 extraction process.

It complies with Chinese cosmetics regulations and is COSMOS-approved. Apiscalp reportedly addresses:

- oily and dry scalps to combat dandruff, itching, dryness and hyperseborrhea;
- local microflora (*Malassezia*) proliferation associated with itchy and flaking scalps;
- the restoration of the scalp stratum corneum integrity for an improved skin barrier;
- and regulation of epidermal differentiation and desquamation.

Per the latest research, Apiscalp reduces scalp itching by 80% among those test subjects with textured hair. It also improves scalp hydration by 43% after 3 weeks' application.

Study volunteers reported an improvement in the flaking state of their scalp in as little as one application, per Croda Beauty Actives, with an average reduction of 19%. After 3 weeks, this reduction grew to 63%, regardless of gender or hair type.

"More in vivo and in vitro studies, available on demand, have been conducted to demonstrate its various benefits on scalp beauty and wellness," per the company.

Promoting Hair Growth from the Scalp Up

Sabinsa's Proscalpin is a solvent-free blend comprising Cococin (*Cocos nucifera* (coconut) liquid endosperm), Saberry (*Emblica officinalis* fruit extract) and PeptiSeLect (γ-L-glutamyl-L-selenomethionine (GGLSM)) that promotes hair growth by enhancing the proliferation of human follicle dermal papilla cells (HFDPC) and protecting against UV stress.

Preserving the Scalp Microbiome

Lubrizol Life Science Beauty has released tests for Fensebiome peptide (INCI: water (aqua) (and) acetyl heptapeptide-4 (and) caprylyl glycol) applied to the scalp.

The data reportedly showed an increase in beneficial scalp microbiota that tends to decrease with age and a modulation of age-induced microbiota changes associated with a rejuvenated and healthier scalp.

The ingredient was also tested on two panels of volunteers: a group of women with sensitive scalps and a group of men with bald sensitive scalps. Both groups found that the ingredient soothed the scalp, leaving it feeling hydrated and with less itchiness and desquamation, per the company.

In vitro tests also showed a reduction of kallicrein-5 and PAR-2 activation, which helps relieve inflammatory and itching skin and scalp conditions.

Previously, the ingredient was shown to have effects on the skin by reinforcing the double cutaneous barrier, promoting microbiota balance and enhancing the physical barrier, helping to achieve a healthier and younger appearance, per the company.

The heptapeptide can now be incorporated into scalp formulations designed to reduce sensitivity, prevent dehydration and rejuvenate the scalp as well as form part of skin care products aiming to strengthen the double cutaneous barrier, per the company.

Emerging Hair Care Ingredients Target Category Concerns

Croda's Crodamol GTS (INCI: C10-14 alkyl polypropanediol-3 myristate) vegetable-derived emollient reportedly imparts significant smoothness and shine across multiple hair types.

The ingredient technology is intended for shampoos, rinse-off and leave-in conditioners, treatments, hair styling, hair color, skin care, body care and color cosmetics.

This technology boasts an eco-friendly profile, offering biodegradability and low aqua toxicity, while also being vegan suitable and 100% natural.

At Suppliers' Day 2024, Croda featured the technology in an anti-humidity mango and avocado hair-finishing butter.

The formulation was designed to offer nourishment and styling in a single product.

'Clean' Hair Wellness Ingredients

While efficacy is at the forefront of today's beauty world, eclipsing vague "clean" claims, there is still strong demand for alternatives to conventional chemistries. For instance, Syensqo recently launched Dermalcare Avolia MB (isoamyl laurate, *Persea gratissima* oil), a replacement for non-volatile silicone oils in hair care. The technology is said to be a sensory booster with strong performance in wet and dry combing.

Meanwhile, Croda's Crodamol GTS (INCI: C10-14 alkyl polypropanediol-3 myristate) is a vegetable-derived emollient that reportedly imparts significant smoothness and shine across multiple hair types. The ingredient technology is intended for shampoos, rinse-off and leave-in conditioners, treatments, hair styling, hair color, skin care, body care and color cosmetics. This technology boasts an eco-friendly profile, offering biodegradability and low aqua toxicity, while also being vegan-suitable and 100% natural. ■

BEAUTY'S MULTIFUNCTIONAL MOMENT:

LESS IS SO MUCH MORE

Multifunctional technologies have the capacity to simplify formulations while enhancing performance across a wide range of functions and claims.



Formulations are becoming simpler, driven by a desire for fewer ingredients, as well as the introduction of many multifunctional materials.

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A recent analysis from Kline's Elodie Alves points out that multifunctionality in beauty isn't just a consumer-facing concept[a]. Yes, hybrid makeup-skin care products are on the rise, as are whole-body deodorants and combined hair/scalp products. But multifunctionality is also having an immense—and growing—impact on INCI lists. Multifunctional beauty ingredients can of course shorten those lists, which consumers love. They also support clean beauty principles that put a premium on cutting out excess materials—and can make formulations easier and cheaper to assemble and process. But how big of an impact is this movement having and which technologies offer opportunities for brands to take a less-is-more approach to innovation?

Beauty Formulations Are Getting Simpler

The numbers don't lie. A 2023 EWG[b] x Morning Consult report noted that, "the average adult uses 12 personal care products a day," leading to exposures from as many as "112 unique chemical ingredients."

To compare, a similar 2004 report found that adults on average used nine products daily, potentially exposing them to 126 individual ingredients.

The takeaway: formulations are becoming simpler, driven by a desire for fewer ingredients, as well as the introduction of multifunctional materials.

The Kline report explains, "This trend has led to growth in market demand for personal care products that provide various benefits, such as hydration, anti-oxidation, sun protection, etc. This trend is reflected across multiple ingredients. For example, among humectants, lactic acid benefits from its preservative properties, while glycolic acid offers excellent antioxidant properties. Both ingredients also have great exfoliation properties."

That's just the tip of the iceberg. Per the report, the multifunctional beauty ingredient boom has boosted the popularity of moisturizing, conditioning and skin barrier-supporting emulsifiers; preservative boosters with moisturizing benefits; rheology modifiers that can moisturize or provide anti-inflammatory activity; and more.

[a]https://klinegroup.com/why-is-multi-functionality-demand-rising-in-the-personal-care-industry/

[b]www.ewg.org/research/survey-finds-use-personal-care-products-2004-what-means-your-health



The multifunctional beauty ingredient boom has boosted the popularity of moisturizing, conditioning and skin barrier-supporting emulsifiers; preservative boosters with moisturizing benefits; rheology modifiers that can moisturize or provide anti-inflammatory activity; and more.

New Multifunctional Beauty Ingredients

This year has already witnessed a wide array of multifunctional ingredient launches.

Preservation & Multifunctionality

For instance, Sharon Personal Care's AquaVita line comprises a vitamin-based multifunctional preservation platform.

The range is based on niacinamide (vitamin B3), enhanced to turn into a mild, green, safe and sustainable antimicrobial preservation solution, per the company. The result is a preservation platform that protects formulations and contributes to skin health.

AquaVita offers enhanced hydrophilicity, which boosts its effectiveness against microorganisms. Rather than solely impacting microorganisms' outer layer, it disrupts their reproductive process, making it more effective at preventing their growth.

The platform is dermatologically tested for sensitive skin, is microbiome friendly and shows excellent antioxidant properties, per the company.

Currently, two ingredients have joined the line, including: Sharon AquaVita 90 (INCI: niacinamide, glyceryl caprylate, decylene glycol) and Sharon AquaVita 95 (INCI: niacinamide, polylysine).

Naama Eylon, CEO of Sharon Personal Care, says, "AquaVita goes beyond preservation and is truly multifunctional. It combines antimicrobial efficacy and clinically proven skin care benefits, such as reduced pigmentation, skin brightening and skin barrier strengthening."

Elsewhere, Ashland's Phyteq Raspberry Multifunctional is a preservative booster that acts as an antioxidant and free radical scavenger, defending the elasticity of the skin.

Dual-action Pro-aging

BASF's Hydrasensyl Glucan Green is designed to merge the benefits of hyaluronic acid and collagen in skin and sun care. This beta-glucan is reportedly capable of binding to large amounts of water in the skin, while its polysaccharide chains form a rope-like triple-helix similar to collagen. In formulations, Hydrasensyl Glucan Green offers skin smoothing and hydrating properties to soothe erythema. Key claims supported by the ingredient include a reduction in redness, resurfacing action, hydration and skin comfort.



Naama Eylon, CEO of Sharon Personal Care, says, "AquaVita goes beyond preservation and is truly multifunctional. It combines antimicrobial efficacy and clinically proven skin care benefits, such as reduced pigmentation, skin brightening and skin barrier strengthening."

A Soft-focus Emulsion Booster

Ingredion's Farmal AF 1100 is an aluminum-free biodegradable polymer that can boost formulation viscosity while stabilizing emulsions. These benefits can improve product spreadability and coverage, per the supplier, while boosting pigment dispersion and offering a dry-to-the-touch sensory experience. At the same time, Farmal AF 1100's light-scattering capabilities deliver a soft-focus, mattifying effect on-skin. The technology is reportedly applicable in sunscreens, deodorants, lotions, dry shampoo, color cosmetics and aerosolized products.

As this handful of examples shows, multifunctional technologies have the capacity to simplify formulations while enhancing performance across a wide range of functions and claims. ■

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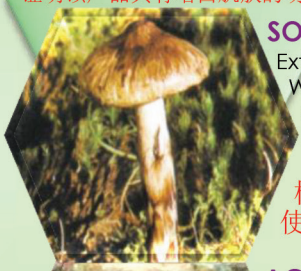
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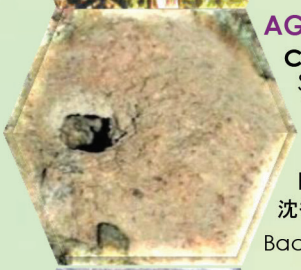
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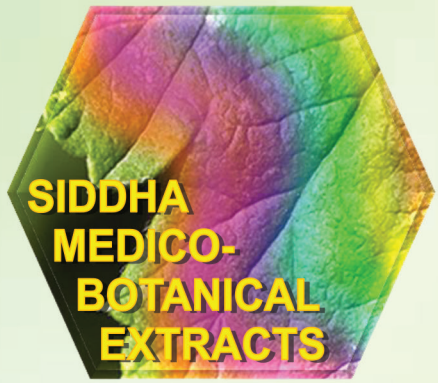
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Dark Ultra Brilliant Yellow 深黄 Yellow Light 浅黄
Dark Black 黑

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

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Dark Black 黑

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FUTURE-FORWARD SUSTAINABLE BEAUTY INGREDIENTS: WHAT'S NEXT?

New innovation is merging performance and eco-friendly credentials to generate consumer-winning claims across categories.

Sustainability is irrelevant if ingredients don't truly offer differentiating performance. This has been as true for conventional natural ingredients as well as today's emerging biotech ingredients. According to a May 2024 Exploding Topics Report[a], "Search volume for 'sustainable beauty' is up more than 200% since 2019." At the same time, clinical beauty has begun to eclipse pure-play "clean" beauty. How do we reconcile these trends? With safe, sustainable and high-functioning ingredients that offer the best of both worlds: performance and eco-friendly credentials. Here, we break down some of the leading companies and technologies leading this revolution.

Sustainable High-performance Beauty Ingredients Are the Future

"Performance is at the forefront of all that we do at Debut," says the company's founder and CEO, Joshua Britton. "We create novel active ingredients that are finely targeted and optimized for specific skin receptors and activation pathways that boast superior, scientifically validated claims. It would be incredibly difficult, not to mention highly unsustainable, to make these kinds of ingredients with [conventional] chemistry, and impossible with cultivation."

California-based Debut is already developing more than a dozen bioidentical biobased ingredients to replace conventionally produced/sourced materials in L'Oréal products across skin, hair, color cosmetics and fragrance.

In addition to solving the sustainability advantage, biotech materials can often provide heightened performance.

"With biotechnology, we work at the molecular level of the skin," Britton explains. "In our labs at Debut, we collect 30,000 gene expression data points per skin sample, studying every single gene pathway and protein to see how they are affected by novel ingredients."

He adds, "Advances in skin biology mean we can activate certain pathways in the skin, find new pathways and alter their course. That's where biotech and science are truly making a difference in beauty innovation: by creating future-forward active ingredients, not just the same-old ingredients."



"Performance is at the forefront of all that we do at Debut," says the company's founder and CEO, Joshua Britton. "We create novel active ingredients that are finely targeted and optimized for specific skin receptors and activation pathways that boast superior, scientifically validated claims."

Courtesy of Debut

[a]https://explodingtopics.com/blog/beauty-trends



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High Performance at Low Concentrations

These novel materials can solve consumer concerns, including sensitive skin, at lower doses.

"Consumers have long believed that more is better, that higher concentrations of active ingredients yield more powerful results," Britton explains.

He continues, "Biotech dosages are more aligned with pharmaceutical standards than cosmetic standards. Take ibuprofen, for example. Too much ibuprofen is very, very bad for you, but very targeted, defined and scientifically proven amounts are very helpful. Likewise, in biotech, we optimize the dosage to keep it as low as possible, so you're getting all the active ingredient benefits without unnecessarily exposing yourself to more activity."

Furthermore, he says, "You'll never have to build up tolerance to biotech ingredients, unlike the retinols of this world. Naringenin, the hero ingredient in our skin care brand Deinde, is a much higher-performing anti-inflammatory ingredient than niacinamide."

Britton adds, "A lot of brands use niacinamide at 5%, which can lead to sensitization, whereas we are able to use naringenin at 0.45% to elicit a clinically observed response. You're getting superior benefits with a lot less exposure to the potential harshness of the active."

This low-dose approach proposed by Britton is striking.

"Debut has a plethora of ingredients coming to products that allow clinical results at <0.3% loading compared to, let's say, 20% vitamin C or 2% kojic acid," he explains.

The Personalization Bonus

The rise of efficacy-focused consumers and brands has paralleled greater opportunities for personalized beauty, which often promises more tailored care and, presumably, improved results.

"True personalization can only be achieved when you have a scientific understanding of an individual's skin type," says Britton. "[W]hen we screen for new molecules, we test across a huge range of skin types and geographies because each individual skin type commands a specific pathway activation. We innovate our proprietary molecules using these results and findings."

In addition to precisely targeting individuals' specific pathways and receptors based on skin type, emerging ingredients can address other personalization factors.

Britton explains, "[W]ith improved scientific understanding of geographical stressors at specific locations, we are starting to explore geographical personalization, not just skin personalization."

Here, we survey an array of other sustainable ingredients delivering on sustainability and functionality in beauty.

High-functioning Sustainable Beauty Ingredients

Award-winning Microplastic Alternative

MicBeads100 from Bioweg recently took the Industrial Prize at the 9th edition of the Cosmetic Victories competition, presented by The Cosmetic Valley-ESSEC endowment fund. The innovation comprises a bacterial cellulose-derived functional micropowder that can replace solid microplastics such as PMMA in cosmetics and personal care products.

The ingredient is produced by upcycling agricultural and food waste in a zero-waste fermentation system. Once the



Of 100% natural origin ISO 16128 and vegan suitable, Silybidiol is derived from milk thistle fruit using green fractionation.



"Naringenin, the hero ingredient in our skin care brand Deinde, is a much higher-performing anti-inflammatory ingredient than niacinamide," Britton claims.

L to R: courtesy of Givaudan; Deinde



Carbopol Fusion S-20 polymer has a smooth flow that provides a light, soft sensory experience on the skin.

resulting bacterial cellulose is produced, the company modifies its surface using green chemistry to functionalize the cellulose fibrils and tailor them for various formulation designs.

The final MicBeads 100 ingredient can fully degrade within 60 days, complying with new EU regulations on microplastics, per Bioweg.

In formulations, the technology can act as a sustainable functional alternative to fossil fuel-based polymers like microplastic beads and liquid acrylic polymers. It can offer benefits such as the delivery of active ingredients, mattifying effects, film forming, rheology modification, exfoliation and more.

A Biodegradable Floral Booster

IFF's new Ylanganate fragrance molecule features solar white floral notes that pack a punch even in low doses.

In formulations, the ingredient boosts delicate floral scents with its "gentle complexity and calm sensuality," per IFF, which can enhance fruity, sweet and vanillic-balsamic notes.

The technology also lends a naturality to even synthetic fragrance formulas in finished perfumes and personal care, as well as home and fabric care.

Ylanganate is readily biodegradable, presents no discoloration issues and can be applied at dosage levels below 0.5%.

"The new Ylanganate molecule is a multifaceted ingredient with many sides to discover," said Ricardo Moya, senior perfumer at IFF. "Alongside primary white floral and citrus notes, its red and stone fruits, wintergreen, balsams and spices notes contribute to a more authentic foundation across all scent categories. It excels in many point-of-purchase scenarios, performing extremely well in home and fabric care applications with outstanding fragrance intensity (bloom effect) on damp fabric and lasting burn in air care. It is also highly compatible with technologies such as fabric care delivery systems."

A Feel-good Pre-aging Tool for Combating OxInflammation

In a 2023 publication in the journal *Neural Regenerative Research*[b], the authors noted, "OxInflammation has been introduced as a new term in the biomedical field to highlight the deep and mutual relationship between the dysregulation of redox and immune homeostasis … Regardless of which is the initial spark, inflammation cannot take place without a concomitant oxidative stress response and vice-versa."

Givaudan Active Beauty developed its new globally compliant CBD molecule alternative, Silybidiol, to address this emergent concern, which has implications both for human health and the well-being of the skin.

The new technology, extracted from the fruit of the milk thistle via a green fractionation process, addresses oxinflammation triggered by exosomal aggressors such as urban photo-pollution.

Silybidiol protects the skin by binding to its cannabinoid (CB2) receptors, thereby activating a cellular crosstalk leading to the activation of the skin's natural defenses and detoxification pathways.

As a result, the skin's oxinflammation balance is maintained.

Givaudan's research has found that Silybidiol significantly improves skin homogeneity—reportedly 2.7x better than CBD. It also boosts radiance (reportedly 1.6x better than CBD).

Romain Reynaud, R&D director, Givaudan Active Beauty notes, "Not only does [Silybidiol] reduce inflammation, which improves skin tone, but it also stimulates the production of beta-endorphins, feel-good peptides that contribute to overall wellness. This dual-action mechanism underlines Silybidiol's efficacy in promoting healthy, radiant skin while supporting emotional well-being."

This well-being effect is effectively on-par with CBD.

Silybidiol is 100% natural origin per ISO 16128 and vegan suitable. Its fractionation takes place at Givaudan's Green Fractionation Center of Excellence extracts materials sustainably using Natural Deep Eutectic Solvents (NaDES). These green solvents are said to enable the extraction of an analyte from a sample according to its physical or chemical properties.

[b]www.ncbi.nlm.nih.gov/pmc/articles/PMC10358664/

Image by vladimirfloyd at Adobe Stock

A Biodegradable Rheology Modifier

Lubrizol's Carbopol Fusion S-20 polymer is an inherently biodegradable rheology modifier that provides thickening, suspension and clarity similar to acrylates copolymer. It is ideal for skin cleansing and hair care applications.

Carbopol Fusion S-20 polymer has a smooth flow that provides a light, soft sensory experience on the skin.

It performs similarly to Carbopol Aqua polymers, with good foam volume, creamy foam texture, pH flexibility and strong rheology modification benefits.

It also suspends zinc pyrithione and silicone emulsions at low use levels with efficient viscosity, per the company.

Carbopol Fusion S-20 polymer addresses all 12 principles of green chemistry. In the manufacturing process, the ingredient maintains a framework for designing and improving materials, products and processes to reduce the impact of chemicals and their synthesis on the environment and health.

The ingredient includes free-from genetically modified organisms (GMOs), ethoxylated ingredients (EO) and polyethyleneglycol (PEGs), has a low carbon footprint, and contains starch, a renewable resource with good traceability.

Ethically Farmed Regenerative Skin Care

Expanscience Ingredients' Gaïaline (INCI: *Linum usitatissimum* (linseed) seed oil) is an active with the ability to regenerate the skin.

The technology is derived from flax produced via regenerative farming on an "Au Cœur des Sols" (Conservation Agriculture) certified farm and oil mill.

In-vitro and ex-vivo studies reportedly show that Gaïaline protects the key markers of the epidermis (the dermo-epidermal junction [DEJ]) and the dermis (telomeres, keratin 10, filaggrin, hyaluronic acid). It also ensures the integrity of the stratum corneum by boosting ceramides, keratin 14 and collagen 17, per Expanscience Ingredients.

A clinical study on 48 women (Gaïaline vs. placebo) reportedly confirmed that Gaïaline strengthens the skin barrier by stimulating the skin's essential lipids (long ceramides) and maintains its moisture. It also reduces the skin micro-relief, class 1 wrinkles and unevenness for a smoother complexion, per the company. Gaïaline therefore protects, strengthens and regenerates the barrier function to slow down skin aging, per the company.

A second clinical study was conducted to demonstrate the effectiveness of Gaïaline on hair, determining that the ingredient protects damaged hair from daily deterioration (discoloration, blow-drying and heat) by creating a protective sheath.



A clinical study on 48 women (Gaïaline vs. placebo) reportedly confirmed that Gaïaline strengthens the skin barrier by stimulating the skin's essential lipids (long ceramides) and maintains its moisture.

The 'New Niacinamide'?

SC Group's (Spec-Chem Industry Inc.) SpecBio Ectoine (INCI: ectoin) is a natural cell-protecting agent for the skin.

Ectoin is reportedly the most prominent osmolyte in nature, helping organisms to survive extreme conditions in order to restore their normal cell volume. As a result, in 2023 *Allure* described ectoin as the "new niacinamide."

SpecBio Ectoine is reported to promote collagen synthesis, defend against photoaging and provide lasting moisturizing effects. Additional claims include anti-allergy and soothing effects.

The highly polar amino acid is obtained by fermentation and is EcoCert and COSMOS approved.

High-performance Sustainable Ingredients for Makeup

Lubrizol Life Science Beauty recently launched a range of makeup concepts, Chromatic Rules, featuring formulations offering ready biodegradability, high natural origin content and the performance consumers demand.

The collection of formulations featured ingredients with newly tested benefits for makeup applications, including:

- Kelo-Care diutan gum (INCI: *Sphingomonas* ferment extract), a fermentation-derived water-soluble biopolymer offering efficient rheology modification, was featured in the company's Matt-finish Watery Primer and Soft and Lift Mascara Primer formulations.

Image by Yakobchuk Olena at Adobe Stock

- PemuPur STARTpolymer (INCI: microcrystalline cellulose (and) *Sphingomonas* ferment extract (and) cellulose gum), a natural-derived polymeric emulsifier with pronounced stabilization capabilities and quick break sensory effects, was featured in the Glow-all-around Tinted Serum.
- Oilkemia Alpha POF polymer (INCI: hydrogenated poly (C6-20 olefin) (and) HDI/trimethylol hexyllactone crosspolymer), a rheology modifier that creates textures and thickens oil systems, was featured as part of the Color-blazing Lip Jelly and Silky and Creamy Eyeshadow Stick formulas.

A Bio-engineered Growth Factor Anti-ager

Core Biogenesis' Peauforia anti-ager comprises fibroblast growth factor 2 (FGF-2) bio-engineered within *Camellia sativa* plants; this FGF-2 is then fused with oleosomes. The bio-engineering process reportedly removes the ethical and carbon-intensive production processes required for conventional growth factor sources.

The technology reportedly addresses the decline of FGF-2, epidermal growth factor and other growth factors that begins in one's 20s.

By replenishing growth factors, users of the technology can reportedly achieve notable results within 14 days, including a reduction in the appearance of fine lines of wrinkles. In fact, Peauforia usage can lead to a 522% improvement in these results after 28 days, compared to a placebo.

The ingredient technology also reportedly reduces melanin to diminish hyperpigmentation, boasting a 246% improvement in 28 days compared to a placebo.

Conventional Naturals with In-demand Benefits

Extracts Unlimited LLC's Batana Oil Unrefined is expressed from the fruit of the *Elaeis oleifera* plant, which is formed by the hybridization of the palms *Elaeis guineensis* and *Elaeis oleifera*, Palmaceae. Batana oil is purported to have hair and skin benefits, including moisturization and addressing split ends.

The company also offers Pumpkin Seed Oil obtained from the dried kernels of the pumpkin plant, *Cucurbita pepo*, by cold pressing. The oil can be used as an emollient and carrier in cosmetic formulations and has strong skin conditioning effects, per Extracts Unlimited. It is also antioxidant-rich and thereby highly stable.

Praan Naturals, meanwhile, offers Organic Virgin Date Kernel Oil, which reportedly helps to soothe, moisturize and protect the skin and hair for a healthier, more radiant and youthful appearance. It can also support normal hair growth, per the supplier.

High Naturality Rheology Modifier

SNF's Natursol EMI Lite reportedly merges performance with sustainability for skin care. The rheology modifier combines light texture and stabilizing performance, boasting a naturality index of 78% and offering a variety of textures while remaining eco-conscious.

Sustainable Sensitive Skin Solutions

A Gentle Salicylic Acid Alternative

Active Concepts' ACB Sal-Vation is a sustainable salicylic acid alternative derived from sugar beets and prunes.

The new technology benefits from benzoic acid, which is naturally found in prunes and which has a lipophilic nature that is similar to salicylic acid, a well-known chemical exfoliant.

This lipophilic nature allows ACB Sal-Vation to remove intercellular lipids for successful exfoliation, per the company, without the irritation associated with salicylic acid.

ACB Sal-Vation also possesses antimicrobial and antifungal properties, making it particularly effective in combating acne and other skin infections, per the company.



Equibiotics LA is obtained through the preservation of Lactobacillus acidophilus, a bacterium known for its positive effects on gut health.

Meanwhile, the technology's succinic acid, found in sugar beets, offers anti-inflammatory benefits, making it suitable for sensitive skin types; it is also known to promote collagen synthesis.

The company partnered with a family owned farm in Northern Ohio where it sources sugar beets from a supplier that prioritizes regenerative farming. The company also sourced prunes from a family-owned farm in California.

A Gentle Microbiome Balancer for Sensitive Skin

Roelmi HPC's EquiBiotics LA is designed to boost the skin barrier, reduce inflammation, balance the skin microbiome and address the needs of sensitive skin.

This probiotic-derived ingredient is obtained via *L. acidophilus* PBS066 integral-structure preservation and is able to modulate the amount of inflammatory TNF-alpha while also boosting the skin barrier for better defense against environmental aggressors, pathogens and moisture loss.

EquiBiotics LA also balances the skin microbiota by promoting a healthy ratio of beneficial bacteria on skin, which can be disrupted by factors such as pollution, harsh skin care products and stress. This balance helps retain the skin's moisture and further reduces inflammation and irritation associated with acne, eczema and rosacea.

The beneficial bacteria found in EquiBiotics LA can also support the natural skin renewal process. ■

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Consumer demands for holistic SPF-infused beauty are shifting rapidly, encompassing new formats, emerging claims and much more. How can brands tap into these trends and capture market share?

Image by Pixel-Shot Studio/Adobe Stock

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The Sunification of Beauty: Top Innovation Opportunities for 2024-2025

New ingredients, claims and consumer preferences are shaping multifunctional product innovation for UV defense.

Consumers want sun care, but their preferences are shifting radically, signaling significant opportunities for brands to tap into the sunification of beauty. Here's what the data tells us and how brands and emerging ingredient technologies offer a path forward to capture market share.

What Consumers Are Looking for From SPF Beauty

A July 2024 study by behavioral insights platform Veylinx recently found[a] that just 30% of the 1,609 U.S. consumers surveyed apply sunscreen daily during summer, while just 27% use sunscreen year-round.

When consumers do use SPF, here's what they seek out. Per Veylinx, "65% of consumers prefer sunscreens with a SPF greater than 40," while 57% "seek out moisturizers with built-in SPF."

The report also points out that almost 75% "prefer using tinted foundation with sun protection." This is backed up by a July 2024 Trendalytics report[b] pointing out that tinted SPF searches are up 84% year-over-year, while searches for SPF foundations are up 23%.

Data from a Spate x Symrise report from May 2024 notes that top search terms associated with tinted foundations included "oily

[a]www.prnewswire.com/news-releases/study-uncovers-growing-sunxiety-and-demand-for-multi-functional-sunscreen-302187269.html

[b]https://blog.trendalytics.co/summer-suncare-trends

skin," "mature skin" and "aging." Separately, a June 2024 report from Spate pointed out that tinted sunscreen searches have benefited the brand Alsastin, which markets SKUs such as the HydraTint Pro Mineral Broad Spectrum Sunscreen SPF 36 and has experienced a more than 100% year-over-year jump in U.S. online searches.

Reflecting this trend toward tinted hybrid products, Lubrizol recently developed a range of hybrid sun care products, including a tinted SPF moisturizer, a lightweight, all-mineral sunscreen with UVA and UVB protection.

Veylinx's report notes an uptick in demand for SPF products with hydrating benefits, while Trendalytics reports that SPF moisturizer searches are up 22% year-over-year.

Other key claims cited by the two reports include a demand for:

- Clear formulations with no white cast
- Reef-safe claims (shoppers are willing to pay 14% more for such products)
- Formats such as serums and lip balms
- SPF plus anti-aging benefits (related: the Veylinx report highlighted a high desire for formulations comprising vitamin C)
- K-beauty inspiration, per a June 2024 report, as seen with a more than 420% jump in U.S. online searches for "Tocobo sunscreen stick," referencing a K-beauty brand that offers SPF beauty in a convenient format



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Surfer Kelly Slater has launched a direct-to-consumer skin care brand, Freaks of Nature, that encompasses so many of the concerns and trends surfaced in data cited by Spate, Trendalytics and Veylinx.

SPF Beauty Trends in Action: Freaks of Nature

Surfer Kelly Slater has launched a direct-to-consumer skin care brand, Freaks of Nature, that encompasses so many of the concerns and trends surfaced in the data cited by Spate, Trendalytics and Veylinx.

The brand was spawned in cooperation with investment and incubation firm Squared Circles, which previously collaborated with brands such as Nutrafol and Phyla Biotics. Additional investors in Freaks of Nature include Mike Meldman, co-founder of Casamigos tequila and founder of Discovery Land, and actor and filmmaker Jonah Hill.

(Squared Circles itself is backed by L Catterton, Regeneration.VC and David Bonderman.)

The new brand is designed for "outdoor enthusiasts + athletes," per Freaks of Nature, and is focused on key concerns such as skin barrier

From top: image by mellisandra; Freaks of Nature at Adobe Stock

health and targeted solutions that address sun and wind exposure, pollution and heat, and sweat, all well preserving the balance of the skin microbiome.

"My entire career I've been looking for products that are engineered for performance and built for me as a professional athlete, but that are not detrimental to my body or the planet," says Slater. "With Freaks of Nature, we've finally cracked that code, enabling athletes to go harder at their sport for longer."

The Deeper Dive Moisturizer ($48) comprises a post-biotic *Bacillus* ferment to provide prebiotic support to the skin microbiome and brown algae extract to boost collagen and hydrate the skin.

Per MyMicrobiome, "Some sunscreens may disrupt this delicate microbial balance[c], potentially leading to skin issues such as inflammation and irritation. Therefore, the formulation of microbiome-friendly sunscreens is becoming increasingly important."

(The moisturizer's microbiome claims were validated with the HelloBiome platform.)

The moisturizer also highlights "bio-fabricated" squalane, which is also featured in the brand's sunscreen.

The Daily Defender Sunscreen ($35), meanwhile, delivers SPF 30 defense with 18% non-nano zinc oxide. As such, it is reportedly reef-safe and compliant with Hawaii's reef act 104.

The formulation comprises Bolt Threads' B-silk biobased and vegan polypeptide, which acts as a reportedly superior alternative to silicone elastomers.

The polypeptide acts as a biodegradable film former to render products silky soft on the skin while providing a barrier against pollution, blue light and even UV, per Bolt Threads.

The technology helps support 40-minute water resistance for the formulation.

"The outdoor athlete is the ultimate embodiment of what we call at Squared Circles the Conscious Maximalist consumer," says Lukas Derksen, co-founder of Squared Circles. "A highly discerning audience who will refuse to compromise on product performance or sustaining the planet. Freaks of Nature clearly delivers on both."

Water-based SPF Defense is on the Rise

A May 2024 SPF trend report from Spate and Symrise noted that searches for water-based sunscreens have spiked 243.6% year-over-year, reflecting consumer desires for fluid and transparent textures in their UV defense products.

To that end, Shin-Etsu Silicones Europe B.V. recently introduced SPD-WT1 (INCI: titanium dioxide (and) butylene glycol (and) hydrated silica (and) polyglyceryl-3 disiloxane dimethicone (and) hydrogen dimethicone), a high concentration dispersion of hydrophobic treated ultrafine titanium dioxide (TiO_2) in water.

SPD-WT1 offers sensorial benefits and SPF properties in addition to its environmentally friendly profile by using water instead of organic or synthetic solvents—notably for sun care applications.

The technology provides high transparency and fluidity to formulations and, as a low viscosity dispersion, it is reportedly easy to mix into water.

Notably, the technology is also waterproof but easy to wash away.

Key features of the ingredient include:

- Aqueous dispersion of hydrophobic treated ultrafine TiO_2 that can be added to the water phase.
- High concentration TiO_2 dispersion making it easy to create high SPF products.
- Achieves both water resistance and washability with soap
- Low viscosity and easy-to-use
- ISO 16128/Natural Origin Index (NOI): 76.5%



A May 2024 SPF trend report from Spate and Symrise noted that searches for water-based sunscreens have spiked 243.6% year-over-year, reflecting consumer desires for fluid and transparent textures in their UV defense products.

Image by Anna at Adobe Stock

[c]www.linkedin.com/feed/update/urn:li:activity:7213538708417875969/

According to the supplier's head of sales/cosmetics, Martin Kropfgans, Ph.D., "If you have a water-based formulation, you might assume it is not water resistant—but we have data showing that it is. The data was the result of a test, where we applied each dispersion to synthetic leather and water resistance as well as washability were evaluated. As a conclusion, while being water resistant, it's quite easily removable if you use soap—whereas other water-based formulations were not water resistant."

Simplified SPF: Doing More with Less

Amid a general push in beauty toward simpler, more multifunctional formulas, as well as demands for reef-safe SPF products, emerging technologies offer brands an opportunity to deliver defense with higher efficiency and lower costs.

For instance, Sharon Personal Care's Capsol multifunctional sun care encapsulation and delivery system (INCI: *Carthamus tinctorius* (safflower) oleosomes, aqua) reportedly allows brands to cut their formulations' organic actives loads by as much as 50-80% without any degradation of SPF defense.

In effect, the hydro-soluble liquid technology, which has emulsifier properties, can boost environmental safety and sustainability while reducing formulation costs.

Furthermore, Capsol's oleosin protein, phospholipid membrane and triacylglycerol component content nourishes the skin, per Sharon Personal Care. The technology thereby reportedly offers a "superior" skin feel. It also supports water resistance without the need for additional film formers.

Capsol is therefore recommended for applications such as daily wear SPF moisturizers, beachwear sunscreens, daily wear SPF color cosmetics and anti-aging skin care applications.

Lubrizol's recent sun care concept collection also tapped multifunctionality with its Age Defense Eco-friendly 1 SPF 50+ organic sunscreen.

The fluid sunscreen featured a "good ecological profile," per the company, and a light sensory experience. The formulation also notably minimized the signs of aging and provided exposome protection.

Another concept in the Lubrizol collection, the Whipped Matte Sunscreen SPF 50, offered a soft and fluffy oil-in-water sunscreen that delivers SPF defense while reducing sebum levels and minimizing the appearance of pores. The whipped-cream-like formulation goes on without white cast, per the company, and offers a "luxurious matte finish."



Amid a general push in beauty toward simpler, more multifunctional formulas, as well as demands for reef-safe SPF products, emerging technologies offer brands an opportunity to deliver defense with higher efficiency and lower costs.

Free-from Sun Care That Works

The previously cited Symrise x Spate report found that mineral sunscreen searches have jumped 27.3% year-over-year. At the same time, searches for zinc and titanium dioxide sunscreens are up 18.5% and 20.2%, respectively, year-over-year.

Clearly, interest in non-chemical sunscreens is on the upswing. But so too are ingredient concerns.

In response, cosmetics manufacturer Sun Deep has developed a sustainable non-chemical sunscreen that manages to satisfy a number of requirements.

The company's latest formulation features plant-derived UV boosters, preservatives and film formers while delivering SPF 30 defense with 80-minute water resistance.

All of this was achieved with no silicone, per Sun Deep.

When the Damage is Done: UV Solutions

Brands also have an opportunity to correct damage already experienced in reaction to UV exposure. Recently,

Image by soft_light at Adobe Stock



Recently, Kiehl's launched the Auto-Tone Discoloration & UV Solution SPF 30 treatment, which reportedly helps to "correct discoloration without shifting skin's natural tone, while helping to prevent future discolorations."

Kiehl's launched the Auto-Tone Discoloration & UV Solution SPF 30 treatment, which reportedly helps to "correct discoloration without shifting skin's natural tone, while helping to prevent future discolorations."

The treatment comprises parent company L'Oréal's Melasyl, a molecule designed[d] to address localized pigmentation issues that lead to age spots and post-acne marks.

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

The underlying technology was reportedly validated in a number of studies. One randomized controlled clinical study noted that Melasyl, known as 2-mercaptonicotinoyl glycine (2-MNG), "inhibited both UV-induced skin pigmentation mechanisms in vivo. The association of 2-MNG with LHA plus MSX showed the highest efficacy on melanin-rich skin with pigmentation induced by UV exposure."

The treatment, which retails for $52, provides SPF 30 defense against future UV damage while tapping Melasyl to homogenize areas of excess melanin to even out the skin tone.

The multifunctional formulation can simultaneously address post-blemish marks, dark spots, dark patches and uneven tone, per Kiehl's.

Countering UV Damage: Hyperpigmentation & Premature Aging

While prevention is the best policy when it comes to UV damage, there are a host of ingredient technologies to address the aesthetic impacts once any damage is done.

Recently, the Center for Drug Design at the University of Minnesota's College of Pharmacy highlighted the benefits of a novel ingredient, ProteXidine, a bomimetic antioxidant technology that reportedly counteracts UV skin damage while inhibiting further damage caused by reactive oxygen species (ROS).

The technology can also reportedly reduce and clear away cyclobutene pyrimidine dimers (CPDs), which are associated with UV-induced mutations that can lead to skin cancers.

Human ex vivo skin culture studies purportedly showed that ProteXidine



BASF's Hydrasensyl Glucan Green (INCI: water (aqua) (and) beta-glucan) reportedly merges beneficial properties of hyaluronic acid and collagen to quickly soothe UV-induced erythema, per the company.

[d]www.gcimagazine.com/ingredients/skin-care/news/22889809/la-rocheposay-the-science-behind-lorals-melasyl-pigmentation-technology

From top: image by Kiehl's; Sendo at Adobe Stock

significantly limited the formation of CPDs in UV-irradiated cultures after 4 hours; after 12 hours, virtually no CPDs were detected in the cultures.

Furthermore, ProteXidine's ability to clear away damaged epidermal cells induces their replacement with healthy cells, per University of Minnesota researchers.

The technology has the potential to maintain the epidermal layer and collagen density in UV-exposed skin, based on results from the skin culture studies.

Based on the current evidence, the researchers recommend ProteXidine for application in anti-aging skin care, hyperpigmentation solutions, anti-photoaging solutions and moisturization boosters.



In an era of consumer demands for efficacy, getting clinical testing right is critical. Especially for OTC products.

Quickly Reducing UV-induced Inflammation

BASF's Hydrasensyl Glucan Green (INCI: water (aqua) (and) beta-glucan) reportedly merges beneficial properties of hyaluronic acid and collagen to quickly soothe UV-induced erythema, per the company.

The ingredient's primary structure in part consists of a long chain of disaccharide units made of two glucose derivatives. This structure enables Hydrasensyl Glucan to bind large amounts of water in the skin, like a natural water-superabsorber, per the company.

The polysaccharide chains of the ingredient are intertwined to form a rope-like, highly resilient triple-helix like collagen. This 3D structure makes it highly stable and resilient under harsh formulation conditions.

The technology quickly soothes UV-induced erythema, while also offering skin smoothing and hydrating properties, per the company.



According to a 2024 Ipsos/Orlando Health Cancer Institute study, 32% of Americans believe that tans make "people look better and healthier."

From top: image by Shawn Hempel; Trendsetter at Adobe Stock

In vitro studies reportedly showed a reduction of UV-induced erythema, short-term and long-term sustainable hydration, and short-term and long-term sustainable skin smoothness.

In vivo studies displayed a reduction of pro-inflammatory mediators, activation of surveillance receptor TLR-2 and protection of circadian gene from blue light.

The beta-glucan active ingredient offers multifunctional claims for applications such as after-sun, face, body and hand care, per BASF.

Efficacy is a Must: Clinicals for Sun-inspired Beauty

Whether offering pre- or post-sun care, product efficacy is everything. This is particularly true in an era of multifunctional hybrid products.

"Brands are seeking more holistic environmental protection claims, combining protection from UV with protection against blue light, ozone and pollution," says Matt Traynor, Ph.D., innovation and validation director, Certified Laboratories. "Daily SPF products are also expected to provide additional benefits such as reduction of fine lines and wrinkles as well as evening skin tone and brightening."

Traynor warns, "Brands need to ensure that any SPF products meet stability/compatibility requirements for OTCs. This ensures effectiveness of sunscreens over the lifetime of the product."

There are a number of claims pitfalls brands need to keep in mind when approaching their SPF and other claims.

"Brands must adhere to good clinical practices (GCP) with third party vendors to appropriately support their claims," says Traynor. "Brands must be careful. They cannot solely rely on testimonials or consumer perceptions for sufficient support."

Traynor adds, "Brands must also clearly state whether a claim supports the product performance or an ingredient benefit. Products must be manufactured in accordance with good manufacturing practice (GMP) and tested prior to release in the FDA registered GMP compliant testing facility."

But what about timelines?

Clinical and consumer studies can take 3-6 months to complete, per Traynor, though in vitro ingredient claim support studies can be accomplished much faster. At the same time, microbiology testing and chemical ingredient assays for batch release requirements can be accomplished in 5 business days or fewer.

Trouble Ahead: Sun Care's Misinformation Problem

Even with solid claims substantiation and clinicals, some consumers may still not trust SPF-focused beauty.

Sun care is indispensable, but it has a misinformation problem. Solving this issue will allow brands to tap into an even wider section of the consumer base.

According to a 2024 Ipsos/Orlando Health Cancer Institute study, 32% of Americans believe that tans make "people look better and healthier."

Just as concerning, 14% of adults under 35 claim "daily sunscreen use is more harmful to the skin than direct sun exposure," per the institute, while 23% "believe drinking water and staying hydrated prevent a sunburn."

Counteracting these beliefs will require robust educational strategies from brands, particularly on social platforms such as TikTok, while also developing products that are easily incorporated into daily beauty rituals. ■



NEW COSMETIC PACKAGING: SUSTAINABILITY MEETS FUNCTIONALITY

From airless tubes to pumps designed to support sustainable fine fragrance, suppliers are ramping up innovation.



Stoelzle Glass Group's Elixir lightweight 30 ml dropper bottle is ideal for serums and foundations.

Courtesy of Stoelzle

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The latest cosmetic packaging launches offer quality consumer experiences and enhanced eco-friendly credentials. Here, we round up the latest introductions in the market.

An Ultra-light Glass Dropper

Stoelzle Glass Group's Elixir lightweight 30 ml dropper bottle is ideal for serums and foundations. At 53 g, Elixir is 32% lighter than Le Perpétuel, the company's lightweight refillable jar, which weighs 78 g.

Elixir's lightweight design results in 32% less environmental impact compared to the standard 30 ml serum bottle, thanks to a reduced consumption of raw materials.

To complement Elixir, Stoelzle offers an array of matching closures that ensure precise dosage and effortless handling, per the manufacturer, as well as various dispensers such as sprayers, pumps, pipettes and more, which are compatible with this new dropper bottle.

In addition, Stoelzle offers more than 20 decoration techniques.

An Airless Tube for Flexible Sustainability

PKG Group/Yonwoo PKG's Ø30 Airless Pump Mono Mild Tube features a tube body with a flat surface for branding.

The polyolefin tube primarily comprises polypropylene to enhance its sustainable profile.

The airless recycle-ready pack can boost products' shelf life, reduce the risk of contamination and makes it easier for brands to incorporate more active ingredients in their formulas.

Notably, the design can preserve products' scent and can effectively contain formulas with lower oil content.

The Airless Pump Mono Mild Tube's design minimizes excessive leakage between the tube and pump.



PKG Group/Yonwoo PKG's Ø30 Airless Pump Mono Mild Tube features a tube body with a flat surface for branding. The polyolefin tube primarily comprises polypropylene to enhance its sustainable profile.

A Pump for Alcohol-free Fragrances

Guerlain is using Aptar Beauty's Sensea Fragrance Pump for La Petite Robe Noire L'Eau Rose, Guerlain's first fragrance formulated without conventional alcohol.

The formulation instead features beetroot alcohol sourced in France.

The limited edition of the eau de parfum is made from 92% natural-origin ingredients.

Sensea offers a fine and homogeneous spray at a wide, 60° angle. It combines a VP4 cartridge optimized for gentle actuation with a high-definition spray (HDS) insert technology.

The pump and collar are anodized in silver and, like all Aptar Beauty's prestige fragrance dispensing systems, are manufactured at its Le Neubourg facility in Normandy, France.

Anne Dupé, key account manager at Aptar Beauty, says, "At Aptar



Guerlain is using Aptar Beauty's Sensea Fragrance Pump for La Petite Robe Noire L'Eau Rose, Guerlain's first fragrance formulated without conventional alcohol.

From top: courtesy of PKG Group/Yonwoo PKG; Aptar/Guerlain



Baralan's new 3D decoration for cosmetic packaging supports more personalized packaging by tapping the printing capabilities of Stratasys and the glass and plastic coating expertise of ICA.



Packaging Mania's custom eyeliner boxes allow brands to protect their products while offering on-brand design options.

Beauty, we provide advanced dispensing solutions to fit the next generation of fragrances, including the alcohol-free formulas now emerging on the market. Sensea offers that perfect balance between high performance and an enhanced user experience. The winning combination of a high-definition spray and gentle diffusion makes Sensea ideally suited for Guerlain's La Petite Robe Noire L'Eau Rose."

Sustainable 3D Deco

Baralan's new 3D decoration for cosmetic packaging supports more personalized packaging by tapping the printing capabilities of Stratasys and the glass and plastic coating expertise of ICA.

The new technique offers three-dimensional glass decoration and plastic accessories using ICA-developed GP3DPrint water-based paint.

The paint can be used to apply 3D graphics on Baralan's cosmetic packaging (glass and plastic) using Stratasys Polyjet technology.

This methodology allows for the mass production of 3D printing while reducing the need for equipment and massive production operations to diversify designs. In short, with the 3D technique Baralan says it is now possible to have a unique product without having to invest in expensive equipment.

Low Minimums for Eyeliner Boxes

Packaging Mania's custom eyeliner boxes allow brands to protect their products while offering on-brand design options.

The packaging is compatible with various eyeliner formats, including gels, fluids and pencils.

The global eyeliner market is forecast to be valued at $6.23 billion in 2024, growing at 4.6% annually to 2031, totaling $9.58 billion.

Packaging Mania reportedly does not feature die cut charges and has no set minimums.

In addition to free design support, the supplier offers free shipping across the United States. ■



L to R: courtesy of Baralan; Packaging Mania

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How Beauty x Wellness Can Address Stressed-out Consumers: New Data

With consumers more stressed than ever, shoppers' quest for multifunctional feel-good products beyond supplements is on the rise.

BY DENISE HERICH, THE BENCHMARKING COMPANY



Seventy-two percent of Gen Z females take a hot bath or shower to alleviate stress, while 66% spend more time on their beauty and personal care routines.

Image by WavebreakMediaMicro at Adobe Stock

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Fifty-five percent of the 4,000-plus U.S. female beauty buyers surveyed in a nationwide study say they are more mentally stressed now than they were five years ago, with 18% saying their stress level is similar to what it was then. At the same time, 89% say the importance they place on achieving a positive state of both physical and emotional well-being has increased during the past five years, with 99% agreeing that their mental well-being and physical health are connected. Results from this original Benchmarking Company study reveal the issues buyers are facing, and the beauty-meets-wellness solutions those Gen Z and older are looking to the beauty and personal care industry to offer. Let's get to the data.

About the Data in this Study

The Benchmarking Company conducted its "Wellness & Supplements" online study, comprising 4,139 respondents, in October 2023.

Wellness is Everything to Women

Nearly all women surveyed (99%) believe that wellness comprises a combination of their physical, mental and emotional health, with 92% saying spiritual health is part of wellness, and 88% saying sexual health plays a part in her wellness circle (**F-1**).

Seventy-eight percent of women say their physical and emotional/mental wellness is equally important to them.

Women's Wellness Activities

Most women (92%) engage in activities designed to improve their sense of wellness, ranging from regular preventative care (86%) to times when she unplugs from technology (44%), as seen in **F-2**.

Women's Stressors

Feeling stressed about loved ones (76%), personal finances (68%) and personal health (53%) dominate her worry list (**F-3**), followed by a lack of civility in the population (46%), wars (44%) and employment issues (39%).

When examining the stressors of Gen Z versus older females, the younger generation is more stressed about personal finances (72%), their own health (61%), their jobs (58%) and their own self-perceived constant use of technology (39%).

Women's Coping Mechanisms for Stress

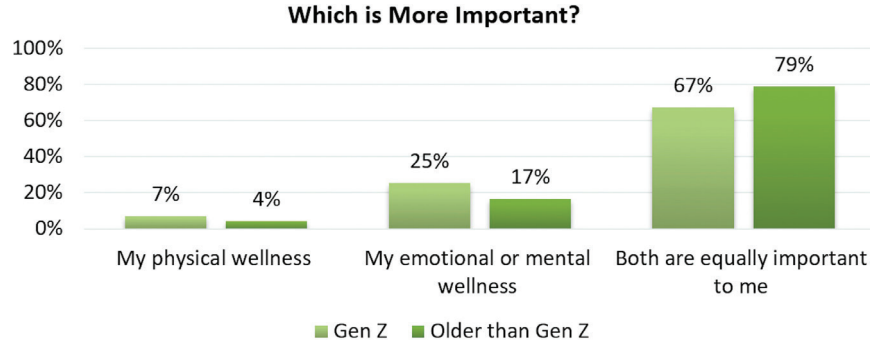
Survey respondents are looking for beauty and personal care products to help her de-stress.

Seventy-two percent of Gen Z females take a hot bath or shower to alleviate stress, while 66% spend more time on their beauty and personal care routines (**F-4**).

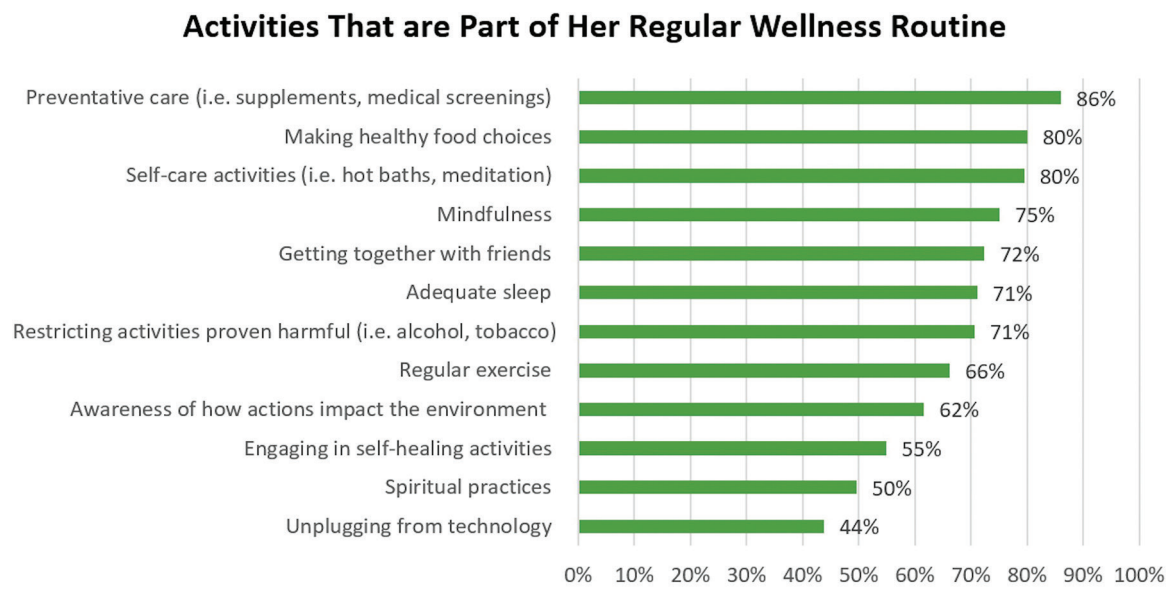
Fifty-eight percent of her older counterparts take a hot bath/shower to unwind, while 48% spend more time on their beauty and personal care routines.

Twenty-two percent of all respondents have used stress-relief

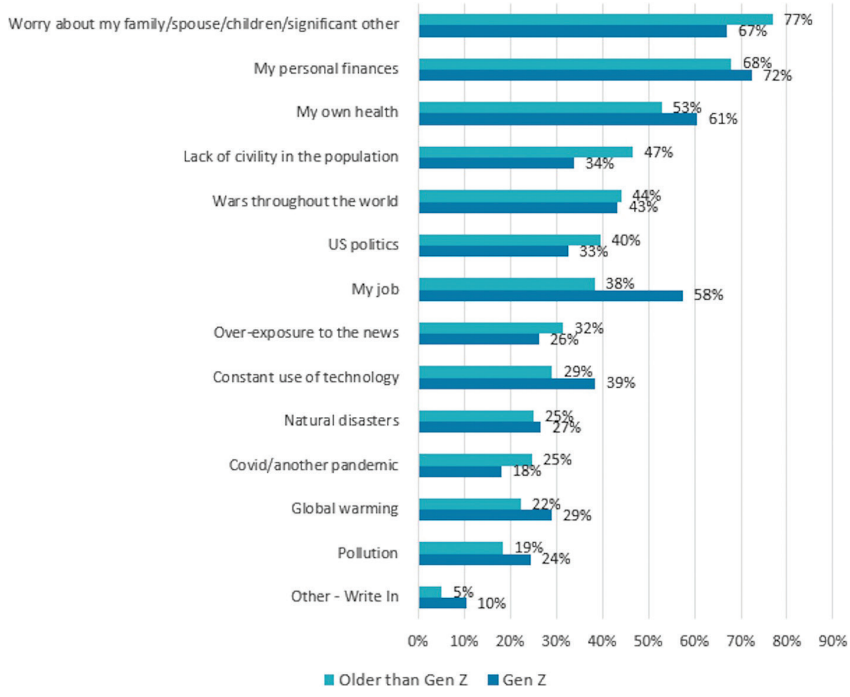
F-1 How women rank their well-being priorities



F-2 Women's wellness routines by activity



F-3 Women's top stressors by generation



patches or fragrance roll-ons as stress-relief aids.

Mood Lifters She'd Like to Explore

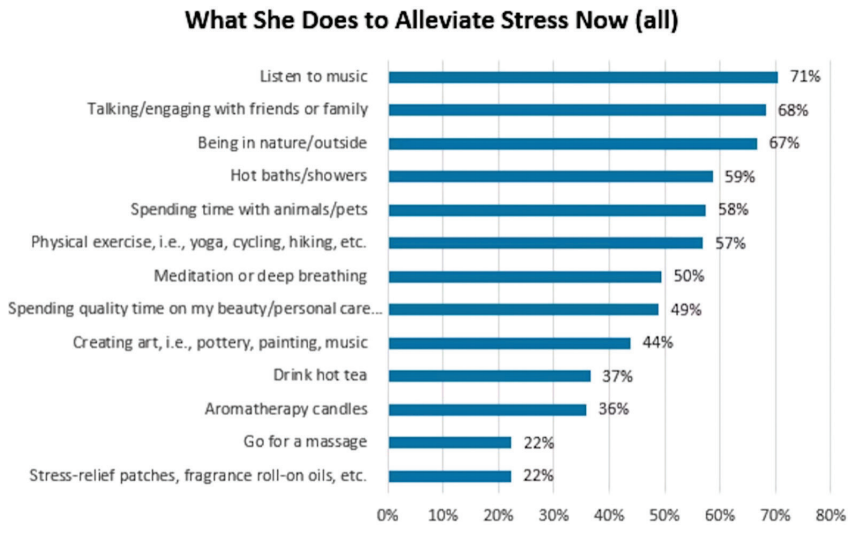
Neurocosmetic products that provide aesthetic benefits (helping her to look good) and feel-good effects are of high interest to 88% of women surveyed; only 6% have tried a product of this type.

Feeling calmed and less stressed is the primary outcome she'd expect from a product of this type. Ninety-two percent of women would be interested in a product that left them feeling calmer and de-stressed.

Benefits She's Seeking

- 92% calming/de-stress/relax
- 81% mental clarity/focus
- 78% happiness
- 73% sleep support
- 71% more energy
- 59% digestive support/gut health
- 55% hormonal support
- 53% enhance sexual pleasure

F-4 How consumers deal with stress



F-5 The supplements shoppers would like to try



Product Types They Want to Try Beyond Supplements

- 80% wellness patches
- 79% light therapy devices
- 76% at-home recovery apparatus/ice bath
- 65% sexual wellness products
- 65% wellness roll-ons/oil roll-ons
- 53% wellness teas/drinks
- 43% wellness aromatics

Supplements for Beauty and Wellness

Seventy-three percent of Gen Z and 84% of those older than Gen Z say they take some type of vitamin or supplement on a regular basis, with 30% of women using supplements for a specific beauty purpose. Of those who do not, 92% would be open to it.

Current beauty supplement users take them for:

- hair growth (79%);
- stronger nails (65%);
- restoring collagen/skin firming (60%);
- clearer skin/healthier skin in general (55%);
- and for anti-aging purposes (40%).

The main reasons she doesn't already use supplements are that she feels they are too expensive (45%), they are too confusing (22%), she's not sure how to use them (18%) or doesn't fully understand what supplements do (16%).

Only 25% of women say they're currently taking an ingestible supplement that supports both beauty and wellness.

Unmet Needs in Wellness & Beauty Supplements

Supplements to support a feeling of calmness, happiness and mental clarity top her list of products she'd like to try (**F-5**).

Ninety-three percent of Gen Z and 87% of older buyers would be interested in buying a customized supplement created for her personal needs that could be shipped directly to her on a regular basis.

Half might prefer an all-in-one pill to meet her specific needs if it was offered and was proven to be effective.

Is your brand ready to deliver on her beauty-meets-wellness needs? ■



Based in sun-seared San Diego, **DENISE HERICH** is co-founder and managing partner at The Benchmarking Company (*www.benchmarkingcompany.com*). The Benchmarking Company provides marketing and strategy professionals in the beauty and personal care industries with need-to-know information about its customers and prospects through custom consumer research studies through its 250,000+ female PinkPanel database, focus group, and consumer in-home use testing (IHUTs) for claims substantiation and risk mitigation.

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