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GLOBAL COSMETIC INDUSTRY®

EDITORIAL

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

SOCIAL MEDIA

Social Media Manager	Emmanuel Henderson | 1-630-344-6020/ehenderson@allured.com

ADVERTISING SALES

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

AUDIENCE DEVELOPMENT

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

DESIGN

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

CORPORATE

Partner & CEO	George Fox
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Allured Business Media
1-630-653-2155 • fax 1-630-653-2192
336 Gundersen Drive, Suite D
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7 Beauty Predictions for 2025

We close our final regular issue of 2024 (next month's edition is our annual supplier directory), I've begun to look ahead at the year to come. Making predictions in the beauty space can be notoriously difficult (we didn't have beauty accessories or the blush boom on our radar at this time last year), there are some clear signals as to what we can expect to see in 2025 and beyond:



Brands providing care for underserved shoppers will be increasingly tasked with delivering proven claims; at the same time, industry research and ingredient development will need to take into account the needs of every skin and hair type, as well as life stage.

1. ***Value:*** Whether focused on efficacy, price point or multifunctionality, choosy shoppers are going to expect more from their products than ever before.
2. ***Proof:*** Shoppers expect products to work and, increasingly, to offer clinical results and expert backing to ratify marketing claims.
3. ***Sustainable scrutiny:*** As brands review the best path toward packaging sustainability, there will be more focus on packaging claims, particularly refills, monomaterial and readily recyclable credentials; at the same time, collection programs such as Pact will offer brands and shoppers a simpler way to divert material from waste streams.
4. ***Longevity and rejuvenation:*** The explosion of regenerative and exosomal technologies proves that beauty's focus on biohacking the aging process has only just begun; expect to see additional launches focused on extending the beautyspan, particularly the hair and skin.
5. ***Clinical inclusivity:*** A companion to the overarching elevated efficacy trend, brands providing care for underserved shoppers will be increasingly tasked with delivering proven claims; at the same time, industry research and ingredient development will need to take into account the needs of every skin and hair type, as well as life stage.
6. ***Biotech revolution:*** Biotech ingredients are hardly new, but a wave of new technologies is coming to market offering not just one-to-one alternatives to conventional ingredients but also claims and functions that were previously unattainable with conventional naturals or synthetic chemistries.
7. ***Gen X:*** Perhaps I'm biased, but it's clear that Gen X's aging cohort and high income make it a key beauty market driver; as this generation redefines aging, from embracing gray hair to gentle aging to sexual wellness, expect to see more brands targeting beauty and care for these shoppers.

But don't take my word for it. Check out our latest Insider Insights report (**Page 6**), featuring experts from packaging, ingredients, market data and more, offering insights into what's to come in beauty next year.

In the meantime, I thank you for reading, watching and listening to us this year; all of us at *Global Cosmetic Industry* wish you a year of peace, success and beauty.

Be well.



JEB GLEASON-ALLURED
Content Director
jallured@allured.com

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INSIDER INSIGHTS:
TOP 15 BEAUTY PREDICTIONS FOR 2025

We prompted a variety of leaders within the beauty industry to share their thoughts on the oncoming trend forecast for 2025.



A clear picture has emerged of beauty's future, one shaped by emerging technologies, increasingly educated and demanding shoppers, and an embedding of sustainability concepts within every element of the industry.

Image by Olesia Bilkei at Adobe Stock

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From elevated efficacy and pro beauty inspiration to exosomes and Gen Alpha, Mintel, McKinsey and a select group of beauty insiders from the worlds of marketing, R&D, packaging and ingredients, and consumer and market analytics have offered their predictions for key 2025 beauty trends.

Based on the responses, a clear picture has emerged of beauty's future, one shaped by emerging technologies, increasingly educated and demanding shoppers, an embedding of sustainability concepts within every element of the industry, and select growth segments through 2028. Let's break it down.

About Our 2025 Beauty Survey

In addition to reviewing recent reports from Mintel and McKinsey, we independently prompted a variety of leaders within the beauty industry to share their thoughts on beauty trends for 2025.

Participants in the survey were asked: "Explain one trend you think will shape beauty in the year to come; this can include anything from ingredients and claims to business/market conditions and manufacturing to consumer and product trends and beyond. And briefly tell us why you think that trend will be important for the industry."

Here's what our experts said.

1. Key Growth Segments: 2025-2028

A 2024 McKinsey report[a] notes that fragrance is poised to continue strong growth for the next four years, particularly in Asia-Pacific. "Globally, we expect price growth to outpace volume growth in fragrance," McKinsey notes, "which the expansion of the luxury price tier will help drive."

The firm adds, "Niche fragrances—those that appeal to 'in the know' consumers without relying on celebrity endorsements—are expected to be among the biggest drivers of growth within this category."

This will encourage large beauty companies to acquire small upstart brands; however, scaling such niche players without "alienating the consumers who helped propel its early growth," will remain a challenge.

Meanwhile, skin care sales are expected to grow 6% annually through 2028, driven by both volume and price increases; men, too, could be a decisive factor in expanding the sector, alongside Gen Alpha shoppers aging into the category.

The hair sector, meanwhile, is expected to continue to benefit from the "skinification" of the category. McKinsey adds, "As for price-related growth, we anticipate price increases to be mostly tied to the development of more sophisticated, and therefore more expensive, products."

This aligns with recent Circana data for the first half of 2024, which found a notable spike in sales for hair care priced above $25.

Finally, makeup category growth through 2028 is expected to be led by Asia-Pacific, the Middle East and Africa. Across the sector, volume growth is anticipated, though competition is exceptionally high. Here, McKinsey nods to the rise of both skin-care-inspired makeup and sustainable and functional packaging that can help brands stand out.

Across categories, mass beauty is expected to grow 5% worldwide through 2028, while masstige will expand by 6%, McKinsey forecasts. Prestige and luxury, meanwhile, will have growth "level out" over the next four years.

2. Escalating Efficacy

Mintel's 2025 beauty trend report[b] notes that today's beauty consumers are "prioritizing functional efficacy and ingredient knowledge" amid a wider movement toward proven claims and demands that products offer multiple benefits.

These consumers are being educated by influencers who demystify the inner workings of the

[a]www.mckinsey.com/industries/consumer-packaged-goods/our-insights/the-beauty-boom-and-beyond-can-the-industry-maintain-its-growth

[b]www.mintel.com/predictive-insights-trends/



Across categories, mass beauty is expected to grow 5% worldwide through 2028, while masstige will expand by 6%, McKinsey forecasts. Prestige and luxury, meanwhile, will have growth "level out" over the next four years.

Image by 晨周 at Adobe Stock

beauty industry, including ingredients and manufacturing, turning shoppers into pro-sumers.

Armed with more knowledge, consumers will demand proven efficacy and precision from beauty products, which will require a new generation of biotech ingredients, encapsulation technologies for enhanced delivery and materials that offer aesthetic-grade benefits.

McKinsey's report concurs that efficacy demands will drive new ingredient tech introductions: "We … anticipate that new, buzzy ingredients—neuropeptides, for example—will continue to fuel growth in skin care over the next few years."

This efficacy focus will impact more than just topical products. Mintel argues that consumers' awareness of the connections between skin health and gut wellness, for example, will spur a further blurring of beauty and nutrition.

That said, a "focus on ingredient safety will expand," Mintel argues, "with consumers paying more attention to environmental factors like water and air quality."



"We'll continue to see momentum for 'elevated everything' innovation across all personal care categories, especially 'elevated efficacy'—including clinically proven beauty care solutions—as consumers prioritize efficacy, 'clean-ical,' and science-backed products," says Jennifer King, director of marketing, cosmetic ingredients NA, Symrise.



Mintel's report notes that today's beauty consumers are "prioritizing functional efficacy and ingredient knowledge" amid a wider movement toward proven claims and demands that products offer multiple benefits.

These concerns will make space for sustainably sourced botanicals, the trend report states, as well as bio-identical ingredients replicated via biotech practices without depleting nature.

As with all things, however, proof will be key. Mintel notes, "To build credibility, companies will highlight the efficacy of their products through scientific testing and innovative ingredients."

"We'll continue to see momentum for 'elevated everything' innovation across all personal care categories, especially 'elevated efficacy'—including clinically proven beauty care solutions—as consumers prioritize efficacy, 'cleanical' and science-backed products," says Jennifer King, director of marketing, cosmetic ingredients NA, Symrise.

She adds, "These buying decisions will continue to be influenced and informed by lifestyle and social media trends like the 'underconsumption trend,' which challenges consumers to be more mindful and intentional in their spending. This emphasizes focusing on high-performing, proven solutions that deliver expected results to win over savvy consumers."

3. Proactive/Preventative Beauty

The demand for proven efficacy fits hand-in-hand with an emerging "mindful, long-term approach to skin care and beauty," Mintel says, "focusing on prevention rather than constant repair."

In this new dynamic, shoppers will deprioritize "quick fixes" in favor of "gradual, lasting results" and preventative care.

Nina Esposito, marketing director of Provital USA, shares, "Prejuvenation,



Nina Esposito, marketing director of Provital USA

From top, L to R: Image by Rawpixel.com at Adobe Stock;; image ourtesy of Symrise; Provital USA

a proactive approach to skin care and beauty, focuses on preventing the signs of aging before they occur rather than simply addressing them once they appear. This trend is gaining significant traction and is expected to shape the beauty landscape well into 2025 and beyond."

Esposito continues, "Consumers are increasingly aware of the benefits of starting skin care routines early, emphasizing prevention through products and treatments designed to maintain youthful skin. Moreover, prejuvenation encompasses a holistic mindset that integrates nutrition, hydration, sun protection and lifestyle choices that promote overall skin health."

Esposito concludes, "Advances in technology and data analytics also allow for personalized skin care regimens tailored to individual skin types and concerns, enhancing the effectiveness of prejuvenation strategies. The market is witnessing a surge in innovative ingredients, such as endophytes, stem cells and antioxidants, specifically targeting early signs of aging by boosting collagen production and improving skin elasticity. As brands focus on educating consumers about the importance of prejuvenation, this proactive approach fosters a sense of empowerment, allowing individuals to take control of their skin care choices."

4. Regenerative Beauty & Exosomes

"There are different trends I see, but focusing on one, I would mention exosomes," says Christine Meier, senior digital marketing manager, Mibelle Biochemistry. "It's a big hot topic now, and I expect more launches and innovations in this exciting field next year, may it be ingredients or finished goods. As it often happens with cosmetic trends, they come from the medical/salon side before they enter skin care and the mass market, same with exosomes."

Meier adds, "I think this trend will be important because these small cell vesicles play a crucial role in cell communication and regeneration. With products boosting the right exosomes, our skin cells will be stimulated to produce more exosomes with collagen stimulating messenger molecules. This leads to an increased production of collagen and elastin in the fibroblasts, which results in a rejuvenated appearance. In my opinion, the scientific edge and the medical origin make them a promising trend for the future."



Christine Meier, senior digital marketing manager, Mibelle Biochemistry

"Exosomes are trending because they represent a significant advancement in skin health and cellular communication," says Krupa Koestline, cosmetic chemist and founder of KKT Labs. "These extracellular vesicles, which are released by cells, carry proteins, lipids and genetic material that facilitate targeted intercellular communication and delivery of functional molecules. In beauty, the realization that exosomes can deliver active ingredients directly to skin cells more efficiently than traditional topical ingredients is a game-changer. The trend has been further propelled by advancements in biotechnology and the ability to isolate and harness these vesicles in stable formulations. With increased understanding of their role in signaling pathways, growth factor regulation, and wound healing, exosomes are now seen as a novel and potent delivery system capable of modulating cellular behavior effectively, hence the spike in interest."



Krupa Koestline, cosmetic chemist and founder of KKT Labs

From top: Image courtesy of Mibelle Biochemistry; KKT Labs

Koestline adds, "Exosomes are valuable in beauty because of their bioactive payload and their capacity to promote targeted skin rejuvenation at a cellular level. Unlike traditional actives that may have limited penetration, exosomes have a unique lipid bilayer structure that allows them to fuse with recipient cells, enhancing bioavailability and stability of the encapsulated growth factors, peptides and miRNA. They play a pivotal role in skin repair, reducing inflammation and stimulating collagen production, offering regenerative properties that can address a variety of skin concerns—ranging from anti-aging to pigmentation and scarring. Essentially, they act as cell communicators and accelerators of repair processes, providing targeted results that are far superior to many conventional ingredients."

Finally, she notes, "Exosomal beauty is likely to evolve in two main directions. First, formulations will become more sophisticated as the isolation and characterization of exosomes from different cellular sources (like mesenchymal stem cells, plant cells and even yeast) improve. This will enable more targeted use for specific skin concerns. Secondly, we may see an integration of personalized skin care diagnostics with exosomal treatments, allowing formulations to be customized based on an individual's cellular needs. Furthermore, leveraging exosomes for more efficient delivery of active compounds will likely extend beyond anti-aging to more advanced dermatological concerns like barrier repair, hair growth and pigmentation disorders. Enhanced stabilization techniques for exosomal content will also play a key role in maximizing efficacy while retaining bioactivity over time, making them a cornerstone of the next generation of regenerative beauty."

5. Gen Alpha Beauty

"The Gen Alpha skin care trend will be important for the personal care industry because this generation represents the future consumer base,"



Becky Stiles, head of marketing, personal care, NA, BASF

says Becky Stiles, head of marketing, personal care, NA, BASF. "Gen Alpha refers to the generation born after 2010, and they are expected to be the most digitally connected and tech-savvy generation yet. As they grow older, their purchasing power and influence will increase significantly."

Stiles adds, "The Gen Alpha skin care trend focuses on developing products and marketing strategies specifically targeted toward this young generation. This includes products that cater to their unique needs, preferences and concerns. Gen Alpha is more likely to prioritize sustainability, inclusivity and transparency in their choices, and they are more willing to experiment with new products and brands."

She concludes, "By tapping into this trend, the personal care industry can establish long-term brand loyalty, as Gen Alpha will grow up with these products and continue to use them in the future. Additionally, this trend can drive innovation in the industry as companies work to create safe, effective and environmentally friendly products that resonate with Gen Alpha consumers. One example is to formulate with biobased, sustainably sourced, non-sulfate surfactant alternatives like the alkyl polyglycosides (APGs) non-ionic surfactants to create gentle but effective sustainable products. Therefore, embracing the Gen Alpha skin care trend can help companies stay relevant, capture a new market segment, and secure future growth."

6. The Aesthetic-ization of Beauty

Building on these themes, beauty inspired by medical aesthetics will further fuel shoppers' demands for



Expect to see rising popularity for lasers and Botox-like treatments among consumers of all ages, as well as increased openness about the use of such services.

From top: images courtesy of BASF; Drobot Dean

efficacy, precision and, in some cases, preventive care over reactive care.

Mintel notes in its 2025 consumer trend report, "[T]he norms around health and beauty will see a notable shift. The use of weight-loss drugs and cosmetic surgery will become normalized. As a result, aspirations about looks and well-being will evolve."

Expect to see rising popularity for lasers and Botox-like treatments among consumers of all ages, as well as increased openness about the use of such services.

As noted earlier, this trend will also escalate the deployment of aesthetic-grade ingredients in beauty "to deliver clinical-level results and foster consumer loyalty," per Mintel.

These trends are already shaping major industry deals. For instance, in August 2024, CeraVe parent L'Oréal took a 10% stake in Cetaphil parent Galderma Group AG. The deal included not only an investment, but also a scientific partnership to jointly develop new products across both companies to address the signs of skin aging. For L'Oreal, the deal signaled a significant pursuit of the aesthetics market.

That same month, Crown Laboratories, Inc. and Revance Therapeutics, Inc. announced their intention to merge into a single enterprise valued $924 million. The move unites skin care and aesthetics expertise, bringing together brands such as Daxxify (toxin), the RHA Collection (filler), SkinPen (microneedling), PanOxyl (acne), Blue Lizard (sunscreen) and StriVectin (anti-aging).

This is just the beginning.

7. The Simpler, the Better

A desire for efficacy fits well with another trend: a desire for minimalist routines and multifunctional products.

This simplification of beauty addresses consumers "weary of complex, multi-step routines and the pressure to follow rigid guidelines," per Mintel.

Simplified routines are also less stressful than complex, demanding multi-step rituals.

By paring down the consumer experience, brands can reinforce their value to choosy shoppers while ensuring beauty remains an enjoyable, anxiety-free experience.

8. Off-label Beauty

Increasingly educated consumers are also behaving in ways not anticipated by marketers and product developers.

Via social media, many shoppers are trading tips and tricks, including the use of products for "off-label," or unanticipated, purposes.

Mintel points to the use of self-tanners as bronzers or Vaseline for skin slugging routines. These types of practices could boost the value of products in the minds of consumers.

Shoppers and influencers are infinitely creative; use of products in unintended ways could inspire new product innovation as well as novel marketing strategies for existing SKUs.

9. Reinventing Sourcing

The demand for efficacy, paired with climate change pressures, will continue to reinvent beauty sourcing.

This will open up advanced agricultural practices, upcycling programs and the production of zero-waste products, Mintel argues.

As noted earlier, this promises increased use of biotech to generate safe, effective and sustainable technologies.

Jeffrey Martin, director of marketing, FP Labs at Federal Package observes, "Consumers are demanding it [sustainability] from brands. Brands are asking for it in manufacturing. Manufacturers are looking for it in their suppliers. Beauty and personal care consumers are incredibly savvy and are looking hard at ingredients, packaging, and the overall mission of brands."

Martin adds, "They are demanding greater transparency in ingredient use, sustainable practices and making sure the brands they choose align with their personal beliefs. Many brands are rising to this challenge and developing products that are more effective, environmentally friendly and safer for consumers. Similarly, manufacturers are working more closely with brands to find sustainably sourced, reliable ingredients that are pleasing to consumers."



Jeffrey Martin, director of marketing, FP Labs at Federal Package, observes, "Consumers are demanding it [sustainability] from brands. Brands are asking for it in manufacturing. Manufacturers are looking for it in their suppliers."

10. Next-level Sustainable Packaging

Alongside more ethical ingredient sourcing, the future of beauty increasingly incorporates sustainable packaging, including biodegradable materials (including cardboard tubes and refillable formats, particularly in China and Japan) and in-store recycling schemes that simplify the consumer experience, particularly for hard-to-recycle packaging components.

Some brands are even tapping home-compostable packaging, Mintel notes, though these efforts aren't yet widespread.

Aerosols' Role in Clean Beauty

"As consumers, especially millennials, focus on cleaner products, clean beauty is experiencing

Image courtesy of FP Labs at Federal Package;

tremendous growth within the global beauty market," says Vinay Menon, senior platform manager, aerosols: valves, BOV and accessories, Aptar Beauty. "Forecasters expect it to double in size between 2022 and 2028 to $14 billion[c]. With cleaner products, the need for the aerosol packaging to look cleaner, premium yet simple becomes key. Another advantage with aerosol is the 'to go' feature and the convenience for consumers to apply the product. Within the aerosol market, dry shampoos, face settling and all-body deodorant spray segments are already experiencing a high level of market penetration and the trend is expected to grow further especially with a huge increase in indie brands in the NA market."



Samantha Burd, co-owner of Lady Burd Cosmetics

PCR vs. Refillables

Amy Pan, CEO, Epopack, says, "For 2025, I think the strongest drive will be the PCR PET. Based on a few strong regulations' push, PCR PET became essential for some products. In the past two years, refillable packaging has been going through ups and downs and a lot of brands realized the refillable ideas are not as practical as they thought and we have seen multiple big brands opt out the refillable options. As they have experienced the complication of the refillable system, something simple and easy to be recycled will be the way to go."

[c]www.forbes.com/sites/meimeifox/2023/12/22/green-glamour-12-clean-beauty-brands-leading-the-eco-revolution/



Dana Peterson, director of marketing, ICONS Beauty Group.

Monomaterial & Bespoke Packaging

"There are a few trends we anticipate in the next year but I believe the most dominant trend will be a strengthened demand for sustainable, monomaterial recyclable products," says Dana Peterson, ICONS Beauty Group's director of marketing. "At ICONS|ICS, an ICONS Beauty Group company, we have seen a dramatic increase in the demand for bespoke new tooling shapes and eco-friendly embossed or debossed decoration vs. adding second process finishes and only see this trend continuing to grow as brands continue to look for packaging options that will help them meet their sustainability targets."

Peterson adds, "Brands and consumers alike are looking for monomaterial PET, PE, PP and glass products that can be easily curbside recycled. Our new tooling and design team has doubled in recent years to meet the demand for custom embossed/debossed logos and innovative designs in tubes, bottles and jars, as well as a surge in demand for custom designed monomaterial packaging in bespoke shapes that help brands stand out with a premium aesthetics while at the same time keeping true to their product and corporate sustainability targets."

11. Customization & Personalization on the Rise

Samantha Burd, co-owner of Lady Burd Cosmetics, says, "We are seeing the continued shift to custom formulation projects, which now take up the bulk of our time. All of our clients want to add a custom touch or a personal flair to their products, and ensure their products are unique to them! CMs will have to change their business model to accommodate this shift. For us personally, we are bringing on more chemists to accommodate the uptick in projects! We are also shifting our sales process to focus more on education around the custom formulation space, and providing infographics to aid our clients with all the information they need when pursuing custom projects."

Lorne Lucree, founder, Quiet Coyote Consulting, adds, "I believe we will begin to see the emergence of what I'm calling 'personalization 2.0' in 2025. Whether it's ingredients like exosomes

From top: images courtesy of Lady Burd Cosmetics; ICONS Beauty Group



Lorne Lucree, founder, Quiet Coyote Consulting



"One trend that will shape the beauty industry in the year to come is the convergence of personalized beauty solutions with sustainability," says April Vignone, president of Trendsetters International, innovative product and packaging development division, Verla International, Ltd.

that deliver a key performance benefit but work uniquely in each individual's skin, or utilizing the microbiome (which is unique to everyone) to drive a common performance result, or using AI tools like Perfect Corp. (or others) to show customized B&A's of the consumer in real time—all of this is a different take on personalization than we've seen to date. I call that 'personalization 1.0,' which takes a 'formulated especially for you approach' but can sometimes seem gimmicky or lacks credibility with an increasingly educated consumers. I believe this new 2.0 approach can actually be scaled and nicely balance scientific credibility while being operationally sound."

"One trend that will shape the beauty industry in the year to come is the convergence of personalized beauty solutions with sustainability," says April Vignone, president of Trendsetters International, innovative product and packaging development division, Verla International, Ltd. "Consumers are increasingly seeking tailored products designed to fit their unique skin type, lifestyle and preferences, while also demanding eco-friendly formulations, transparent sourcing, and ethical practices. This fusion of personalization powered by AI and data analytics with a commitment to clean, sustainable beauty will be a driving force in the industry."

Vignone continues, "This trend is important because it allows brands to create highly targeted, effective products that not only enhance customer satisfaction and loyalty but also align with the growing demand for environmental responsibility. As a contract manufacturer, we are poised to support brands in this evolution—offering flexible production processes that meet the demands of personalized formulations, while also implementing sustainable practices, from sourcing ethically to offering eco-friendly packaging. Partnering with us ensures that brands can deliver on both personalization and sustainability, creating high-quality products that resonate deeply with today's conscientious consumers."

12. Age-agnostic Beauty

"Another shift we see gaining traction is the emergence of 'age-agnostic' beauty," says Symrise's King. "A diverse range of generations of consumers are seeking solutions for skin longevity, hair health and climate care. Recent heightened interest in beauty by Gen Alpha to boomers will see universal and targeted solutions such as collagen banking, multifunctional sun care and neuro-cosmetic solutions embraced across the age spectrum."

13. Wellness & Neuro-driven Beauty

Jennifer Stansbury, co-founder of The Benchmarking Company says, "Our prediction is that neuroscience will be front and center in the development of new products and product lines through 2025. Many brands are actively engaging scientists in the product development phase to understand how specific sensorial aspects of its products can stimulate neurotransmitters such as dopamine, serotonin and endorphins to evoke specific emotions. From beauty supplements that address the gut-brain connection to skin care products that are developed using the principles of psychodermatology to signature fragrances designed to bolster one's mood or evoke memories and emotions, neuroscience is helping brands create more meaningful and lucrative connections with consumers."

Wellness in Every Category

Larissa Jensen, senior vice president and global beauty industry adviser at Circana, says, "One of the biggest trends that will impact the beauty industry in the years to come is the rising importance of self-care. Most Americans practice self-care and have



Jennifer Stansbury, co-founder of The Benchmarking Company

From top, L to R: images courtesy of Quiet Coyote Consulting; Trendsetters International; The Benchmarking Company

Trendsetters International



Larissa Jensen, senior vice president and global beauty industry adviser at Circana, says, "One of the biggest trends that will impact the beauty industry in years to come is the rising importance of self-care."

prioritized it in some way, with 77% practicing self-care in the form of mental wellness. This is important because many elements of beauty connect to mental wellness. While makeup and fragrance are the more traditional mood boosting beauty categories, we have seen how even a category as basic as personal cleansing is taking a greater role in bringing joy to consumers through neurologically proven scents triggering happiness."

Jensen adds, "As wellness seeps into every category, beauty as a form of self-care is not going away. Consumers have reported they are incorporating skin care into their wellness routines and turning to other beauty categories like fragrance and hair styling products to make them feel good and lift their moods. Wellness has evolved and beauty is one of the rare industries that meets at the intersection of the key pillars of both physical and mental wellbeing that define it."

Sensory & Mood-boosting Innovation

Cherie Buziak, brand strategist and marketing product designer of BeautyEdge, says, "Consumers are looking for beauty solutions that provide a sensory, mood-boosting experience. In a world where joy and light-heartedness can feel distant, beauty products that deliver emotional comfort and happiness are gaining popularity. This shift is exemplified by Givaudan's award-winning Neuroglow, which was recognized at in-cosmetics Latin America for its mood-enhancing properties. This innovation is part of a larger trend, where beauty ingredients and products offer emotional benefits, creating a 'feel-good' factor that goes beyond skin deep."

Buziak adds, "Additionally, a wellness practice gaining attention is craniosacral therapy (CST), a gentle, light-touch therapy that releases deep tension in the body, helping to relieve pain and improve overall health. This aligns perfectly with the beauty industry's growing focus on therapies that enhance both physical appearance and emotional well-being. CST, like many other holistic treatments, offers dual benefits—improving how people look and feel."

She concludes, "Mood-boosting, holistic approaches are becoming essential for brands looking to connect with consumers on a deeper level, addressing both their physical and emotional needs."

Integrative Vitality

"Consumers are increasingly adopting a forward-thinking approach to health and beauty, transitioning from reactive measures to holistic, future-focused strategies for aging," says Michelle Chavez, vice president of innovation of Accupac/Cobalt Labs. "This shift signals a profound evolution in both mindset and product development, where high-performance beauty products will prioritize long-term skin health while also addressing environmental impact in innovative ways."

Chavez adds, "In 2025, the beauty industry will fully embrace 'integrative vitality,' a trend that seamlessly blends health, well-being, and product performance into a proactive, interconnected approach. The concept of 'integrative' emphasizes the importance of harmonizing all aspects of well-being—from skin care to lifestyle choices—into a unified framework that supports tangible results for overall health. Beauty solutions will no longer be limited to short-term effects but will focus on long-lasting, multi-faceted benefits. 'Vitality' represents the commitment to sustaining energy and youthfulness, enhancing resilience, and boosting confidence. Together, the principles of integrative vitality will appeal across generations, where self-care and product efficacy combine for multi-dimensional, meaningful and lasting results."

She adds, "This evolution goes far beyond aesthetics, offering hyper-personalized formulations designed to enhance both physical and mental well-being, creating a deeper connection between health and beauty. With advancements in cutting-edge biotechnology and real-time personalization, consumers will have access to preventative solutions that promote regeneration and balance. And as demand grows for brands that align with eco-conscious values, these innovations will lead to products that are not only effective but also environmentally responsible."

Chavez concludes, "As integrative vitality continues to shape the future of beauty and personal care, emerging solutions will empower consumers to take control of their health and beauty



Michelle Chavez, vice president of innovation of Accupac/Cobalt Labs

From top: images courtesy of Circana; Accupac/Cobalt Labs

in unprecedented ways. Ultimately, this trend will redefine personal care as a key part of a vibrant, fulfilling life—where beauty and well-being are seamlessly intertwined resulting in high performance, personalized products that support a thriving lifestyle."

14. Beauty Shopping Realignment

Anna Mayo, vice president of NielsenIQ's beauty vertical, says, "We are in the midst of a retail realignment that is shifting the way consumers shop for beauty. E-commerce has continued to grow and 42% of beauty and personal care sales are now made online. That number is on track to increase to closer to 50% in the next few years, and this shift has significant impacts on both product replenishment and discovery."



Anna Mayo, vice president of NielsenIQ's beauty vertical, says, "We are in the midst of a retail realignment that is shifting the way consumers shop for beauty. E-commerce has continued to grow and 42% of beauty and personal care sales are now made online."

Mayo continues, "Increasingly we see that Amazon, the #1 U.S. beauty retailer, is the first stop for shoppers looking to replenish products, benefiting from the retailer's competitive pricing and quick shipping. For discovery, TikTok Shop has become a destination for shoppers to learn about, and eventually purchase new products, and it's creating a massive need for new innovations to keep a brand top of mind with the ever important beauty creator community. Not far behind is the quick rise of Temu and Shein, who are further encouraging impulse purchasing and discovery. In the face of this e-commerce revolution, traditional beauty specialty and mass outlets are struggling to maintain the excitement in the in store shopping experience."

Mayo emphasizes the importance of using consumer insights to brands' advantage, adding, "Brands must really wrestle with these emerging dynamics in how consumers shop. The expectation is to meet customers where they are, which means widespread distribution availability, a consistent innovation pipeline to complement discovery, and relationships with the ever important influencer community who has become so important to marketing brands."



Yarden Horwitz, co-founder of Spate

15. Korean/K-Beauty

Yarden Horwitz, co-founder of Spate, says, "K Beauty continues to be a driving force of innovation in the U.S. market, with a constant stream of popular Korean trends —i.e., TikTok-viral TirTir cushion foundation and the growing interest in Korean sunscreen on Google Search—reinforcing its influence. Viral ingredient innovations, such as snail mucin in products like COSRX and heartleaf in Anua's line, are also captivating consumers and fueling the K-beauty wave. This ongoing momentum across platforms reflects the U.S. consumer's strong affinity for K-beauty, keeping it at the forefront of beauty trends." ■

L to R: images courtesy of NielsenIQ; Spate



6 Top Makeup Growth Sectors for 2025

A close read of recent consumer data reveals areas of opportunity to tap growth in the color cosmetic sector.



While makeup remains the largest category in the prestige market, its sales grew 5% in the first half of 2024, slower than the other categories tracked in the Circana report[a]. At the same time, a September 2024 Spate report[b] notes that, between August 2021 and May 2024, makeup Google searches and TikTok content have dropped by 7.7%. Yet, while overall growth is slow, several key segments are expanding—notably lip and cheek products, setting sprays, and other select categories. At the same time, emerging trends, including hybrid/multifunctional products, new gestures enabled by packaging, clean formulations and more are opening new avenues for growth. Here's our full breakdown, encompassing market dynamics, recent innovations from turnkey and contract manufacturers, and packaging experts. Let's get started.

1 The Lip Boom Cannot Be Stopped

U.S. prestige lip segment sales grew in the double-digits in the first half of 2024, led by balms and oils, per Circana. Furthermore, lip gloss and liner were top sales gainers in the mass sector. This lip makeup boom is not a new phenomenon, carrying over from 2023.

In fact, a September 2024 Spate report shows that, between August 2021 and May 2024, top-growing products by Google search volume and TikTok content included lip stains, liners and tints.

That said, not everything is expanding in the lip space. Spate has flagged key decliners, including lipstick, gloss and plumping products.

Disrupting Lip Makeup: New Formulas, Gestures & Packaging

To fuel the next wave of lip makeup innovation, a range of suppliers and manufacturers have introduced new formulas and packaging components to introduce newness to a saturated sector.

For instance, Croda Beauty recently displayed its Pomegranate Glossy Lip Oil at MakeUp in New York. Inspired by the "slugging" skin care trend, the formulation creates an occlusive layer on the skin, per Croda, enhancing moisturization and leading to plumper skin.

Elsewhere, Cosmopak's Turnkey Lip Jello is a balm designed for convenient, effective lip care. The formulation is compliant with retailer clean requirements and features plumping and moisturizing shea butter and nourishing argan, macadamia and babassu oil, as well as squalane for soft, healthy lips.

Meanwhile, manufacturer MPlus Cosmetics' Vibrant Flame stylo lipstick comprises an ultra-creamy, Credo- and Sephora-compliant formula that offers a pop of color.

[a]www.circana.com/intelligence/blog/2024/the-skinification-of-everything/
[b]https://www.spate.nyc/subscribe

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While overall makeup growth is slow, several key segments are growing—notably lip and cheek products, setting sprays, and other select categories.

Image by LIGHTFIELD STUDIOS at Adobe Stock

Key ingredients include polybutene, tribehenin and a mix of synthetic waxes for a smooth, even application, while emollients add softness and luminosity, per the company. The lipstick also includes antioxidants like tocopheryl acetate and nourishing mango seed butter to prevent skin aging and dryness.

Vibrant Flame also comprises *Portulaca pilosa* extract and palmitoyl tripeptide-38 to plump the lips and boost volume, hydration and softness, according to MPlus.

MPlus' Play Intense lipstick, meanwhile, imparts a shiny-velvet finish and medium-high coverage via the creation of a wraparound film on the lips. The formulation comprises volume-boosting tocopheryl acetate, a hyaluronic acid-stimulating tripeptide complex and a ceramide complex to form a restorative barrier on the lips. The Play Intense lipstick is Sephora Clean and Credo-compliant.

Finally, MPlus' Pop & Play Soft lip crayon offers a velvety matte finish and keeps lips hydrated all day. Key ingredients include synthetic wax and microcrystalline wax to support effortless application and instant color payoff, as well as vinyl dimethicone/methicone silsesquioxane crosspolymer for a silky texture and soft-focus effect. Like MPlus' other lip products, the formulation is Credo-compliant and Sephora Clean.

On the packaging front, ICONS|ICS's flushfit Chubby Bottle features a soft and plump dome-shaped brush for lip, eye or liquid blush formulations. The design comprises a 3.5 ml fill size and PETG bottle, cap and stem.

ICONS|ICS's Lip Wand Packaging with Hybrid Applicator, meanwhile, comprises a hybrid TPEE and stainless-steel applicator. Designed for lip oils, tints, glosses or hybrid formulations, the pack is available in a 2.5 ml fill size.

The company's Wand Packaging with Paddle Tip Applicator, on the other hand, is designed for lip, face and eye formulations and includes a PET bottle, PCTG cap and flexible PBT spatula applicator with a slanted scoop design on two sides. The pack is available in a 2.5 ml fill size and with a variety of standard doe foot applicators.



Cosmopak's Turnkey Lip Jello is a balm designed for convenient, effective lip care.



Manufacturer MPlus Cosmetics' Vibrant Flame stylo lipstick comprises an ultra-creamy, Credo- and Sephora-compliant formula that offers a pop of color. The lipstick is pictured here alongside other formulations that comprise MPlus' Chakra Glow collection.

Quadpack, meanwhile, offers a range of new applicators that can be used for lip makeup and skin care.

"The classic flocked applicators are evolving," says Quadpack category specialist Mateia Crippa. "Among our collection of applicators, brands will discover new designs that add value to the formula and boost the consumer experience. We have original shapes inspired by nature. We also have metal designs that offer a cold-touch effect. They all add a touch of creativity to formula application."

From top: images courtesy of Cosmopak; MPlus



MPlus' Pop & Play Soft lip crayon offers a velvety matte finish and keeps lips hydrated all day. The crayons are pictured here, along with other formulations from the contract manufacturers' Pop & Play collection.



ICONS|ICS's flushfit Chubby Bottle features a soft and plump dome-shaped brush for lip, eye or liquid blush formulations.



ICONS|ICS's Lip Wand Packaging with Hybrid Applicator comprises a hybrid TPEE and stainless-steel applicator.



ICONS|ICS' Wand Packaging with Paddle Tip Applicator is designed for lip, face and eye formulations and includes a PET bottle, PCTG cap and flexible PBT spatula applicator with slanted scoop design on two sides.

The new Quadpack offerings comprise a mix-and-match system for dip-in solutions, including bottle and applicator options. The flocked applicators matched with Gala Lip Gloss, for instance, include the Quadzone rigid applicator with precise tip designed for defined lip lines, while the Crush applicator is ideal for lip gloss, offering a spoon shape with a double-sided reservoir for creating a heavy coat. The concave Ace applicator is designed for precision and flexibility, depositing a veil of opaque color, while the Dicot is fashioned for low-viscosity lip gloss and lip oils, allowing product to be squeezed out from the reservoir without spilling. The Gala Lip Gloss bottle is also compatible the Sorbet Kiss applicator for the lips and cheeks, featuring a high-volume reservoir that transfers low-viscosity formulas without dripping, per Quadpack.

Quadpack's Skin-Up bottle, meanwhile, features a leaf-shaped applicator (Centered) for high-and low-viscosity lip formulations, as well as the 360 facial applicator with a flexible, elliptical neck and curved edge, and Sorbet Touch for the lips and face, offering drip-free loading for

From top, L to R: images courtesy of MPlus; ICONS|ICS

low-viscosity foundations and blushes (see Cheeks: Blushes & Stains Rule). The Kimono applicator option, on the other hand, is designed for foundation or concealer, featuring a rounded tip for blending.

On the sustainability front, Axilone and Verescence have co-developed turnkey packaging combining glass and aluminum for liquid makeup formulas, including lipsticks, lip oils and glosses, as well as liquid eyeshadows or blushes. Featuring a capacity of 7.5 ml, the packaging comprises a Verescence lightweight glass Kali bottle incorporating 20% PCR and an Axilone Pure Metal cap composed of aluminum.

The pack is intended to deliver a luxury feel and allows brands to customize the design, including the bottle, stem, applicator and aluminum cap. Bottle deco options include lacquering, hot stamping, silk-screening and gluing of labels, while the cap can be precisely shaped to create distinctive reliefs and patterns. The stem can also be engraved

"The Kali bottle and its Pure Metal cap were designed for brands looking to project a high-end and eco-responsible image for their makeup products," says Bérangère Raguenet, marketing and communication director at Verescence. "The sensory experience provided by glass and aluminum is unparalleled. The cold touch and brilliance of these two materials enhance the perceived quality of the product among consumers."

"As a packaging solutions provider, it is our role to offer solutions that meet market trends and support brands in optimizing the life cycle of their packaging," says Lucie Ray-Lalanne, marketing and communication director at Axilone. "Offering a combined glass/aluminum option is highly relevant for a more sustainable luxury. We are currently working to strengthen the eco-designed dimension of this recyclable full-aluminum concept, by integrating PCR recycled aluminum."

APC Packaging is bringing monomaterial designs to the lip sector via its new color cosmetic collection, comprising either 100% PET or PP materials. Each product in this collection can be designed with up to 50% PCR (PP 5 g Stick is capable of 100% PCR, per the company).

The collection includes a fully PET 3.5 g Lip Stick and 100% PP 1.8 g Lip Stick, as well as a 100% PET 5.2 ml Lip Balm. The company's collection also includes a 100% PP 5 g Stick (bottom fill), 100% PP 1.3 g Twist Pen and 100% PP 0.06 g Twist Pen.



Quadpack's Skin-Up bottle features a leaf-shaped applicator (Centered) for high-and low-viscosity lip formulations.



Axilone and Verescence have co-developed Kali turnkey packaging combining glass and aluminum for liquid makeup formulas, including lipsticks, lip oils and glosses, as well as liquid eyeshadows or blushes.



APC Packaging is bringing monomaterial designs to the lip sector via its new color cosmetic collection, comprising either 100% PET or PP materials.

2 Cheeks: Blushes & Stains Rule

Blushes and other cheek products have been inescapable, led by launches by buzzy brands.

Over the last three years, per Spate, top growing makeup categories on Google search and TikTok included blush, including jelly and liquid blushes; pink blush; and cheek stains.

Spate notes, "Consumers are particularly focused on product

From top, L to R: images courtesy of Quadpack; Axilone x Verescence; APC Packaging

formats and suitability for various skin types and undertones, especially for mature skin."

Future innovation in blushes could likely benefit from hybrid concepts. For instance, during MakeUp in New York in September 2024, Croda Beauty introduced a range of concept formulas, including the Glow for It Dewy Bouncy Blush that delivers a bright pink color while illuminating and revitalizing the skin for an energized look.

3 Interest in Multifunctional Hybrids Remains Strong

Concurring with Croda's hybrid blush concept, Spate's report has catalogued growing interest from consumers in multifunctional makeup for the lips and face.

At the same time, Circana points out that, in 2023, "over half of makeup users were looking for products that function as both makeup and skin care, an increase of 6% versus prior year."

A September 2024 Circana report points out that "more than 50% of U.S. consumers seek products that combine makeup and skin care in one, with just over 60% of Gen Z and millennials aligning with this sentiment."

Ingredient firms are ramping up innovation to capture consumers' interest in hybrids.

Notably, Givaudan Active Beauty's new [N.A.S.] Vibrant Collection comprises a series of 100% natural origin active extracts that provide both performance and skin benefits, in addition to color stability and longevity.

"There is a growing need for ingredients specifically designed for hybrid make-up formulas—ingredients that can easily be incorporated into makeup," says Fabrice Lefevre, innovation and marketing director. "By focusing efforts into the sourcing and supply chain of natural ingredients, Givaudan Active Beauty has identified four natural raw materials known for their strong antioxidant potential that also offer proven benefits for the skin while sustaining makeup performance."

Crafted through green fractionation, the [N.A.S.] Vibrant Collection comprises five natural extracts in powder form (INCIs: not provided) that are highly concentrated in bioactive compounds, offering strong antioxidant properties and additional skin benefits, per the company. These include:

- [N.A.S.] Curcuma 7409 (INCI: *Curcuma longa* (turmeric) root extract (and) kaolin), a soothing rhizome extract
- [N.A.S.] Gardenia 2168 (INCI: hydrolyzed gardenia Florida extract (and) maltodextrin (and) kaolin), an anti-aging fruit extract



Givaudan Active Beauty's new [N.A.S.] Vibrant Collection comprises a series of 100% natural origin active extracts that provide both performance and skin benefits, in addition to color stability and longevity.



Anisa's Glider Collection revival includes a brush head for the application of hybrid and liquid formulas.

- [N.A.S.] Spirulina 2183 (INCI: *Spirulina platensis* extract (and) hydrolyzed corn starch (and) kaolin), a brightening algae extract
- [N.A.S.] Radish 1805 (INCI: *Raphanus sativus* (radish) root extract (and) citric acid (and) montmorillonite (and) maltodextrin), a skin protection extract
- [N.A.S.] Radish 2364 (INCI: *Raphanus sativus* (radish) root extract (and) citric acid (and) montmorillonite (and) maltodextrin), an anti-glycation extract

Givaudan's processing is said to ensure the stability of the composition of the extracts and bioactive compounds, preserving their organoleptic properties and appearance. The oil-dispersible powders thus deliver their biological efficacy in makeup without compromising color performance, intensity or stability, per the company.

Hybrid formulations are also reshaping the manufacture of beauty tools.

Notably, Anisa's Glider Collection revival includes a brush head for the application of hybrid and liquid formulas. Inspired by the iconic lipstick shape, the ergonomic concave design reportedly ensures smoother, more even product application, while the rolled ferrule offers highly controlled application.

From top: images courtesy of Anisa International; Givaudan

The design is optimal for hybrid formulas across liquids, creams and sticks, as well as moisturizers, primers and sculpting products.

Variants in the collection include the All-Over Complexion, Foundation, Detail Complexion, Eye, Detail Eye and Precision Eye & Lip.

4 Eyes: Unique, Convenient Formats Lead

It's undeniable that the eye makeup category has been challenged, with Spate noting declining interest over the last three years in eyelid, eyebrow, eyelash, mascara, eyeliner and eyeshadow products.

Yet some formats are on the rise in popularity, including stick foundations and stick eye shadows.

Bringing Newness to Eye Makeup: Formulas & Packaging

To breathe new life into the eye makeup sector, a range of suppliers have launched innovations in packaging and formulations.

For instance, Cosmopak has reintroduced a selection of mascaras from its 2021 Let's Play collection. The eight clean mascaras are designed to properly match formulas, wands (flexible molded and wired brushes) and wipers for desired effects, including lengthening, curling, defining and volumizing. Packaging options include refillables, PCR, metal, bio-resins and glass. Because Cosmopak has done the groundwork, clients can reportedly bring mascara products quickly to market. That said, the company can customize mascaras, but on a longer development timeline.

Elsewhere, MPlus Cosmetics recently developed the Elevation Mascara, which features a mix of film formers and fixatives to offer strong adhesion and rub-off resistance. Volume and definition can be achieved with a blend of high- and low-melting-point waxes. Key ingredients include shea butter and panthenol, as well as peptides and hyaluronic acid for stronger, fuller lashes.



Cosmopak has reintroduced a selection of mascaras from its 2021 Let's Play collection. The eight clean mascaras are designed to properly match formulas, wands (flexible molded and wired brushes) and wipers for desired effects, including lengthening, curling, defining and volumizing.



HCP's Fantasy Eyes collection of aluminum mascara packs for lash and brow formulations is designed to offer a luxury look and feel.

MPlus' creamy Play & Stay mascara offers lengthening and volumizing benefits for stand-out lashes. Featuring a whipped texture, key ingredients include *Euphorbia cerifera cera* from candelilla shrubs, as well as vegetable oil, *Oryza sativa* bran oil and wax, *Rhus succedanea* fruit wax and *Helianthus annuus* seed wax, as well as moisturizing panthenol, thickening myristoyl pentapeptide-17 and lengthening biotinoyl tripeptide-1.

On the packaging front, HCP's Fantasy Eyes collection of aluminum mascara packs for lash and brow formulations is designed to offer a luxury look and feel. The packs can have weight added to enhance a sense of value in SKUs. Deco options include embossing, mirror finishes and more. The packs can be paired with fiber or precision-molded brushes.

Brush options for the Fantasy Eyes collection include volumizing Sirene

From top: images courtesy of Cosmopak; HCP

Twist for curl and length, which can be paired with the 13 mm Magnum Chubby Mascara pack. The Quick Booster brush for quick and efficient formula application, meanwhile, can be paired with the 13 mm Magnum Square Mascara.

HCP also offers the definition-boosting La Fatale, paired with the 13 mm Magnum Full Size Mascara, as well as the lengthening Comb & Stretch, also with the 13 mm Magnum Full Size Mascara.

For brows, HCP offers smaller brushes, including the Tailored Brow and Keyhole, which can be paired with either the 13 mm Magnum Mid-Size Mascara or 13 mm Magnum Promo Mascara.

Beyond mascara, MPlus Cosmetics' Eyelume Duo functions as a highlighter and eyeshadow, tapping into shoppers' desires for unique, multifunctional formats. The duo's anhydrous gel formula features a mousse-like, soft texture that glides smoothly and delivers long-lasting wear, per the manufacturer.

The Eyelume Duo offers a hydrating finish and comprises a crosspolymer that delivers a soft-focus and matte effect while smoothing and blurring imperfections and wrinkles. Its silicone-coated pearls reportedly support skin adhesion, product longevity and a soft, talc-like touch. The MPlus formulation also features hydrogenated polycyclopentadien for water resistance and tocopheryl acetate for antioxidant defense against premature aging.

MPlus' Play Matte Shadow reportedly offers rich, velvety color. The formulation comprises volatile silicone oils that help the product dry quickly, ensuring a smooth application without smudging, as well as a film-forming agent for lasting hold and silicone powder for glide and creaminess.

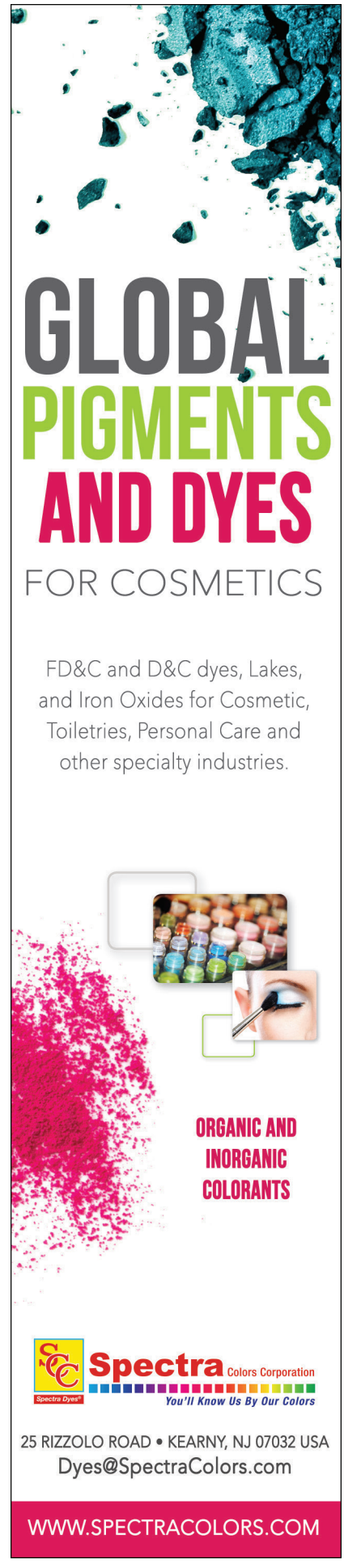
Elsewhere, ICONS|ICS' family of Bell-shaped Pot with Push-button Applicators is designed for powder or liquid formulations and features a travel-ready 1.5 ml fill size. The mess-free push-button design allows the brushes to pick up optimal levels of product from the sponge-lined pot or pot with powder sifter. Collectively, the applicators can be used for liquid, cream and powder eye and brow formulations. Brush options include a square brush or a teardrop-shaped brush for precise application.

On the brow front, meanwhile, MPlus' Color Lift Wax styles and colors



ICONS|ICS' family of Bell-shaped Pot with Push-button Applicators is designed for powder or liquid formulations and features a travel-ready 1.5 ml fill size.

Image courtesy of ICONS|ICS



brows. The formulation includes moisturizing humectants, water-soluble pigments, and biotinoil tripeptide-1 to strengthen and thicken brow hairs by promoting the proliferation of keratinocytes in the hair follicle bulb.

Its Play Glitz Brow wax, meanwhile, provides a glowy effect. The formulation includes moisturizing humectants that help retain moisture and biotinoil tripeptide-1 to strengthen and thicken brow hairs by promoting the proliferation of keratinocytes in the hair follicle bulb.

5 Facial Makeup: a Story of Disruption

Among top makeup decliners identified by Spate over the last three years were face paint, contouring, highlighter, and foundation and base products, pointing to a shakeup in the face category.

A September 2024 Circana analysis highlights what might be behind some of the shifts: "As more beauty products with skin care benefits and ingredients began hitting the shelves, foundation was moved aside for tinted moisturizer; powder formulations gave way to creams, liquids, sticks and balms; and, perhaps the ultimate mash-up, serum foundations arrived in the aisles."

Many of these products tapped skin care classics such as "niacinamide, hyaluronic acid and squalane," per the analysis.

This may explain why, despite challenges in many other product format categories, liquid bronzers have grown well between 2021 and 2024.

Facial Makeup Innovation Resources: Packaging & Formulations

Powder formulas are among the formats targeted by contract manufacturers and packaging firms, all of which seek to reinvent the format with convenience and additional functionality.

For instance, ICONS|ICS' EcoRefill Powder Pot (26 ml) is constructed with monomaterial PP (and is thus



ICONS|ICS' EcoRefill Powder Pot (26 ml) is constructed with monomaterial PP (and is thus curbside recyclable) and offers a smooth, mess-free refill experience, per the manufacturer.



HCP is tackling powder formulations with its Ringo Loose Powder Pot, which was designed for loose and mineral/setting powders.

From top: images courtesy of ICONS|ICS; HCP

curbside recyclable) and offers a smooth, mess-free refill experience, per the manufacturer. Its bottom-fill design features a Twist Lock base and other design elements to prevent powder migration.

HCP is also tackling powder formulations with its Ringo Loose Powder Pot, which was designed for loose and mineral/setting powders. Composed of non-styrenic PP and PET materials, the pot features a sifter with a "holed" construction and a half-moon tab that secures the powder puff in place. Users tap the powder into the lid and use the puff or a large brush to apply product. The pot also features the company's Ringo construction, which allows the inner pod to pop out from the bottom, simplifying the refilling process. Brands can apply a range of deco customization to the Ringo Loose Powder Pot, including transparent and tinted finishes, as well as branding on the top surface of the cap or side of the outer jar.

Elsewhere, MPlus has taken on the concealer format with the fluid, skin-care-inspired Brightening Concealer, which provides medium coverage and adds a luminous glow to the skin. Key ingredients include emollients that offer a talc-like, lightweight feel, as well as film-forming agents for long-lasting wear with enhanced adherence. The formula features 83% natural origin content (ISO16128) and is Credo and Sephora Clean.

MPlus also takes on shoppers' demands for unique formats with its Play Erase stick concealer, which features *Rosa centifolia* flower wax for structure and a rose scent, bis-diglyceryl polyacyladipate-2 for a glossy, long-lasting finish, a blend of synthetic and microcrystalline waxes for smooth application, skin-softening emollients, and barium sulfate and mica for a velvety, soft-focus effect. It also offers calming, antioxidant benefits via its *Centaurea cyanus callus* lysate extract content.

On the foundation front, MPlus' lightweight Armony Foundation offers a demi-matte finish while absorbing excess sebum. Following the skinification trend, the formula features ascorbyl palmitate and tocopheryl acetate, collagen-boosting *Acmella oleracea* extract, and brightening *Evodia rutaecarpa* fruit extract.

MPlus also offers a stick foundation format, featuring high-melting point waxes and silica texturizers, moisturizing jasmine, peony and rose, as well as materials that minimize the appearance of wrinkles, deliver firmness and elasticity, and defend against aggressors such as UV, IR and blue light.

Beyond packaging and concept formulations, Anisa International has launched a range of applicators to deliver optimal product experiences.

The company's Feathering Collection features a deep ferrule design that includes a larger, denser brush head that delivers light and buildable coverage, enhanced product pickup and more control.

The design is ideal for dusting powder and features the following variants: All-Over Complexion, Bronzer, Detail Cheek, Highlight, Eye and Detail Eye.

Anisa's Liquid Touch Collection Expansion, meanwhile, has added new fiber options as well as new variants for eye makeup. The "enhanced" fibers support blending and application of creams, liquids and some powders, per the company.

6 Setting Sprays and Primers in the Spotlight

The top growers identified in the Spate report included setting sprays, fixing sprays, setting sprays with UV defense claims, finishing sprays and face primers. The dominance of sprays highlights a desire for flexible and convenient solutions.

Among top brands consumers have searched via Google over the 12 months between early October 2023 and early October 2024 include Milani (particularly its Make It Dewy Setting Spray), L'Oreal Paris (particularly its Infallible 3-Second Setting Spray Mist), E.L.F. (particularly its Power Grip Dewy Setting Spray) and Morphe Cosmetics.



Anisa's Feathering Collection features a deep ferrule design that includes a larger, denser brush head that delivers light and buildable coverage, enhanced product pickup and more control.

Other standouts include One/Size's Wicked collaboration glitter setting spray (searches also include queries for founder Patrick Starrr) and NYX Professional Makeup's Dewy Setting Spray and Marshmellow Matte Setting Spray.

E.L.F. is also a top player in the SPF setting spray space due to its Suntouchable All Set For Sun SPF 45 SKU, while Coola's Makeup Setting Spray Sunscreen is also a significant search presence.

Makeup 2025: What's Next

By finding new innovation opportunities in growth categories and doubling down on hybrid multifunctional formulations that offer enhanced claims (ex: anti-aging, hydrating, etc.), brands can expand market share in beauty's biggest, but most challenged sector. ■

Image courtesy of Anisa International

Lobie's founder and CEO, Anastasia MacKay, is frequently featured on the brand's Instagram channel, showcasing to the online community each step of Lobie's development and brand journey, further fostering trust and loyalty within the consumer market.

Image courtesy of Lobie

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THE SOCIAL MEDIA SECRETS OF GEN Z'S FAVORITE HAIR CARE BRANDS

Hair care brands that cater to Gen Z have launched into the market with great success by turning their social media strategy into both an art and a science.

BY LISA DOYLE

Based on consumer behavior from recent years, it's clear that marketing anything to Gen Z comes with a social-first strategy, and that's especially apparent within the hair care sector. From TikTok Shop for tools and products to Instagram Live for styling tutorials, social media can lead to a gold mine for e-commerce.

According to a recent report from Circana, hair care[a] is the only category with most of its sales coming from e-commerce, experiencing double-digit growth. Circana reports the two fastest-growing areas of the category are styling and treatments—two areas that perform well on social media platforms and appeal to Gen Z audiences.

Hair care brands that cater to Gen Z have launched into the market with great success by turning their social media strategy into both an art and a science: tailoring their content for each platform, staying authentic to their brand story and always remaining on top of market trends.

Perfecting Each Platform

According to the hair care brands we spoke to, recognizing how your fanbase uses each social media platform is key, as well as tailoring the content you create for each platform accordingly.

Good Hair Day's (GHD) chief marketing officer, Montse Passolas, says, "The importance is to understand how content needs to be deliberately created for the way the platform consumes content and the viewer interacts with it. One size does not fit all anymore; there is no point in repurposing the same content across all platforms. It needs to be bespoke to try to guarantee effectiveness."

The two most important platforms to focus on when marketing to Gen Z consumers are, of course, Instagram and TikTok.

Jamiee Lupton, founder of Being, a new Gen Z-targeted hair care brand, explains, "We use Being's Instagram channel to educate consumers about our offering in an accessible, easily



"Since day one, Instagram has been Divi's top-performing platform," says Jen Hsiao, chief marketing officer, Divi.

[a]www.gcimagazine.com/brands-products/skin-care/news/22916897/2024s-global-beauty-sales-are-powered-by-an-ecommerce-social-selling-boom

Image courtesy of Divi

digestible way, collaborate with creators to tell our brand story through trusted voices, and offer snippets into behind-the-scenes brand moments to foster community and authenticity. Our TikTok content is less curated, and focused on highlighting a more off-the-cuff, creative side of our brand through trending challenges, tutorials and user-generated content."

Divi, a brand that focuses on bolstering scalp and hair health, also uses both platforms strategically in tandem.

"Since day one, Instagram has been Divi's top-performing platform, and it's where a large part of our community interactions, influencer partnerships, and major social moments currently take place," says Jen Hsiao, chief marketing officer, Divi. "We've seen significant gains not only in organic metrics, but we've also significantly scaled our influencer partnerships with a 200% increase in ROI year over year. We also see tremendous potential in TikTok, particularly in TikTok Shop. We've leaned into growing a very strong TikTok Shop affiliate program, and have been able to achieve triple-digit growth on our shop's GMV month over month."

Storytelling on Social

Social media presents unique opportunities for storytelling and interaction. Brands that maximize these opportunities for connection inevitably strengthen loyalty among consumers. One rising hair care brand, Lobie, utilizes both of these methods in its social media marketing strategy.

Lobie's founder and CEO, Anastasia MacKay, is frequently featured on the brand's Instagram channel, showcasing to the online community each step of Lobie's development and brand journey, further fostering trust and loyalty within the consumer market.

"Additionally," says MacKay, "we collaborate with influencers and



Good Hair Day's (GHD) chief marketing officer, Montse Passolas, says, "The importance is to understand how content needs to be deliberately created for the way the platform consumes content and the viewer interacts with it."

4 GEN Z HAIR BRAND SOCIAL MEDIA CAMPAIGNS: FIRST PERSON

1. Divi: Every Hair Story Is Individual

"In August, for National Hair Loss Awareness Month, we launched a campaign called "Every Hair Story is Individual," featuring nine members of our community–real customers who have used and loved Divi for years. These community members shared deeply personal stories about their hair journey and experience with hair thinning and hair loss. Their stories were launched on-site and social–and the reception has been tremendous with many people writing to express their appreciation for this compassionate approach to hair care, and resharing these touching stories with friends and family."

– Jen Hsiao, chief marketing officer, Divi

www.instagram.com/p/C-K6jj9hgDV/

2. Good Hair Day (GHD): Wow Moments

"One of our best performing pieces of content was a back of head transformation that had that wow moment! It clearly showed the styling technique right alongside the perfect finished result that everyone loves."

– Montse Passolas, chief marketing officer, GHD

www.tiktok.com/@ghdofficial.025/video/7392897941779795232

3. Lobie: Leveraging Reels

"Our most successful social media content piece to date has been the launch day Reels, where we took consumers behind the scenes at the factory where Lobie products are made. These Reels provided an authentic, inside look at the meticulous process behind our hair care line, showcasing the high-quality ingredients and dedication to excellence that define our brand. The transparency and personal touch resonated deeply with our audience, driving significant engagement, shares and positive feedback."

– Anastasia MacKay, founder and CEO, Lobie

www.instagram.com/reel/C2poa7zRrAw/

4. Being: Keeping it Simple

"Our most successful organic content piece to date is a product showcase video on TikTok, currently sitting at almost 1 million views. It encapsulates the approach we take to content on this platform specifically–it's very lo-fi, with minimal editing or production and set to a popular audio."

– Jamiee Lupton, founder, Being

www.tiktok.com/@beinghaircare/video/7387919803991772424

Image courtesy of Good Hair Day

experts who align with our brand values to amplify our message and reach a wider audience. This multifaceted approach allows us to connect with our followers on a deeper level, making them feel like an integral part of the Lobie family."

The Divi brand was founded by fashion and lifestyle influencer Dani Austin, who started the brand to destigmatize hair thinning after experiencing it herself.

"Social storytelling is intrinsic to our brand's DNA," says Hsiao. "There are many facets to the Divi brand that make it special and beloved–including the strong scientific efficacy of our products, the emotional resonance we have with our community, and the fun moments that bring levity and joy to the otherwise serious topic of scalp and hair health."

In August 2024, in honor of National Hair Loss Awareness Month, the brand launched a campaign called "Every Hair Story Is Individual," featuring nine customers who shared deeply personal stories of hair loss (see: Gen Z Hair Brand Social Media Campaigns: First Person for more).

Hsiao adds, "At Divi, our customers are the heart of our brand, and giving back to the Divi community is our top priority. We want our customers to feel special, and we want to create content that shows them they are not alone in their hair journey."

At GHD, user-generated content is paramount.

"Organically, we want to encourage our communities to tell our story through their eyes," says Passolas. "The power of user-generated content opens a multitude of ways of showcasing our brand through a wider group of people, all capturing their versions with their styles and making it relatable to their communities, more attainable and even attractive."

Agility & Adapting

In the quickly evolving social media landscape, a brand must ascertain which trends are worth incorporating into the strategy. Often, the determining factor is whether a trend aligns best with the heart of your brand.

At Being, Lupton says, "Our team's ability to easily—and immediately—jump onto trends stems from the deep knowledge we have of our audience, owed to the fact we innately understand the target demographic of our consumer. Our own Gen Z team is chronically online and possesses an instinctive understanding of the most relevant trends for our brand, as well as the ways we can adapt the trend or trending audience and align it with our brand/product."

"We actively monitor emerging trends," says Hsiao, "utilizing a mix of data analytics and social listening to identify what's resonating with our audience. From there, we quickly

(Continued on Page 28)

HAIR CARE IS DRIVEN BY PREMIUMIZATION IN 2024: SALES DATA



Hair product sales in the prestige market increased by 10%, based on dollars, in the first half of 2024, per Circana.

Hair product sales in the prestige market increased by 10%, based on dollars, in the first half of 2024, per Circana. Notably, hair products with average prices above $30 grew 3x the rate of lower priced items and now account for 25% of unit sales for the hair care category. That's a 10% gain of market share in just the last three years.

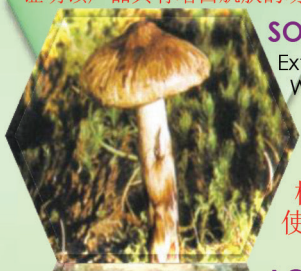
- Mass hair care also experienced the largest growth compared to other categories tracked in a recent Circana report.
- Hair care is also the only category with the majority of its sales coming from ecommerce, per Circana. Sales in that channel are experiencing double-digit growth.
- Meanwhile, styling and treatments were the fastest-growing areas of the category. In 2023, Circana reported double-digit growth in most hair styling segments.

Image by Karolina Kaboompics at Pexels

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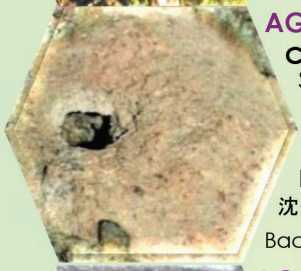
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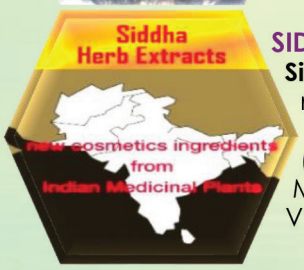
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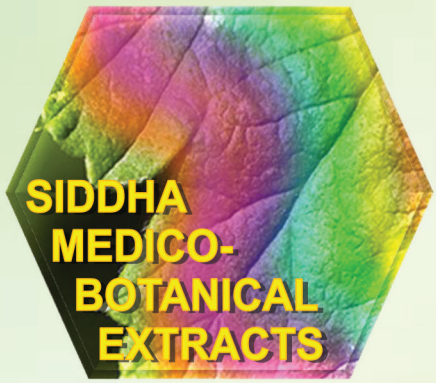
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Lonicera Japonica (Honeysuckle) Flower Extract
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Green 绿 Red Deep 深红 Ultra Sky Blue 天蓝
White Pearlescent 珍珠白 Red Light 浅红
Dark Ultra Brilliant Yellow 深黄 Yellow Light 浅黄
Dark Black 黑

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

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

OIL SOLUBLE POWDER 油溶性粉末
Brown 棕 Yellow 黄 Green 绿 Red 红
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INSIGHTS INTO ACTION: NEW INGREDIENTS & PRODUCTS

To kickstart brand innovation, a range of suppliers and contract manufacturers have launched resources for product development.

Hair Gel Stick

Lady Burd's new Hair Gel Stick adds instant hold to any hair style. The format is ideal for addressing flyaways and achieving a slicked back bun look.



Enhancing Hair Care Fragrance

Givaudan's Bloomful Splash and Bloom Drops are designed to enhance the olfactory perception of hair products at the ingredient and formulation level.

Bloomful Splash is designed to offer consumers a "mesmerizing journey," amplifying and boosting the bloom outcome to intensify the fragrance, elevating the overall shower routine.

Bloom Drops are a collection of six perfumery accords infused with Givaudan's signature captives to deliver a superior bloom impact.

The two solutions are part of Givaudan's Bloomful platform, said to define and measure the scent bloom of fragrances in various applications both when the fragrance becomes instantly noticeable to the wearer's olfactory senses and when the fragrance fills the surrounding space.

Philippe Poirier, head of global fragrance technology, says, "Bloomful Splash, a patent-pending innovation, represents a significant advancement in fragrance technology. It is the result of developing a 'bloom' olfactory effect at both the ingredient level with Bloom drops and composition levels with Bloomful Splash, combined with our expertise in optimizing creation rules for optimal performance."

Targeting Collagen XVII to Prevent Hair Loss and Graying

Provital's Kerascalp preserves and increases the expression of collagen XVII, the deficiency of which can lead to hair loss and hair graying via incomplete melanocyte stem cell maintenance.

Silvia Benito, Provital SA's science communication manager, notes, "Hair loss and premature hair graying are related primarily through the processes of aging, oxidative stress and stem cell dynamics."

She adds, "Damage or depletion of … stem cells can lead to both hair loss and premature graying." In addition, she says, "Excessive ROS can damage melanocyte stem cells, leading to premature graying, and can also damage hair follicle stem cells, contributing to hair loss. Environmental factors like UV radiation and pollution can exacerbate oxidative stress."

Genetic factors and cellular senescence (melanocyte stem cells and hair follicle stem cells) also play a role, as do hormonal changes involving androgens, which can cause hair androgenetic alopecia and may influence hair graying.

Boosting Hair Shine

Seppic's Xylishine C (INCI: (INCI: xylitylglucoside, anhydroxylitol, maltitol, xylitol, Pelvetia eanaliculata extract) taps into the skinification of hair and scalp care by repairing the scalp and hair cuticles to boost shine, enhance curl definition and control volume.

Xylishine C works by smoothing cuticles and repairing the surface appearance of damaged cuticles while restoring hair and water interactions. In this way it can revive hair impacted by bleaching, for instance.

The Xylishine C natural active is derived from a patented complex of sugar with moisturizing effects and Pelvetia canaliculate harvested in Brittany, France, which offers resistance to dehydration.

The technology is compliant with Chinese IECIC and IECSC regulations, per Seppic, and is COSMOS and Natrue approved with a naturalness rating of 99.7% according to ISO 16128.

Rejuvenating Hair to Combat Loss

"Some years ago, the mechanisms to fight hair loss were very much based on the hormones," says Anna Balaguer Provital SA's global trends manager. "Still, we can find this kind of products on the market because, of course, hormones play a key role in hair loss. But now there are many other great alternatives with different mechanisms that we can claim are more inclusive, match today's trends, and are genderless. A clear example is our awesome Baicapil, one of our best sellers, which works at a cellular level with a rejuvenating and energizing effect, and all natural because it is a combination of three plants, something that consumers absolutely love."

Baicapil is a plant-based ingredient used in hair care products to stimulate hair growth, increase hair density and reduce hair loss. It functions by addressing the various challenges facing aging hair.

Image courtesy of Lady Burd

"The connection between cellular senescence and hair loss is rooted in the biology of hair follicles and the aging process," says Silvia Benito, Provital SA's science communication manager. "Cellular senescence refers to a state where cells cease to divide and function properly, often in response to stress or damage. These senescent cells accumulate over time and can contribute to various age-related conditions, including hair loss."

Benito explains that as hair follicles age, they suffer from an "accumulation of senescent cells." She notes, "These cells can affect the hair growth cycle, leading to shorter anagen phases and longer telogen phases, resulting in thinning hair and hair loss."

In addition, Benito says, "Senescent cells secrete pro-inflammatory cytokines, growth factors and proteases, collectively known as the senescence-associated secretory phenotype (SASP). This chronic inflammatory environment can damage surrounding tissues, including hair follicles, exacerbating hair loss."

Cellular senescence can also deplete regenerative stem cell reservoirs or impair their function, Benito explains, "reducing the follicle's ability to produce new hair and leading to hair thinning and loss."

Other stressors can include UV radiation exposure and oxidative stress. "These stressors can induce DNA damage and other cellular stresses that push cells into senescence," says Benito, "thereby contributing to hair loss."

Telomere shortening is yet another concern for aging hair because critically short telomeres can cause cells to enter senescence. "Hair follicle cells with short telomeres are more likely to become senescent," Benito says, "which can impair hair growth and maintenance."

Microalgae Solution for Hair Graying and Loss

Algaktiv's Densidyl combats hair loss and graying via the benefits of phycocyanin (Spirulina maxima) and xanthophylls (Chlorella emersonii), which strengthen hair follicles from the inside out. The ingredient also reduces oxidative stress, balances cortisol and reportedly boosts melatonin activity to promote hair growth and restore natural pigmentation.



A new generation of ingredients is combatting hair thinning, loss and graying through novel means.

Per Algaktiv, Densidyl increases hair density by more than 11% in 5 months, while protecting against environmental and emotional stressors. The supplier also claims that the technology outperforms market standards such as Minoxidil and EGF, delivering 4x faster results.

Defending the Hair from Oxidative Stress

Provital's Keradeep ingredient is designed to protect damaged hair by prevents the oxidation and carbonylation of hair proteins in both cuticle and cortex. According to Natalia Robles Benito, product manager, Provital S.A, this activity can also prevent future damage by mitigating the effects of oxidative stress on hair proteins.

The ingredient taps the antioxidant effect of Pinus pinaster bark to act on the hair at the molecular level.

Per Benito, under stressed conditions (30% H2O2 for 45 minutes), Keradeep not only prevents protein carbonylation of the cuticle, but also prevents breakage of disulfide bonds the appearance of cysteic acid.

Under the same conditions, the ingredient technology protects against both protein carbonylation and maintains the positional structure of keratin.

When subjected to 95oC for 60 minutes, Keradeep reportedly prevents a high level of protein carbonylation of the cuticle. ■

Image by Joel Santos at Pexels





Jamiee Lupton, founder of Being, a new Gen Z-targeted hair care brand, explains, "We use Being's Instagram channel to educate consumers about our offering in an accessible, easily digestible way, collaborate with creators to tell our brand story through trusted voices, and offer snippets into behind-the-scenes brand moments to foster community and authenticity."

(Continued from Page 23)

ideate and implement strategies that align with these trends, ensuring our content and campaigns are both timely and relevant. This approach allows us to engage with our audience authentically, keeping Divi at the forefront of the conversation in the scalp and hair health space."

Working closely with affiliated stylists has helped GHD's social team remain at the forefront of social trends.

"The teams around the world and particularly in the United States are amazing at transforming trends into consumable pieces of content," says Passolas. "We are locally set up with digital studios and a pool of talented hair stylists and content creators, that work in tandem with our digital and social media teams to identify trending terms or social calendar events that drive search, so we can maintain our brand relevant to the 'always-on' model that we live in today. Is it intense? Yes, but the teams are totally switched on and it has become part of the everyday marketing role. I am privileged to see how we have built a GHD model where the teams collaborate constructively around the world and exchange ideas and content." ■

Want more from this author?

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LISA DOYLE was formerly the associate editor of *Global Cosmetic Industry* and is a freelance writer in the Chicago area. Her work has also appeared in *Skin Inc.*, *Salon Today*, *Modern Salon*, *Master Barber* and *Writer's Digest.*

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2025 Beauty Ingredient Trend Preview: What's Next?

From silk-derived biotech to microbiome sexual wellness and beyond, new ingredients point to future innovation opportunities.



Kojic acid has become increasingly popular, as seen in Peace Out Skincare's Dark Spots Serum, featuring kojic acid alongside 3% tranexamic acid and alpha-arbutin.

Image courtesy of Peace Out Skincare

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This past year in beauty has been defined by emerging technologies targeting skin longevity, exosomal ingredients and an escalation in biotechnology innovation.

Looking ahead at 2025, a number of these trends and more will likely shape product innovation. Many of these are evolutions of existing or emerging ingredients and claims, pointing to a clear trajectory of growth. Highlights include:

- ***Minimalist beauty:*** formulations that reduce or eliminate elements such as water and conventional preservation, supported by multifunctional ingredients, in addition to products that do more, offering higher value to choosy shoppers
- ***Pro inspiration:*** ingredients that mimic professional treatments with less invasive solutions
- ***Microbiome opportunities:*** with rising interest in barrier strength and sensitive skin solutions, microbiome balance is increasingly a focus of product development
- ***Clean efficacy:*** safe, sustainable ingredients with proven effectiveness
- ***Biotech:*** lab-grown innovations that offer improved or even novel functions and claims
- ***Future-proofing beauty:*** technologies that expand claims from rejuvenation to prejuvenation, particularly for young consumers already concerned about the signs of aging

This is just a fraction of the themes we expect to see in the year to come (and beyond). Here, we offer a look at recent launches and challenges and the innovation opportunities they offer the beauty industry.

Kojic Acid's Boom Threatened by Regulations

Kojic acid, itself seen as a skin brightening alternative to hydroquinone, is facing restricted use levels (1%) in face and hand products sold the European Union and United Kingdom, effective April 2025.

The restrictions come amid a boom in popularity for the ingredient. In September 2024, Spate reported[a] that kojic acid's effectiveness in combating hyperpigmentation could make it "the next big hyperpigmentation-fighting trend."

The ingredient is reportedly searched alongside glycolic acid, mulberry extract (beloved for its low-irritation profile), arbutin and, of course, hydroquinone.

The rise of interest in kojic acid, paired with impending regulations, could open opportunities for materials such as soybean extract, niacinamide and vitamin C, as well as the other materials previously mentioned.

Among the key product formats appearing in Google searches over the last 12 months, per Google Trends, are bar soap (popularized by the Valtic brand), facial moisturizers and powders.

In addition to the ingredient searches flagged by Spate, turmeric is often paired with kojic acid searches, perhaps due to its association with brightening effects, in addition to its efficacy in addressing acne-prone skin and skin aging. Mucin, a generally popular ingredient from the K-beauty world, also appears in kojic acid searches.

Brands associated with kojic acid include Valtic, as previously mentioned, alongside Phor Essentials, which produces Turmeric Kojic Acid Exfoliating Cleansing Pads, and Koji White's Kojic Acid Skin Brightening Body Wash.

Meet the Next Generation of Peptides

Google searches for peptides hit an all time high in the autumn of 2024, driven by queries for brands such as CosRX, which manufactures a six-peptide serum, as well as The Ordinary's Multi-Peptide + HA Serum facial moisturizer, Rhode's peptide-driven lip and facial moisturizer products, and Maelove's Peptide Squad Collagen Renewal Serum.



Soluble fibroin, the basis for the two Evolved by Nature peptides discussed in this report, is a silk protein most often produced by insects, including moths.

[a]www.spate.nyc/beauty

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Interest in peptides has likely only just begun, with innovation in the space set to advance with the launch of new biotech materials.

For instance, Evolved by Nature's Activated Silk 33B-α (INCI: soluble fibroin) water-soluble barrier peptide is designed to reduce the appearance of redness in as little as 1 week, while also reducing the appearance of fine lines and wrinkles, per the company.

The material works by spurring the natural production of claudin-1, which supports the epidermal barrier function, thereby reducing TEWL in as soon as 1 week, per Evolved by Nature.

Furthermore, because the Natrue 100% natural technology is soluble in water, it can be formulated into products that ceramides and petrolatum cannot. The ingredient is also biodegradable and generated from upcycled materials, according to the company.

"Everyone has been talking about skin barrier for a few years now," says Carolina Denman, Evolved by Nature's director, North America applications R&D and natural ingredients, "but it's always been the foundation of true and natural skin care because, very simply, a healthy barrier keeps moisture in your skin and keeps free radicals and other environmental hazards out."

She adds, "Everyone has also been talking about peptides, and our naturally derived peptides do what other ingredients cannot do. Activated Silk 33B-α turns skin on to perform its own skin care—when the peptide interacts with the skin it supports the natural production of claudin, the foundational protein for tight junctions, which is a sign of a healthy barrier."

Denman adds, "Another benefit of our naturally derived peptides is that they are water soluble, which means 33B is stable and effective in so many formulations where other barrier ingredients like ceramides and petrolatum cannot go. Especially rinse-off formulations. Hand wash. Face wash. Body wash. You rinse the suds off and the peptides stay on the skin doing the work. Nobody else has a barrier ingredient that does that."

Evolved by Nature has also developed Activated Silk 27P-α (INCI: soluble fibroin), a collagen type 1 peptide that supports natural collagen type 1 production to reduce the appearance of fine lines and wrinkles and enhance the elasticity and firm appearance of the skin, all while boosting the performance of other ingredients, including vitamin C.

The technology can be used in aqueous formulations and is non-irritating and biodegradable.

"This peptide is able to interact with skin to support the natural production of type 1 collagen, the foundational form of collagen that retinol and vitamin C need to be effective," says Svetlana Marukian, VP, R&D, The Molecule Library, Evolved by Nature. "So, from one perspective, 27P-α outperforms the legacy collagen ingredients, but this peptide also boosts the effectiveness of those ingredients. And 27P-α has a much higher stability than, say, vitamin C, which is vulnerable to oxidation and other degrading factors under so many exposures. And 27P-α is totally gentle and safe for use compared to harsher ingredients like retinols."

Decoupling 'Vegan' and 'Sustainable'

The last five years of Google search data shows that consumers routinely query terms such as "cruelty-free" and "sustainable" alongside vegan beauty, reflecting both shoppers' interest in products offering all three qualities and the frequent conflation of these concepts.



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Jonathan Graham, Evolved by Nature's senior director of translational marketing, argues, "'Vegan' is a marketing word masquerading as a sustainable cause. And it has actually done a disservice to vegans."

Graham explains, "If you are a vegan, then vegan ingredients are the right choice for you. But when 'vegan' is used as a signal for sustainability, it can be very misleading. For one thing, petrochemicals and polyurethane based ingredients can be considered vegan and those are 180 degrees from sustainable. And when you consider the water and energy resources needed to manufacture many vegan ingredients, it pushes them further away from sustainable."

It should be noted, of course, that soluble fibroin, the basis for the two Evolved by Nature peptides discussed in this report, is a silk protein most often produced by insects, including moths—and is therefore not vegan.

Graham argues, "If we are experts on anything, we are experts on two things—naturally-derived peptides and sustainability. And we know that the truest marker of sustainability is circularity. Upcycling existing, naturally occurring resources from the supply chain, reducing waste and consumption. This is why our peptide technology is both sustainable and cruelty free. Something many vegan ingredients cannot say."

Expanding Microbiome Claims to Menopausal Sexual Wellness & Odor Control

Laboratoires Expanscience's Calybiota Bio (INCI: glycerin, water and *Bombax costatum* flower extract) is an active ingredient designed to rebalance the skin microbiota with a prebiotic effect. Sustainably sourced from the red kapok tree flower calyxes in Burkina Faso, the material has reportedly been confirmed to rebalance women's intimate flora and reduce unpleasant male body odors via optimization of the axillary microbiota.



Calybiota Bio is recommended for intimate hygiene care to alleviate discomfort and soothe and hydrate the intimate area. In this way, Calybiota Bio can improve the sexual well-being of women, particularly post-menopause.

The source botanical is an oxalogenic species capable of sequestering carbon. To produce Calybiota Bio, Laboratoires Expanscience reportedly leverages sustainable harvesting of red kapok tree flower calyxes without harming the tree itself.

Calybiota Bio had previously demonstrated its effectiveness in rebalancing women's vaginal flora through a prebiotic effect on *L. gasseri*, *L. acidophilus* and *L. jenseni*. It is therefore recommended for intimate hygiene care to alleviate discomfort and soothe and hydrate the intimate area. In this way, Calybiota Bio can improve the sexual well-being of women, particularly post-menopause.

Most recently, research showed that a 1.5% concentration of Calybiota Bio "significantly" reduces unpleasant body odors by optimizing the axillary microbiota of men. Per Laboratoires Expanscience, axillary dysbiosis can lead to both a weakened barrier function and unpleasant odors.

The clinical study involved 27 men who, when exposed to a solution featuring 1.5% Calybiota Bio, experienced improved bacterial diversity and quantity. This prebiotic effect included a positive shift in the ratio of *Staphylococcus* (beneficial species) to *Corynebacterium* (odor-associated bacteria).

The rebalancing of odor-associated *Corynebacterium* species reduced the presence of volatile organic compounds (acetic acid, butyric acid and valeric acid), which are responsible for unpleasant odors, by 56.8% within 24 hours.

Beyond intimate care and axillary odor, Calybiota Bio can reportedly be applied in solutions for atopic dermatitis (targeting *S. aureus*) and acne and seborrheic dermatitis (targeting *C. acnes* and *M. furfur*, respectively).

Finding Oxidative Balance

CLR claims its antioxidant CefiraProtect CLR (INCI: betaine (and) isomalt (and) *Lactobacillus* ferment lysate (and) kefiran) empowers skin to resist aging by helping it maintain its own oxidative balance.

In clinical trials, per the company, CefiraProtect CLR significantly

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reduced hidden inflammation in 90% of participants, compared to the placebo. This, in turn, helped preserve the skin's youthful qualities and overall health by maintaining:

- radiance
- firmness
- elasticity
- barrier function

The vegan and fermented skin care material is derived from probiotic *Lactobacillus kefiranofaciens* from kefir grains. Its benefits are attributed to its kefiran polysaccharide content.

Growth Factors for Enhanced Anti-aging Efficacy

Biotech and plant-derived recombinant protein specialist Core Biogenesis has entered the beauty scene with two launches—Peauvita (FGF-2-oleosome) and Peauforia (EGF-oleosome)—to combat four key signs of aging. Per the company, these advanced growth factors offer high stability and efficacy against wrinkles, hyperpigmentation and more.

Using a patent-pending plant biofactory production process, Core Biogenesis produces bioactive compounds such as peptides and proteins from the seeds of *Camelina sativa* plants. These proteins are fused to the surface of oleosomes—natural oilseed reservoirs— to create stable actives with enhanced skin delivery.

The names Peauforia (FGF-2-oleosome) and Peauvita (EGF-oleosome) were inspired by the French term for skin, *peau*, combined with the concepts of vitality and euphoria.

According to the company, Peauvita (EGF - Oleosome) and Peauforia (FGF2 - Oleosome) were tested in a placebo-controlled clinical trial (n = 60) by a third party using each active at 1%. Results revealed Peauvita significantly reduced the appearance of fine lines and wrinkles while boosting skin firmness in just 14 days.

Moreover, Peauforia diminished melanin in hyperpigmented areas and restored the skin barrier within the same timeframe. Taken together, the actives offer a comprehensive solution to target these four primary signs of aging.



Using a patent-pending plant biofactory production process, Core Biogenesis produces bioactive compounds such as proteins. These proteins are fused to the surface of oleosomes—natural oilseed reservoirs— to create stable actives with enhanced skin delivery.

"Our focus has been on growth factors, essential proteins naturally found in the skin that diminish with age, contributing to the aging process," says Alexandre Reeber, president and CEO of Core Biogenesis. "Through our innovative technology, we've successfully stabilized two of the most sought-after growth factors, [epidermal growth factor] (EGF) and [fibroblast growth factor 2] (FGF-2), which promise enhanced efficacy for skin care brands and, ultimately, the consumer."

Lifting x Thickening: Multifunctional Beauty

Seppic's natural (ISO 16128), biodegradable Solagum AX thickener (INCI: *Acacia senegal* gum (and) xanthan gum) was recently clinically shown to impart lifting and other skin benefits just 30 minutes after application.

Additional effects with Solagum AX at 1% include, per the company:

- sensation of freshness during application
- brighter and more radiant skin complexion
- reduction in crow's feet wrinkles and spots
- skin-softening effects

According to Seppic, Solagum AX is an association of acacia and xanthan gums that is 100% natural and readily biodegradable. The multifunctional rheology modifier is said to perform better than xanthan gum alone in terms of thickening and stabilizing formulas, while bringing film-forming, soothing and moisturizing properties.

The polymer also reportedly imparts a better aqueous sensation with a non-stringy effect and, as previously described, is water-soluble, dissolving quickly, and is compatible with hydrophilic pigments.

Per the company, to create natural and minimalist cosmetics without compromising on performance, formulators have sought natural,

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multifunctional excipients that go beyond their initial properties. Solagum AX provides a solution.

In addition, per the company, Solagum AX's higher pH and electrolyte resistance allows it to maintain viscosity even with active ingredients (such as urea, glycolic acid, allantoin and aloe vera gel) or thermal waters.

Next-level Sensory Effects

P2 Science's Citropol DE-4 and Citropol V6 offer texture enhancement and a viable replacement for cyclomethicone, respectively. The natural-based ingredients are biodegradable and made from upcycled forest-derived terpenes.

According to P2 Science, the Citropol polymeric emollients represent the first new liquid polymeric emollients launched since silicones. Citropol DE-4 (INCI: bis-polycitronellyl duccinate), for example, is described as a unique and multifunctional high molecular-weight polymeric emollient. The ingredient is designed to create rich and luxurious textures, elevate the sensory experience of commonly used alkanes, and is said to provide conditioning benefits for hair. Citropol DE-4 is designed to be utilized in various formulations, including skin and hair care, rinse-off and leave-on, and color cosmetics.

Citropol V6 (INCI: bis-polycitronellyl succinate (and) undecane (and) C13-14 alkane), on the other hand, is described as a novel volatile emollient blend that combines spreadability with a light, non-greasy feel, to be used across the spectrum of beauty to create light, airy and second-skin-like formulations.

According to P2 Science, Citropol V6 is able to replace cyclomethicone, a widely used silicone in personal care products known for its smooth feel and quick-drying properties.

A New Generation of Alternatives

A Naturally Derived Phenoxyethanol Alternative

Dermegen Inc. recently launched its Dermacare NP natural synergistic preservative blend as an alternative to phenoxyethanol. Derived through fermentation, the ingredient imparts synergistic activity through its peptide complex and esters and is said to provide "unexpected" broad antimicrobial protection across a wide pH range.

Per Dermegen, while many beauty preservative systems are synthetic, derived from petroleum products and other non-natural sources, Dermacare NP (INCI: water (aqua) (and) 1,3-propanediol (and) glyceryl caprylate (and) epsilon polylysine) is naturally derived from ferment using a patent-pending peptide complex.

Supercharged Bakuchiol: a Retinol Alternative

Lipoid Kosmetik AG's BakuLipid (INCI: caprylic/capric triglyceride (and) bakuchiol (and) lecithin (and) tocopherol) reportedly combines the retinol-like efficacy of bakuchiol with unsaturated phospholipids to enhance skin penetration for anti-aging skin benefits.

Like other bakuchiols, the ingredient is purported to be gentler than retinol. And, by pairing the material with unsaturated phospholipids, BakuLipid features amplified potency thanks to enhanced skin penetration capabilities.

According to the company, BakuLipid has been proven to outperform conventional bakuchiol in vivo, effectively targeting blemishes and signs of aging, including the appearance of wrinkles. The ingredient also controls sebum production.

Olive-oil-derived D5 Alternative

Tri-K Industries' Fision EcoSil (INCI: hydrogenated ethylhexyl olivate (and) hydrogenated olive oil unsaponifiables) is an upcycled emollient derived from olive oil esters and unsaponifiables. According to the company, it offers sensorial effects comparable to D5 and low viscosity dimethicone for skin and hair care applications.

Fision EcoSil reportedly provides better wet combing and a similar hair sensory profile compared to D5. Furthermore, its skin sensory profile is similar to dimethicone. The ingredient features a natural origin index of 1.0, per ISO 16128 1:2016 & 2:2017.

"Currently, there is a noticeable shift among personal care consumers toward the use of naturally derived and upcycled ingredients," says Uriel Plata of Tri-K Industries. "Simultaneously,



According to P2 Science, the Citropol polymeric emollients represent the first new liquid polymeric emollients launched since silicones.

Image by tatyanarow at Adobe Stock

there is a growing emphasis on reducing the use of silicones, particularly cyclopentasiloxane (D5), due to stringent regulatory requirements in Europe."

Plata adds, "As D5 is widely used in personal care formulations, identifying effective alternatives presents significant challenges for formulators. Our Fision Ecosil, derived from olives, provides an ideal solution by addressing the demand for both naturally sourced and upcycled ingredients while delivering performance comparable to D5 in hair care applications and to low molecular weight dimethicones in skin care formulations."



Tri-K Industries' Fision EcoSil (INCI: hydrogenated ethylhexyl olivate (and) hydrogenated olive oil unsaponifiables) is an upcycled emollient derived from olive oil esters and unsaponifiables.

High-performance, Petrochemical-free Rheology Modifiers

Scotland-based Ingenza, an engineer of biological systems, has partnered with Denmark-based Cellugy, a fermentation expert, to explore the potential of biofabricated cellulose in personal care products.

In nature, cellulose can be found in the cell walls of green plants, some algae and fungus-like oomycetes. Bacterially produced cellulose produced at scale reportedly has the potential to replace fossil-based petrochemicals in consumer products, the firms argue.

This is particularly true for rheology modifiers; many conventional options are derived from petrochemical sources. Cellugy believes it can tap biotech cellulose to produce rheology modifiers that provide the high functionality of petrochemical-derived ingredients with the sustainable profile offered by conventional natural alternatives.

EcoFlexy RP, Cellugy's cellulose-based rheology modifier, was designed to offer "excellent" performance, "superb" skin feel and high naturality, per the company. The biodegradable technology is made from fermentation-derived cellulose that allows brands and formulators to either replace or supplement conventional rheology modifiers.



EcoFlexy RP, Cellugy's cellulose-based rheology modifier, was designed to offer "excellent" performance, "superb" skin feel and high naturality, per the company.

Moving forward, Cellugy is working on developing a range of beauty ingredients that improve on sensory, suspension and delivery performance.

Meanwhile, under the Ingenza-Cellugy agreement, which is intended to "accelerate the understanding and optimization of bacterial cellulose production," Cellugy will leverage Ingenza's knowledge of diverse microorganisms to "identify key factors influencing the cellulose production pathway."

This will reportedly allow Cellugy to improve cellulose yield and productivity for commercial viability.

"We are thrilled to join forces with Cellugy to explore strategies for improving bacterial cellulose production," says Cristina Serrano, senior scientist at Ingenza. "From a scientist's perspective, this project is an exciting opportunity to work with a new organism, which will in turn help us to showcase Ingenza's capabilities and expand our ever-increasing technical knowledge."

From top: image courtesy of Naypong Studio; image by Krakenimages.com at Adobe Stock

"This partnership with Ingenza perfectly aligns with our commitment to driving sustainability in biotechnology," says Deby Fapyane, cofounder and chief scientific officer at Cellugy. "By combining the expertise of both companies, we aim to accelerate the development of the next generation of bio-solutions for sustainable ingredients for the personal care market."

A Biodegradable Microbead Alternative

"Walnut shells have several sustainability advantages over conventional microbeads," says Helen Cantrell, director of marketing and sales, Eco-Shell. "They are biodegradable, while synthetic microbeads persist in the environment for centuries. Walnut shells from Eco-Shell are also annually renewable, come from a food byproduct and are sustainably processed. Cosmetic companies can reduce their environmental impact and promote sustainability with walnut shells."

Walnut shells also offer biodegradability claims for brands, Cantrell notes.

She explains, "[W]alnut shells help support biodegradability by naturally breaking down over time versus synthetic ingredients that are not biodegradable–a significant environmental concern. Walnut shells are processed sustainably in solar-run facilities and don't harm aquatic ecosystems when rinsed off. Using walnut shells in cosmetic formulations helps companies align with shopper demands, as consumers are turning to green products for their own health and the health of the planet."

Furthermore, Cantrell argues that walnut shells pose fewer supply chain challenges compared to other materials.

"Eco-Shell can control quality and supply, ensuring customers get what they need when they need it," she explains. "As a renewable resource, walnut shells are readily available and not subject to supply chain bottlenecks that other materials face." ■



"Walnut shells have several sustainability advantages over conventional microbeads," says Helen Cantrell, director of marketing and sales, Eco-Shell. "They are biodegradable, while synthetic microbeads persist in the environment for centuries."

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HCP's Solar Capsule collection is optimal for facial sunscreen, glow drops and hydrating after sun products. The lightweight 15 ml tottle design (a format increasingly popular for its convenience) features an elongated, domed profile and aluminum cap.

Image courtesy of HCP

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COSMETIC PACKAGING, INGREDIENT & TURNKEY TRENDS FOR 2025

Recent beauty events offered a look at the ways in which suppliers and contract/turnkey manufacturers can deliver newness to the industry.

From skinified sunscreen to travel-optimized beauty to a new generation of refillable packaging, suppliers and manufacturers offer new innovation opportunities for beauty brands.

Recent beauty events offered a look at the ways in which suppliers and contract/turnkey manufacturers can deliver newness to the industry. Here, we round up the latest innovations, including sustainable packaging components, turnkey skin care solutions, trendy tottle formats and much more. Here's our full breakdown.



GPI Beauty's turnkey Reformation skin care collection, meanwhile, offers sustainable formulations that soothe, hydrate and firm the skin.

The Skinification of Sunscreen

During MakeUp in NY 2024, Croda introduced a range of sunscreens inspired by the skinification trend, offering enhanced sensory effects and skin-friendly benefits.

The 3-in-1 Acne Prone Hero Sunscreen SPF 31 featured UV protection, acne scar care and makeup functionality to boost radiance, while the lightweight Deep Barrier Repair Anti-aging Fluid Mineral Sunscreen SPF 60+ presented a pampering mineral sunscreen.

Croda's Natural Skin Brightening Mineral Sunscreen SPF 36 is an >85% natural sunscreen stick without the downside of white cast, while the Smooth Sailing Daily Lightweight Mineral Sunscreen SPF 60+ mineral formulation (zinc oxide) offers broad-spectrum defense against harmful UVA and UVB rays.

To support low- to mid-viscosity sun care formulations, HCP's Solar Capsule collection is optimal for facial sunscreen, glow drops and hydrating after sun products. The lightweight 15 ml tottle design (a format increasingly popular for its convenience) features an elongated, domed profile and aluminum cap. Its slender nozzle facilitates precise, controlled application, per HCP, rendering it travel-friendly.

HCP's Solar Capsule can be manufactured with HDPE/LDPE mixes for increased squeezability, an EVOH layer for added barrier protection, and Dow's Surlyn for ultra-transparency and significant squeezability, per the supplier. It can also feature some level of R-PE to boost sustainability, while the elongated aluminum cap (PIR/PCR available) can be customized.

Mild and Natural Skin Care

Croda's recent concept products included the Naturally Boosted Smoothing Eye Cream, featuring more than 90% natural content per ISO 16128, which was designed for every skin type, while its Gentle Facial Cleansing Gel low-foam facial cleanser taps sulfate-free surfactants to leave skin clean and fresh.

Croda's Eco Age Defence Sensible Sleep Cream anti-aging moisturizing night cream, meanwhile, has reportedly been third-party tested and verified by Intertek Champaign Laboratories as containing <1 ppm 1,4-dioxane

Image courtesy of GPI

in accordance with NY State Senate Bill S4389B. The company's Naturally Boosted Blurring Stick is a >90% derived natural (according to ISO16128) formulation that improves skin texture, per Croda.

GPI Beauty's turnkey Reformation skin care collection, meanwhile, offers sustainable formulations that soothe, hydrate and firm the skin. Key ingredients include biosaccharide gum-1 and Opuntia ficus-indica stem extract. The collection includes eco-friendly packaging.

Droppers: Precision Packaging

To support precise and sustainable skin care application, HCP has launched the Uno Skincare Collection of pump and dropper designs.

The collection comprises monomaterial PP/PE droppers, auto droppers and atmospheric pump engines. The engines feature plastic springs to eliminate contamination in the recycling stream per HCP.

The designs also comprise PP dropper bulbs and pipettes. The Uno Skincare Collection includes a 150 ml lotion pump, a 50 ml auto-dropper and two 50 ml standard droppers for lotions, serums and liquid formulas.

Meanwhile, Albéa Cosmetics & Fragrance has launched the Pure Drop, an dropper made of 100% PP. The launch is part of a wider move by the company to embrace monomaterial solutions that support easy recyclability.

The company's Geo PET Droppers, meanwhile, are also available in 15 ml, 30 ml and 50 ml variants. The designs comprise PP collars, NBR bulbs, glass droppers and PET bottles. FusionPKG's Alpha PET Dropper is available in the same size variants and material mix as the options mentioned above.

Turnkey Clean Solid Fragrance

Tapping into the fragrance space, Cosmopak's new clean solid fragrances allow clients to supply their own



To support precise and sustainable skin care application, HCP has launched the Uno Skincare Collection of pump and dropper designs.



Albéa Cosmetics & Fragrance has launched the Pure Drop, an dropper made of 100% PP.

From top: images courtesy of HCP; Albéa



FusionPKG has expanded its dropper options with its Everyday PET Dropper, available in 15 ml, 30 ml and 50 ml variants.



FusionPKG's Alpha PET Dropper.



Cosmopak's new clean solid fragrances allow clients to supply their own signature scent, choose from our range of pre-made fragrances, or collaborate with a perfumer to create a custom fragrance—all to be housed in a premium base formula.

From top: images courtesy of FusionPKG; Cosmopak

signature scent, choose from our range of pre-made fragrances, or collaborate with a perfumer to create a custom fragrance—all to be housed in a premium base formula.

This format simplifies the development of fragrance projects while offering a format that is portable, alcohol-free, long-lasting, hydrating and non-irritating, and affordable.

The solid fragrances can be housed in the company's Ecoforward stick, jar, tube or compact packaging (PCR, refillable, metal, wood, bio-resin or glass).

Tottles: Boosting Ease & Accessibility

At recent packaging shows, suppliers everywhere have noted an uptick in interest in tottles, which offer portable, precise dosage of liquid products.

Case in point: HCP's ergonomic Twist tottle is designed for skin care and liquid cosmetics, including sunscreen, foundation, primer, serums and hair care, and features a 30 ml capacity.

The design offers one-handed dispensing for easy accessibility. Furthermore, the twist-opening mechanism eliminates the need for an overcap, per HCP. In addition, its raised tab design simplifies opening.

The Twist tottle can be recycled in the PP/PE recycling stream, with PCR materials available to reduce environmental impact. The refillable format allows for the cap to be retained for another refill base. Finally, an optional EVOH layer can be included for enhanced barrier properties.

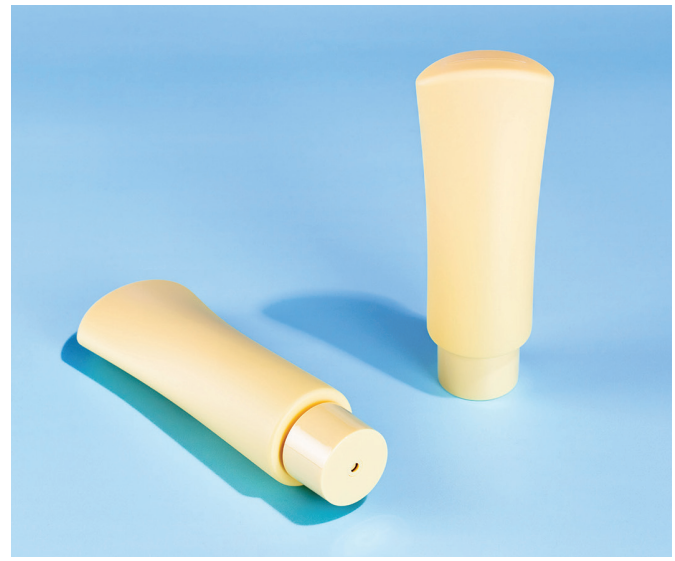
Elsewhere, the ICONS|ICS Tuttle is a 175 ml tube-shaped squeezy PE tottle with a center-dispensing PP cap for lotions, creams, gels, and other body or hair formulations. The design is available in a range of colors and can incorporate PCR. The Tuttle's center dispensing twist lock cap, meanwhile, offers opening with a single hand.

Intuitive Refillables

Albéa Cosmetics & Fragrance's Polaris monomaterial PP and



HCP's ergonomic Twist tottle is designed for skin care and liquid cosmetics.



ICONS|ICS' Tuttle is a 175 ml tube-shaped squeezy PE tottle with a center-dispensing PP cap for lotions, creams, gels and other body or hair formulations.



Albéa Cosmetics & Fragrance's Polaris monomaterial PP and refillable jar features a cap that is attached to the base with an invisible hinge.



Berlin Packaging's new 50 ml, 30 ml and 15 ml Luxe Refill glass jars feature reusable outer glass jars and reusable lids as well as a PP inner cup that can be closed with an aluminum seal for a hermetic closure.

refillable jar features a cap that is attached to the base with an invisible hinge. This design reportedly resolves cap issues while supporting full access to formulations. Polaris is refillable via the company's intuitive refill system.

"In order to further drive the adoption of refillable solutions, our role is to make them really simple—in other words: intuitive," says Aline Roland, marketing director at Albéa Cosmetics & Fragrance. "With our newest jar concept Polaris, we have taken another step forward by combining a unique and sophisticated design with a significant reduced environmental impact."

Elsewhere, Lumson's 50 ml Slim refillable glass jar (PCR variants available) can reportedly help cut associated CO_2 emissions by 56%. The design features a removable PP inner cup and PP cover that can be customized.

Berlin Packaging's new 50 ml, 30 ml and 15 ml Luxe Refill glass jars feature

From top, L to R: images courtesy of HCP; ICONS|ICS; Albéa; Berlin Packaging



Berlin Packaging's Pockii features a rounded design and is available in 50 ml and 100 ml glass bottles, as well as a 50 ml refill jar.



GPI's Pinch Refillable Jar provides a new method for removing inner jars from outer jars.

reusable outer glass jars and reusable lids as well as a PP inner cup that can be closed with an aluminum seal for a hermetic closure.

The 50 ml version is ideal for moisturizers, cream masks and thick lotions, while the 30 ml size is optimal for serums, eye creams and primers. Meanwhile, the 15 ml variant is ideal for eye creams, nourishing lip balms and specific treatments such as concentrated serums or anti-imperfection products.

The company's Loose Powder accessory collection, compatible with Luxe Refill jars, was created for makeup and skin care loose powder products. The Loose Powder sifters' hole size and position enable even and controlled product release, per Berlin Packaging. Available in large and small sizes, the sifters "assure a homogenous product distribution with perfect adherence to the glass jar," the company argues. The sifters also feature removable labels that protect formulas until consumers open the pack.

The 50 ml sifter jar ensures a uniform application of larger product quantities, such as body or face powders. The 30 ml jar is intended for powder blushes and illuminating and mineral powders, while the 15 ml is the right size for powder eyeshadows, translucent powders or concealers.

Berlin Packaging's Pockii, on the other hand, features a rounded design and is available in 50 ml and 100 ml glass bottles, as well as a 50 ml refill jar. The Pockii Refill jar, like the bottles, features a matte finish and tone-on-tone accessories. The rounded bottom design of all products in the collection adds a distinctive design-conscious touch.

Furthermore, Berlin Packaging's Heko design has been added to its Infusion Refill and Euphoria Refill fragrance collections. The bottles of the Heko collection, available in 50 ml, 30 ml and 15 ml, feature a minimalist design with square and clean lines.

GPI Beauty now offers a refillable dip tube Arch Pump comprising a propelling and repelling mechanism to reveal the actuator for pumping. Twisting the base 180 degrees brings the button up, per GPI, allowing the bottle and button design to be removed from the outer container for replacement with a new cartridge.

Furthermore, GPI's Pinch Refillable Jar provides a new method for removing inner jars from outer jars. Using the two side tabs, users grip and pull to remove the inner from the outer for recycling. The jar comprises recyclable PET, per the company.

US-made IML Tubes & More

ICONS|America has expanded its U.S. operations with a domestically sourced resin material blend that reportedly increases efficiency, reduces product carbon footprints and improves lead times.

The company's in-mold label (IML) tubes are available in PCR and monomaterial variants that are recyclable within plastic recycling streams. The tubes are also lightweight and durable, per the manufacturer, and support 360-degree decoration and finish options.

Elsewhere, Albéa Tubes has expanded the integration of recycled content into each component of its tubes, including caps, and to render packs recycle-ready. Its Slight Cap and Basic Cap can be rendered with 70% PCR; caps are available with both extruded and laminated tubes. At the same time, tubes can comprise as much as 60% PCR, per the company, depending on the chosen sleeve and head.

Albéa Tubes' NovaPrint deco technology, meanwhile, can print flat for laminate tubes, while avoiding

L to R: images courtesy of Berlin Packaging; GPI



ICONS|America's in-mold label (IML) tubes are available in PCR and monomaterial variants that are recyclable within plastic recycling streams.



FusionPKG's Verve Glass collection has been expanded from an atmospheric pump system to droppers and beyond, including a forthcoming PET airless system.



FusionPKG's Dream Glass Atmospheric features a two-piece design comprising its Atmos-One100% polyolefin pump engine with a recycle-ready glass atmospheric package with PCR options.

side seams with extruded tubes. Printing flat on PE film and welding it onto extruded tubes reportedly supports complex designs leveraging flexo, cold stamping, overprinted foil and more.

NovaPrint reportedly supports the reduction of sleeve thickness, thereby diminishing tubes' weight. At the same time, less energy is consumed.

Per the company, the incorporation of 100% PCR in the extruded sleeve allows packs to reach 57% of recycled content in a tube integrating the ultra-light EcoFusion Top. The solution is reportedly fully recycling-ready in the HDPE stream.

Next-level Glass

Glass is beloved for its reusability. To tap into interest in the material, several suppliers have expanded their glass offerings, including new sustainability upgrades.

For instance, FusionPKG offers luxe glass packaging, including variants with certified recycle-ready pumps. The components are manufactured at EcoVadis-recognized facilities, per the supplier, which feature waste-heat recovery, energy-efficient technologies and more.

FusionPKG's Dream Glass Atmospheric features a two-piece design comprising its Atmos-One100% polyolefin pump engine with a recycle-ready glass atmospheric package with PCR options. The 30 ml design has a 0.23 ml output.

Meanwhile, the company's Verve Glass collection has been expanded from an atmospheric pump system

From top: L to R: images courtesy of ICONS|America; FusionPKG



Stoelzle Perfumery & Cosmetics' new Lumi Coat UV filter, developed in cooperation with quantum dot specialist Nexdot for glass bottles, delivers UV protection and high optical clarity that protects color and fragrance without compromising the bottle's transparency, which is particularly important for recycling sorting and brand integrity.



Lumson has transformed its 50 ml Romantica glass jar via its deco lab, which offers unique 3D effects. Dubbed "Pebble," the company's design evokes rough stone textures on the glass jar and Confetto PP cover for an elevated sensory experience.

to droppers and beyond, including a forthcoming PET airless system. Verve variants, which can support Tru, Icon and Fresh pump variants (as of press time), is available in 15, 30 and 50 ml sizes.

On the clean formulation front, Stoelzle Perfumery & Cosmetics' new Lumi Coat UV filter, developed in cooperation with quantum dot specialist Nexdot for glass bottles, delivers UV protection and high optical clarity that protects color and fragrance without compromising the bottle's transparency, which is particularly important for recycling sorting and brand integrity.

The technology blocks UV light without affecting visible light, per the manufacturer, reportedly ensuring glass bottles remain optically clear. This eliminates the need for traditional UV additives like avobenzone, thereby supporting cleaner, more sustainable formulations.

Furthermore, Lumi Coat, which delivers a 10.5% improvement in the single score metric for anti-UV perfumery ingredients, reduces the need for stabilizing molecules such as UV absorbers, dyes and preservatives.

In effect, this coating technology can support the development of perfumes with fewer stabilizers and external additives, Stoelzle argues, and can be easily applied to various glass packaging designs.

On the sustainability front, Stoelzle Perfumery & Cosmetics' new Phoenix Collection delivers lightweight, recyclable and refillable perfume bottles. Available in six cylindrical variants, the lightweight design reduces CO_2 emissions, while the screw neck supports easy refilling and recycling to support product longevity.

The Phoenix range comprises bottles in sizes of 10 ml, 30 ml, 50 ml and 100 ml, as well as an SNI15 neck. The larger 150 ml and 200 ml bottles are equipped with GCMI 24-410 necks. These larger sizes can be used as refills for the smaller sizes, per Stoelzle, or for products like body care and lotions.

Deco techniques for the Phoenix collection include inner lacquering, spraying and screen printing. Furthermore, the bottles are compatible with closures and dispensing systems from fragrance pumps and caps to closures for cosmetics.

Elsewhere, SGD Pharma has completed its first manufacturing campaign using 20% PCR glass cullet at the company's Zhanjiang, China plant. The PCR glass bottles offer improved sustainability by reducing the use of virgin raw materials and carbon emissions due to less energy consumption during the melting process, SGD argues.

All the PCR cullet used at Zhanjiang plant is tested for purity before entering the furnace, per the supplier. The resulting PCR glass bottles therefore reportedly maintain the same levels of aesthetic quality, functionality and safety (with the absence of heavy metals and other prohibited materials) as conventional glass bottles.

Notably, FEVE (The Federation of European manufacturers of glass containers) claims that, on average, a 10% increase of cullet in the furnace decreases its energy use by 3% and CO_2 emissions by 5%. Should this be the case, a 20% usage of PCR would

L to R: images courtesy of Stoelzle Perfumery & Cosmetics; Lumson



HCP's Caresse packaging concept features a palette of skin tones to evoke a sense of warmth and intimacy, per the company.

generate 6% and 10% drops in energy use and emissions, respectively.

Standout Packaging Design

Lumson has transformed its 50 ml Romantica glass jar via its deco lab, which offers unique 3D effects. Dubbed "Pebble," the company's design evokes rough stone textures on the glass jar and Confetto PP cover for an elevated sensory experience.

Elsewhere, HCP's Caresse packaging concept features a palette of skin tones to evoke a sense of warmth and intimacy, per the company.

Shades include Soft Peach, Blush, Gossamer, Cashmere and Deep Brown to reflect the human form.

The Caresse aesthetic includes tactile surfaces and finishes that offer opaque softness, while the sculpted silhouettes "echo the contours of the human body," per HCP.

Finally, Lumson's Infinity packaging range makes its sustainable packaging stand out with a thick and conical base that offers a "refined" look. The range comprises four glass bottles ranging from 15 ml to 50 ml, as well as a refillable 50 ml glass jar.

The packaging can be rendered in PCR glass; the refillable jar, meanwhile, features a removable inner PP cup.

Travel-optimized Beauty

Cosmopak offers its clients travel-sized options for beauty brands seeking to provide shoppers with on-the-go solutions or offer budget-friendly or trial-based purchases. These smaller products also tap into rising shopper queries online, the company argues.

Convenience and on-the-go solutions were evident in Croda Beauty's recent slate of concept formulations, including the Draw It Out Activated Charcoal Cleansing Stick, which "allows you to feel refreshed and moisturized in one easy swipe anywhere you go," per the company.

Another travel-ready innovation is HCP's Ringo Stacker, a stackable and refillable 10 ml jar for skin care and complexion products, including foundation, primer, eye cream or lip balm.

By using the modular system, users can mix and match products to create personalized stacks to support daily beauty rituals. The space-saving Ringo Stacker features a secure click closure with a half-moon tab to ensure products remain leak-proof and protected from contamination.

The design comprises a PP inner pod, cap and shive, as well as an outer PET jar. The jars can be customized as needed, while the outer jar can be molded to be tinted or transparent.

The Acessorization of Beauty

Cosmopak has tapped sustainable fashion for brand accessories, as seen with its Ecoforward Biomaterial PU (polyutrethane) Crossbody Bag. Unlike petroleum-based alternatives, biomaterial PU reportedly emits fewer greenhouse gases during production.

And, by repurposing plant-based oils and agricultural waste materials,



Lumson's Infinity packaging range makes its sustainable packaging stand out with a thick and conical base that offers a "refined" look.



Cosmopak has tapped sustainable fashion for brand accessories, as seen with its Ecoforward Biomaterial PU (polyutrethane) Crossbody Bag. Unlike petroleum-based alternatives, biomaterial PU reportedly emits fewer greenhouse gases during production.

Cosmopak says it has embraced the principles of a circular economy wherein resources are reused or recycled, minimizing waste generation.

The bag was designed by Cosmopak's in-house creative team and is fully customizable. It can also be used as-is, with material colors and deco options tweaked for speedy launches. ■

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