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FEBRUARY 2025

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What's Driving Beauty & Personal Care Growth in 2025?

According to a report from Statista[1], the U.S. beauty and personal care market is expected to generate revenue of $104.10 billion in 2025. This growth is being fueled by several key trends:



Beauty influencers have had a significant impact on the beauty industry, especially after the launch of TikTok shop.

Continued Emphasis On Natural and Organic Ingredients: Consumers are increasingly seeking products with natural and organic ingredients, driving demand for clean beauty and sustainable formulations.

Hyper-personalization with AI: Artificial intelligence is enabling personalized beauty experiences, from AI-powered skin care recommendations to customized product formulations.

Biotech Innovations with a Focus on Sustainability: Advancements in biotechnology are leading to the development of innovative, high-performance ingredients with a reduced environmental impact. In fact, according to a report from Nosto[2], 68% of people are looking for products described as "clean" and 59% of people are influenced by products that are described as "natural and organic."

Beauty Sales and Brand Engagement on TikTok and Instagram: Social media platforms like TikTok and Instagram are playing a crucial role in driving beauty trends, influencing purchasing decisions, and enabling brands to connect with consumers. (The only question is: will TikTok survive a threatened ban? As of press time, the answer is unclear.)

Demand for Men's Beauty Products: The men's grooming market is experiencing significant growth, with a rising demand for high-quality skin care, hair care and grooming products.



Organic sourcing aligns with the "clean beauty" movement, where consumers prioritize natural, non-toxic, and ethically sourced ingredients.

In conclusion, the beauty and personal care market is poised for significant growth in 2025, driven by a confluence of consumer trends and industry innovations. As consumers prioritize natural and organic ingredients, seek personalized experiences, and embrace sustainable practices, brands are responding with innovative solutions, leveraging biotechnology, AI, and data-driven insights.

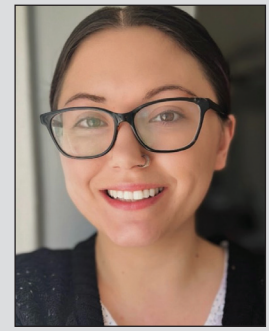
These trends, coupled with the continued evolution of social media's influence and the growing focus on inclusivity and diversity, will shape the future of the beauty industry worldwide.

Jennifer Posternack

[1] https://www.statista.com/outlook/cmo/beauty-personal-care/united-states#revenue

[2] https://www.nosto.com/wp-content/uploads/beauty-skincare-consumer-report-2021.pdf

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https://www.campo-research.com/

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Lip Butter

Lady Burd Cosmetics

https://www.ladyburd.com/product/lip-butter/

This silky lip mask hydrates lips with a wash of color to soothe and nourish dry lips instantly. Apply on the go for all day moisture and shine.



Iron Oxides

Spectra Colors Corp

https://www.spectracolors.com/

In cosmetics and personal care products, Iron Oxides are used in the formulation of a wide variety of product types, including makeup and skin care preparations. The Food and Drug Administration (FDA) lists Iron Oxides as a color additive exempt from certification. Iron Oxides are safe for use in coloring products, including cosmetics and personal care products applied to the lips, and the area of the eye, provided they meet certain specifications.

Images courtesy of the manufacturers



Sun Deep SPF 50 Sun Drops

Sun Deep Inc.

https://sundeepinc.com/

Meet the next evolution in sun protection: our SPF 50 serum, designed to deliver powerful defense with a low viscosity, dewy texture. This serum not only shields your skin from harmful UV rays, but also provides a hydrating after feel that keeps your complexion refreshed and glowing. With customizable tints available, you can effortlessly enhance your natural tone while enjoying the benefits of high-performance skin care. Experience sun protection like never before—luxurious, lightweight, and radiant.



Campo Plantservative

Campo Research

https://www.campo-research.com/

With the help of green chemistry and modern techniques, Campo Plantservative is produced from wildly cropped honeysuckle without the use of synthetic substances. Available in both water-soluble and oil-soluble versions, this functional ingredient contains phytochemicals with broad-spectrum antimicrobial properties against microbes, viruses, fungi, endospores and molds in products.



INSIDER INSIGHTS:

MANAGING COSTS AND SUPPLY CHAIN DISRUPTIONS IN THE BEAUTY INDUSTRY

The beauty industry is navigating unprecedented challenges, but brands are stepping up with innovative solutions. From leveraging predictive analytics to streamlining supply chains and prioritizing sustainability, the focus is on balancing cost control.



The beauty industry navigates a changing landscape—balancing innovation, sustainability, and cost control amidst rising challenges.

Image by gumpapa at Adobe Stock

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Jonathan Regev, vice president worldwide sales and business development, Jojoba Desert



Akemi Ooka, vice president of supply chain and sustainability resources for the Independent Beauty Association (IBA)



Dan Wolfe, senior vice president of business development at Cosmopak

The beauty industry is facing unprecedented challenges due to geopolitical instability and rising costs. Trade conflicts, supply chain disruptions, and inflation are forcing brands to adapt and find new ways to control costs while maintaining competitiveness.

To mitigate these challenges, companies are diversifying supply chains, implementing cost-control strategies like order consolidation and embracing technology like predictive analytics. Sustainability is increasingly intertwined with cost control, with brands prioritizing eco-friendly practices to reduce their environmental impact and enhance their brand image.

Sustainability and Cost Control: A Synergistic Approach

Jonathan Regev, vice president worldwide sales and business development, Jojoba Desert says, "The current geopolitical climate and ongoing trade conflicts have introduced complexities in the beauty industry, particularly in managing the costs of raw materials and logistics. At Jojoba Desert, we recognize that these times call for innovative and collaborative solutions."

Regev adds, "One key strategy we've implemented is encouraging our customers to consolidate their orders into larger, less frequent shipments and to opt for bulk containers instead of smaller-sized packaging. This approach not only reduces transportation costs - an increasingly significant factor in today's volatile market - but also aligns with our shared commitment to sustainability by minimizing packaging waste and lowering the carbon footprint associated with shipping."

Akemi Ooka, vice president of supply chain and sustainability resources for the Independent Beauty Association (IBA), says, "Some brands are negotiating multi-year contracts, anticipating that tariffs or global supply-demand imbalance will drive volatility. Contracts provide a measure of cost stability for businesses that they can plan against. They also typically provide some protection in tight supply markets. Additionally, many brands have pared down their assortment to their most essential SKUs—focusing on hero products and how to ensure those remain in stock and meet quality and consumer expectations, rather than launching a variety of niche flanker SKUs."

Ooka adds, "This reduces the need to carry lesser performing goods and associated raw and pack items in inventory, lowering complexity across the supply chain. I'm not sure that brands are increasing prices on the shelf ahead of future instability—that is often difficult to establish with retailers or consumers. In truth, brands have been dealing with higher costs for some time now, and many have already had to increase prices to relieve margin pressure or ensure supply. I anticipate that if costs rise again and cannot be offset, there may be additional price increases on the shelf."

Predictive Analytics and Supply Chain Resilience

Regev emphasizes the role of technology in navigating these challenges, stating, "Technology and data analytics are essential tools in navigating this uncertainty. Jojoba Desert leveraged predictive analytics to better forecast demand and optimize production cycles. This not only ensures our supply chains remain resilient and efficient, even in the face of global disruptions, but also helps us preserve the freshness of our products by aligning production closely with demand. Moreover, these tools enable us to maintain the exceptional quality and value our customers have come to expect."

She adds, "Transparency remains at the heart of our efforts. By openly communicating these strategies to our customers, we demonstrate how these adjustments not only help manage costs but also align with broader sustainability goals. These proactive steps reflect our commitment to building long-term resilience and delivering value, no matter the challenges we face."

Images courtesy of the authors



Alexandria Scoffell, brand manager at Kevyn Aucoin Beauty



Nick Ignazzi, operations director, Provital USA



Nina Esposito, marketing director, Provital USA

Cost of Raw Materials and Finished Goods

Ooka says, "Instability is always a major concern for businesses, and one of the biggest uncertainties today is the threat of tariffs on imported materials, particularly from China. There are a number of raw and pack materials that are sourced from China, along with various chemical intermediates that aren't produced elsewhere, and a trade conflict could not only affect prices but overall availability of goods or materials, regardless of price."

She adds, "What is also unclear is how the weakening consumer market in China will continue to play out in 2025—while supply is being focused more on domestic Chinese demand, excess material could still flood global markets, offsetting price increases from inflation or tariffs (though this may lead to further trade tension overall). It is quite uncertain what geopolitical developments will arise in the new year, but anything that disrupts global supply chains often has longstanding effects, particularly for specialty materials that cannot be easily replaced."

Dan Wolfe, senior vice president of business development at Cosmopak says, "The beauty industry continues to face challenges from trade conflicts and geopolitical instability, leading to rising costs for raw materials and finished goods. At Cosmopak, we understand the importance of agility in navigating these disruptions. Many brands are diversifying their supply chains, sourcing materials from multiple regions, and exploring near-shoring options to reduce dependency on a single market. These strategies not only mitigate risks but also enhance supply chain resilience."

Wolfe adds, "To address rising costs while maintaining competitiveness, brands are adapting pricing strategies with greater transparency, communicating price changes alongside their commitment to quality and sustainability."

He concludes, "Cost engineering and value delivery remain pivotal. At Cosmopak, we implement development strategies to execute the highest quality products that are commercially viable for our clients. Our sales and development team always works with cost targets in mind, while on an operational front we optimize supply chain efficiency, streamline production processes, and reduce waste. Combined, these drive both cost reduction and sustainability goals."

Ooka adds, "Brands are looking to sources outside of China to ensure secondary supply—they have been doing this since the post-Covid supply crisis. Interestingly, some of the post-Covid manufacturing investments by suppliers are now starting to come online in areas like Southeast Asia and Mexico, so there are options for brands to test and build secondary supply lanes. There is also interesting innovation in biotech-based raws, and those are less tied to a geographic area, which may create opportunities to establish manufacturing and supply in less volatile areas and with a much smaller footprint or shorter supply chains."

Alexandria Scoffell, brand manager at Kevyn Aucoin Beauty says, "The rise of TikTok and its shopping features brought a surge of micro-trends in beauty, fueled by influencers who aren't always professional makeup artists. While this led to an onslaught of impulsive purchasing, the dust is now settling, and consumers are beginning to see the value in investing in timeless products that work well for them on a daily basis, regardless of what is trending."

Scofell adds, "Additionally, when budgets tighten, people become more selective, embracing the philosophy of 'quality over quantity.' This shift mirrors trends in fashion, where consumers are gravitating toward durable, high-quality clothing—or even thrifted items—that stand the test of time, rather than fast fashion that quickly loses its appeal. While makeup can't be thrifted, the same principle applies: buying fewer, versatile products that form the foundation of a 'capsule wardrobe' for beauty – products that are reliable, interchangeable, and suitable for any occasion."

She concludes, "Beyond practicality, prestige brands like Kevyn Aucoin Beauty offer an emotional connection.

Images courtesy of the authors

When customers purchase from an artistry-led brand, they're not just buying makeup, they're investing in an experience, a story, and a connection to something empowering and aspirational."

Wolfe says, "Consumer trust plays a critical role in today's market. Brands are increasingly transparent about their efforts to manage costs responsibly and sustainably. By highlighting initiatives such as sustainable packaging, eco-friendly materials, and ethical production practices, brands can reinforce their commitment to delivering value while aligning with consumer expectations for responsible business practices."

Trade Conflicts and Global Considerations

Nick Ignazzi, operations director, Provital USA, says, "Potential trade conflicts and geopolitical instability are impacting the beauty industry like a bad hair day…unpredictable and messy. Predicting raw material costs is as reliable as forecasting next season's lipstick trends with a Magic 8 Ball. Tariffs, shipping delays, and sudden trade restrictions turn sourcing into a high stake guessing game."

Ignazzi adds, "To cope, brands are diversifying supply chains, essentially hedging their bets, and partnering with reliable suppliers. Some are localizing production or stockpiling raw materials like they're prepping for a beauty apocalypse. It's all about finding ways to keep the glow without the chaos. Shrinkflation, higher prices, and eating costs are all in play. The boldest brands eat the costs, hoping loyalty will outlast any turbulence. But honestly, adapting to trade disruptions feels like styling hair in a wind tunnel…creative, necessary, and absolutely unpredictable."

Value Delivery

In the cosmetics industry, "value delivery" encompasses more than just the product itself. It includes a combination of factors such as superior product performance, a strong brand story, a positive customer experience, ethical sourcing practices, and a commitment to sustainability. Brands that successfully deliver value create a strong emotional connection with consumers, fostering loyalty and driving long-term success.

"In beauty care, the secret to balancing cost and quality is like finding the perfect serum—multifunctional, efficient, and full of innovation," says Nina Esposito, marketing director, Provital USA. "From brand new endophytes to stem-cell powerhouses, brands are turning to ingredients with superhero status to deliver stunning results without the luxury price tag. Think biodegradable exfoliants and plant-based actives and preservatives making eco-glam the new norm."

Esposito adds, "Add a dash of sustainability storytelling, a sprinkle of transparent pricing, and a solid foundation of educational campaigns, and you've got a recipe for consumer love. With eco-chic packaging, carbon-neutral vibes, and streamlined formulations, brands are proving that affordability doesn't have to skimp on innovation or integrity—it's simply skin care smarter, not harder."

Ooka says, "The highest impact cost savings are often cross-functional team endeavors, as they often require secondary qualification and testing. This means it is best to get ahead of supply chain vulnerabilities so product and manufacturing teams can formulate and test with alternate materials if needed. It is also important to have solid communication with suppliers and manufacturers so that they understand your demand and can help you manage inventory, timelines, and cost of goods. There may also be options like payment term negotiations or blanket PO strategies that allow for more procurement flexibility and responsiveness across the supply chain."

AI's Influence on the Beauty Industry

From personalized product recommendations and virtual try-on experiences to accelerating ingredient discovery and optimizing supply chains, AI is transforming how brands interact with consumers and develop new products. This technology is enabling hyper-personalization, enhancing the customer experience, and driving innovation across the entire beauty ecosystem.

Ooka says, "AI is showing up in procurement vis a vis RFPs (both drafting and analyzing), and it is being used in demand planning and logistics as well. I anticipate it will continue to be a resource growing in importance and influence in the year to come. That said, AI data and processes should always be validated, as the information is only as good as the input data, and it can be difficult to know where the source data originates (and thus how accurate it is). There is also some utility in AI for formulation development, as it is being used this way in food, though I think this is slower to be adopted in personal care and cosmetics."

Esposito concludes, "Meanwhile, AI is the industry's fairy godmother, conjuring up trend-savvy formulations, lightning-fast launches, and digital crystal balls for ingredient tracking and transparency. Virtual testing steps in as the cost-slashing skin care guru, ensuring every product is trial-approved without breaking the budget."

How Brands Can Navigate Uncharted Waters in the Beauty Industry

To thrive, brands must prioritize a multi-pronged approach. This includes diversifying supply chains, embracing technology like AI and predictive analytics for cost optimization and demand forecasting, and implementing innovative cost-control strategies like order consolidation and sustainable packaging. By focusing on delivering value through high-quality, innovative, and sustainable products while maintaining transparency with consumers, beauty brands can build resilience, navigate uncertainty, and continue to thrive in this dynamic market. ■



The desire for skin care-makeup hybrids has been gaining steam in recent years, with SPF claims no exception.

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BEAUTIFYING SUN PROTECTION IN 2025: TOP INNOVATION TARGETS

From emerging ingredient technologies and testing methods to unique formats, SPF-powered beauty is leveling up.



While sunscreen—and, to some extent, SPF-infused products—can be seasonal, the growing incorporation of sun defense into a growing array of beauty segments is making protection more of a year-round, cross-category phenomenon. Paired with new ingredients and advances in testing, this movement is poised for ongoing growth. In fact, the global sun protection market[a], comprising only adult sunscreens, sun sprays and after-sun lotions, per Statista, was valued at nearly $11.5 billion in 2024—and is projected to grow at almost 3.9% annually through 2029. Given the proliferation of sun defense into a growing array of product categories, that's just the tip of the SPF beauty iceberg. Let's break down the top product innovation and marketing targets for brands in 2025 and beyond.

The Beautification of Sun Defense

Google Trend search data for December 2023-December 2024 reveals that top SPF-related searches in the United States included queries for face creams and eye correctors, products with SPF 50 claims, lip balms and melt-in formats.

The data reveals a general trend toward SPF beauty across categories, as well as a desire for high defense.

A June 2024 Spate report[b] backed up this general trend. At the time, the firm noted a search spike for the Alastin brand, which was directly associated with consumer interest in tinted sunscreens/tinted SPF.

The desire for skin care-makeup hybrids has been gaining steam in recent years, though the Alastin brand also benefits from its clinically backed positioning, per Spate. This focus on proven efficacy is part of a larger trend impacting the whole of the skin care sector.

What Consumers Want from Sun Care

Spate offered a breakdown of consumer preferences around sunscreens and other SPF beauty products. Based on its analysis, consumers are looking for:

- Sun care-skin care hybrids such as SPF-powered anti-agers and tinted moisturizers

[a]www.statista.com/outlook/cmo/beauty-personal-care/skin-care/sun-protection/worldwide#revenue

[b]www.spate.nyc/reports



K-beauty is once again having a moment in the U.S. market, driving sales for Korean brands, as well as inspiration for Western players; sun care is no exception.

- Mineral formulations, led by zinc, with titanium dioxide queries lagging far behind
- Formulations ideal for sensitive and mature skin
- Lightweight formats such as water-based formulations and balms
- Portable options such as sticks (see K-beauty Sun Care)

In addition, consumers showed interest in novel formats such as gel sunscreens, as well as expanded applications, particularly hair sunscreens.

Interest in hair solutions have tracked with increased SKUs in the space, including Sun Bum's SPF 30 Scalp Hair Mist, Banana Boat's Hair & Scalp Defense Sunscreen Spray SPF 30, Supergoop!'s Poof 100% Mineral Part Powder SPF 35, and Coola's Scalp & Hair Mist Sunscreen SPF 30.

K-beauty Sun Care

Sun defense is riding the recent wave of K-beauty in the U.S. market. A 2025 trend analysis from Spate notes that interest in Korean sunscreens is expected to grow in 2025, per Spate, which separately points out that SPF is a top volume growth leader in beauty in general. Top brands associated with Korean sunscreen searches include Skin1004, Round Lab and Beauty of Joseon.

"[T]he growth in searches for Korean sunscreen and its very high volume indicates this trend's high potential," Spate's report explains, adding that "this trend refers to the concept of the Korean sunscreen—and associated characteristics—rather than specific Korean brands…"

Key concerns associated with Korean sunscreen queries include oily, sensitive and acne-prone skin. Interest in the category also includes unique formats such as sprays, mists and, of course, sticks.

To illustrate how these trends have manifested in the market, a June 2024 Spate report revealed a spike in U.S. online searches for the K-beauty brand Tocobo, spurred by interest in its Cotton Soft Sun Stick SPF50 PA++++.

The non-sticky vegan stick comprises cotton extract and offers easy portability. Furthermore, the product's formulation delivers UVA and UVB protection, anti-inflammatory benefits and sebum control. This multifunctionality and ease of use highlight key facets that shoppers find attractive in the K-beauty space.

When it comes to Korean sunscreens, there are some key considerations to take into account. Notably, many of these products are formulated with more advanced UV

Image by Luoxi at Adobe Stock

filters compared to what one might see in the U.S. market.

This shouldn't be surprising, given that the United States has not approved new UV filters since 1999, inhibited by our regulation of filters as drugs. Furthermore, Korean sunscreens have lightweight formulations (designed for reapplication) versus American formulations that tend to be thicker in consistency.

New Tools for Combatting UV Exposure

Beyond what the search data reveals, emerging ingredient technologies offer enhanced SPF beauty performance and sensory experiences.

UVB-triggered UVA Absorber

During the December 2024 Society of Cosmetic Chemists' 78th (SCC78) Annual Scientific Meeting and Technology Showcase, Judit Carmago, Ph.D., of Roka Furadada reported that methoxyphenylethenyl t-butylbenzoate (MPEBB), a photochemical precursor, becomes a UVA absorber when exposed to UVB.

The transformation takes place through a photo Fries reaction, Carmago explained. As a result, MPEBB increases UVA protection over time to protect against photoaging, cell death, oxidative stress, inflammation and dermis degradation.

Cellulose to Boost SPF

During another SCC78 presentation, Deby Fapyane, Ph.D., of Cellugy ApS, explored the use of a redispersable cellulose powder to boost high-performing SPF.

The cellulose was fabricated by bacteria and reportedly demonstrated a unique 3D network of thin crystalline cellulose fibrils interwoven in water, which can stabilize active ingredients and form a protective barrier against UV radiation.

Per Fapyane, these characteristics position the cellulose as a powerful SPF booster.



Image by wavebreak3 at Adobe Stock

During SCC78, Bryan Taylor and Anna Wojkowski of Inolex, Inc., offered ideas to "democratize" dispersion by improving bio-based dispersing fluids for ZnO.

High-SPF Encapsulated UV Filter Blends

Elsewhere, during the 2024 edition of in-cosmetics Asia, Clariant highlighted a lineup of high-performance ingredients, including the Eclipsogen CAP series of encapsulated UV filters, featuring the company's Nanocon encapsulation technology.

Per Clariant, even at low concentrations in formulas, Eclipsogen CAP helps to achieve high SPF values in sun care products.

The technology is reportedly cold processable, readily compatible with sunscreen ingredients, and enables light skin sensory benefits with no white cast.

Enhancing Sun Care Sensory Attributes & Zinc Loads

During SCC78, Bryan Taylor and Anna Wojkowski of Inolex, Inc., offered ideas to "democratize" dispersion by improving bio-based dispersing fluids for ZnO.

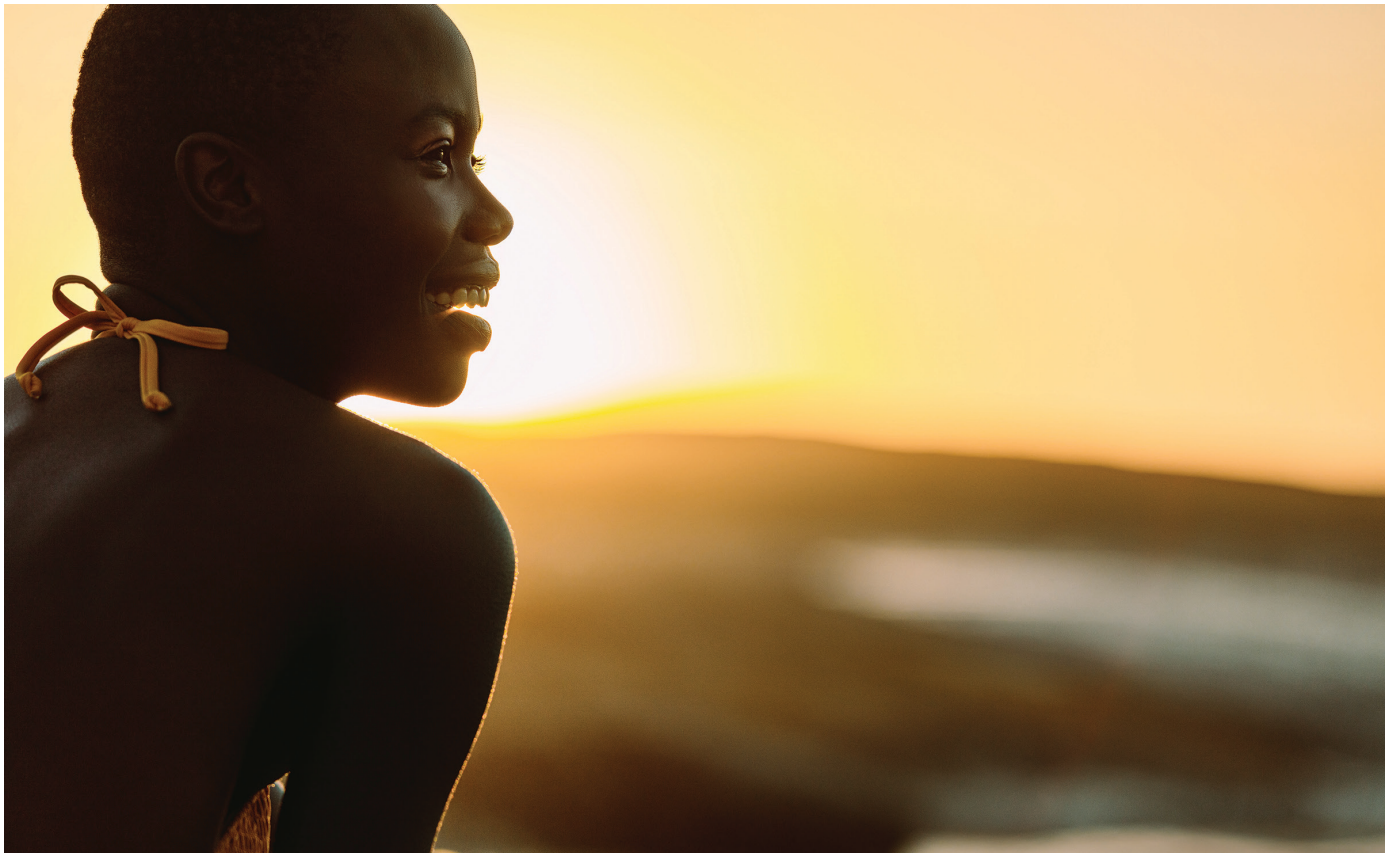
Novel dispersing media were reportedly developed based on combinations of biobased esters with specific grades of polyhydroxystearic acid (PHSA). These esters—heptyl undecylenate, diisooctyl succinate and triheptanoin with PHSA—were evaluated as dispersing media for uncoated, non-nano and UV grade ZnO.

Per the team's presentation abstract, dispersions were evaluated for viscosity as functions of PHSA and ZnO, then used to make w/o and o/w emulsions that were characterized by rheological analysis and UV transmittance.

Findings showed the "unique combination of biobased esters and broad molecular weight distribution PHSA exhibited dramatically lower viscosities than dispersions based on caprylic/capric triglyceride, enabling higher solids loadings of ZnO and more desirable rheological and sensory profiles for sunscreens."

Smart Pigments for Transforming Blue/Visible Light

During SCC78's inclusive beauty session, Joan Attia, Ph.D., of Lucas



During SCC78's inclusive beauty session, Joan Attia, Ph.D., of Lucas Meyer Cosmetics described "smart pigments (SP)," i.e., a mixture of fluorochromes that can reportedly transform blue/visible light to higher wavelengths, protecting the skin and improving mental health.

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Attia explained, "SPs represent a new category of ingredients, able to capture harmful unbalanced light, such as blue light emitted by digital screens, blocking its effects on skin, and converting it into more beneficial light for both skin and general well-being."

Ingestible After-sun Recovery Booster

Tosla Nutricosmetics recently unveiled the results of a clinical study (pre-publication) for its vegan Lumina365 supplement, which comprises "natural ingredients and targeted vitamins proven to bolster skin's UV defenses by neutralizing free radicals and reducing melanin-induced redness." Other key ingredients include calaguala leaf extract.

The supplement, in the form of a 25-ml daily shot, includes the company's Velious flavor technology, which "conceals unpleasant tastes and improves product palatability," per Tosla. This masking technology, in addition to xylitol, supports the supplement's Sicilian red-orange flavor, which renders the daily shot more palatable to users.

Per Tosla, after eight weeks of administration in a clinical trial, the product reduced participants' skin redness by 46.2% 24 hours after UVB exposure, in turn increasing the minimal erythema dose by 23.8%.

According to the company, Lumina365 therefore can provide an additional layer of whole-body sun protection when used with topical sunscreens.

Tosla's chief innovation officer, Uroš Gotar, explains, "We saw an opportunity in the sun care market for multifunctional products that not only protect, but enhance skin's appearance. Lumina365 represents this new wave of 'beautifying' sun protection, combining functional benefits with aesthetic appeal."

A Sunscreen-friendly Brightener

Evolved By Nature has debuted a new bioactive peptide, Activated Silk 8A-α, which is reportedly safe for sensitive skin and stable in sunscreen formulations, whereas many other skin brighteners are not.

According to the company, the ingredient supports natural late-stage cell differentiation and is clinically proven to turn the skin "on" to reduce the appearance of hyperpigmentation and improve the appearance of skin brightness.

Image by Jacob Lund at Adobe Stock

Activated Silk 8A-α is said to provide the benefits of exfoliation from the inside out, making "unreliable vitamins and chemical peels a thing of the past."

Activated Silk 8A-α functionality, paired with its unique stability, makes it a candidate for delivering skin care-sun care hybrids.

A New Era for SPF & Sun Defense Testing

SPF beauty testing has also advanced, offering new tools to product innovation, marketing and compliance teams.

A New ISO Standard for in vitro SPF Testing

Published in December 2024, ISO 23675:2024 comprises[c] the in vitro determination of static sun protection factors. Notably, this method is "not applicable for the determination of water-resistance properties of a sun protection product."

Per the ISO publication, the method is "applicable to sunscreen products in form of an emulsion or alcoholic one-phase formulation, excluding in form of a loose or compressed powder or stick."

The publication includes details on the "determination of the spectral absorbance characteristics of SPF protection in a reproducible manner."

Sunscreens' Temperature Factor

How important is temperature to the performance and behavior of sunscreens? Very.

During SCC78, Samuel Gourion-Arsiquaud, Ph.D., of TRI Princeton, outlined how an increase in temperature impacts the penetration of sunscreen into skin. Visualization was performed by vibrational imaging spectroscopy and HPLC methodologies.

The results showed a correlation between the external temperature and penetration of organic UV filters, where 42°C/107.6°F increased the penetration of organic UV filters into the skin, while physiological conditions (32°C/89.6°F) and lower temperatures (20°C/68°F) restricted it.

Significant differences in behaviors between encapsulated and non-encapsulated formats also were recorded.

"Based on our findings, we recommend evaluating sunscreen formulations at higher temperatures than the current standard of 32°C," Gourion-Arsiquaud said.

SPF Beauty: What's Next?

From better testing to establish claims and performance to new ingredients offering enhanced defense and holistic care, the SPF beauty space is poised for growth and innovation that meets the convenience, functionality and safety demands of today's shopper. ■

[c]www.iso.org/standard/76616.html



2025'S MAKEUP TRENDS MOVE BEYOND LIPS & BLUSH

Solutions for underserved mature and acne-prone consumers, as well as emerging trends in eye and brow products, offer innovation for brands beyond color cosmetics' superstar sectors.



Image by Cultura Creative at Adobe Stock

For the first six months of 2024, the U.S. lip makeup segment was a juggernaut, expanding by 21% in dollar terms and 23% in unit terms. But that's far from the full story for brands seeking innovation opportunities.

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In recent quarters, color cosmetics have consistently featured two superstar categories—lips and blush. However, digging into emerging data, other opportunities emerge, pointing to a select resurgence in eye segments, as well as unmet concerns that could drive product innovation and marketing initiatives for brands in 2025 and beyond. Let's get into the data.

Yes, Blush and Lips Still Dominate Makeup

First, we must acknowledge the realities of today's market. Makeup is the largest U.S. prestige beauty category, growing at 5% year-over-year in dollars and units, per Circana data[a] for the first nine months of 2024—that's faster than skin care but significantly slower than hair and fragrance. Mass actually contracted about 3% in the same period.

As in previous quarters, the lip makeup segment was a juggernaut, expanding by 21% in dollar terms and 23% in unit terms. Key drivers included tinted lip balms and oils. (For a deep dive of opportunities in the category, read our 2024 makeup report[b].)

Further driving lip sales are the sheer number of new launches coming into the space. Per Circana, there has been "a doubling of dollar sales tied to launches this year [2024] through September, compared to 2023."

Spate's recent 2025 trend forecast[c] recently highlighted several key search trends that could drive further growth in the lip category, noting gains in queries for brown and "dark" lip liners, as well as peel-off lip stains.

We also apparently also haven't hit peak blush, per Circana, with the category's sales up double-digits.



In September 2024, Milani Cosmetics launched a hybrid highlighting blush, the Cheek Kiss Liquid Blush + Glow. Retailing for $12.99 as of its launch, the SKU reflected a boom in the blush sector.

According to a December 2024 report based on Spate's New Popularity Index, which combines Google and TikTok data, jelly blush has been a standout trend in recent months.

This "vibrant blush stain with a jelly, elastic texture," as Spate puts it, is typified by Milk Makeup's Cooling Water Jelly Tint, which has massive search volume and TikTok popularity.

As Alison Wery, assistant lecturer at the University of Toledo's Department of Pharmacy Practice, reported in March 2024, "this product is all about texture," led by the inclusion of agarose, a purified version of agar that is, interestingly, a popular gelling agent used in microbiology to grow microorganisms in petri dishes. The polysaccharide is extracted from red seaweed that, when heated and cooled, becomes a solid and squishy gel due to hydrogen bonding. Milk Makeup's Cooling Water Jelly Tint also includes carbomer, another gelling agent.

The prevalence of this unique formulation "indicates consumer openness to innovative textures and formats," Spate argues, "particularly those with a glossy finish."

Despite the popularity of blush, however, other formats are also favored in the cheek sector, namely cheek tints. This portable format (compared to powder blushes) provides a "buildable watercolor effect," per Spate, imparting a "natural flush" that can be controlled by the wearer. The format is also multifunctional, allowing consumers to apply pigment to the lips, cheeks and eyelids.

But this boom in the cheek and lip categories isn't the whole story. New

[a]www.circana.com/solutions/complete-beauty/

[b]www.gcimagazine.com/brands-products/color-cosmetics/article/22917466/2024s-fastestgrowing-makeup-categories-lips-unique-formats

[c]www.spate.nyc/reports

Courtesy of Milani Cosmetics



Mature makeup shoppers have a number of key concerns, including cakey makeup and dry lips.

Spate data points to emerging interest in eye categories, as well as a number of unmet needs.

Eye Category Comeback

With few exceptions, including a brief blip during the heavy masking days of peak-pandemic life, eye makeup has been largely off the radar in terms of growth-driving sectors. But Spate data shows that a focus on eyes may be coming back.

Aegyo-sal: Recapturing Youth

Korea isn't just leading beauty trends via K-beauty innovation; even its cultural concepts are shaping preferences. *Aegyo-sal* is a Korean term referring to the "baby fat" beneath one's eyes, which (in some circles) is seen as a sign of youth.

In its 2025 predictive report, Spate anticipates that Google searches for *aegyo-sal* will grow 134.7% between September 2024 and September 2025.

Google search data for the 12 months between December 2023 and December 2024 show that one brand dominates *aegyo-sal* queries: Colorgram's All In One Aegyo-Sal Maker.

Available in seven colors, the Korean brand's dual-ended contour stick features a "shimmery side to highlight your under-eye area," as well as a flat matte side to add "subtle shading" to give the illusion of the sought-after pouches, which in turn evoke a sense of larger eyes.

Lashes & Brows: High & Low Maintenance

Spate predictive data points to simplicity in the eye area, as evidenced by strong growth forecasts for brow stains and tubing mascaras. At the same time, however, maximalist shoppers are forecast to pursue cluster lashes.

Mature Makeup: Untapped Opportunities

Queries for mature skin makeup over the most recent 12-month September-September period revealed "medium volume," per Spate. Notably, only two brands dominate these queries, Laura Geller and L'Oreal Paris, pointing to wide-open competition.

At the same time, mature shoppers clearly have some unmet needs, which provides further opportunities for nimble brands. Spate's report notes that searches for cakey makeup and creasing concealer are both up, pointing to perennial frustrations among older consumers.

As Spate puts it, "[T]he growth of concerns like cakey makeup and concealer creasing showcases the demand for makeup that blends seamlessly with the skin, especially for mature and dry skin types."

Image by Antoni Shkraba at Pexels

This is a cross-category phenomenon, pointing to innovation windows for hybrid products. Notably, in the skin care sector, Spate has noted a 2.9K monthly spike in searches related to mature skin, as well as a 1.4K jump in searches related to dry lips (see Sarah Creal's Speak For Yourself Hydrating Lipstick).

According to Circana, Gen X consumers (those born between 1965 and 1980) are heavier purchasers of makeup compared to boomers, millennials and Gen Z.

In August 2024, Larissa Jensen, vice president and beauty industry adviser at Circana, told *Global Cosmetic Industry* that Gen X is a "highly engaged beauty consumer" that the beauty industry needs to pay closer attention to.

But there are reasons these older consumers are sometimes overlooked.

"Gen X is smaller in size, sandwiched between the bigger, more attention-grabbing boomers and millennials," said Jensen. "And with the current industry focus on the younger Gen Z and Gen Alpha, Gen X is pushed even further aside. But Gen X is a highly engaged beauty consumer that has grown their spend in beauty at a greater rate than any other generation. And in just four short years they will outnumber boomers. The beauty industry needs to start paying closer attention to this cohort."

"Subjects like eyebrows, concealer and skin care order are ones we see increased engagement on both Facebook and Instagram," Bethany Blair, senior director of content at Ipsy, told *Global Cosmetic Industry*. "Specifically, eyebrow content, whether it be a meme remembering the 90s brow or more educational content like how to fill in your brows after over-plucking, how to achieve a current trend, or suffering brow hair loss. We often see comments highlighting a feeling of being seen through this type of content."

Spate notes that older consumers are specifically concerned about the compatibility of makeup products for their aging skin. For this reason, Sephora has created a dedicated page highlighting makeup for mature skin.

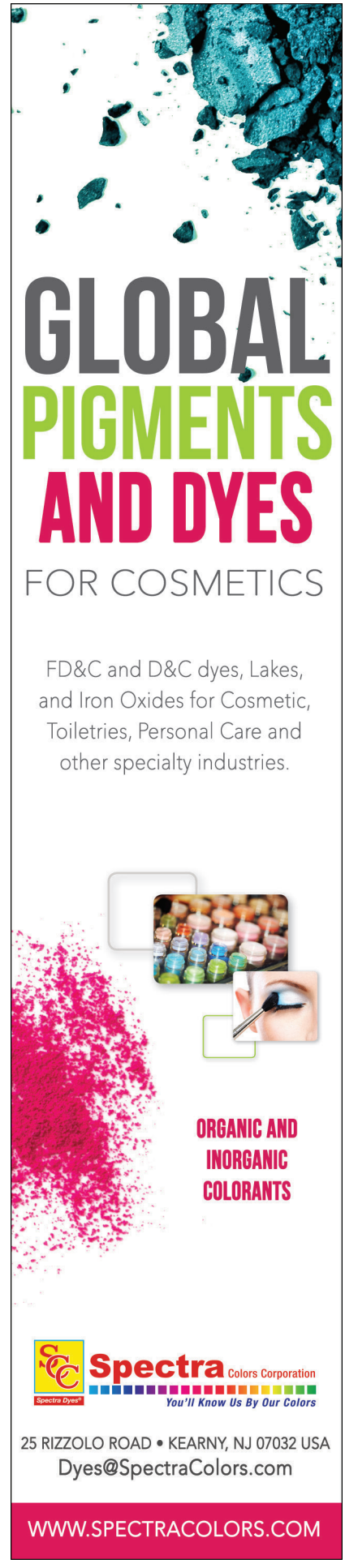
Featured products, all of which include testimonials from older shoppers, include:

- Urban Decay's All Nighter Extra Glow Dewy Setting Spray, which offers a more flattering alternative to matte looks;



Danessa Myricks Beauty's Yummy Skin Moisture Repair Balm Serum with Hyaluronic Acid and Squalane (pictured here with another SKU), was declared by one Sephora reviewer as "dry skin's bestie."

Courtesy of Danessa Myricks Beauty



- Laura Mercier's Real Flawless Weightless Perfecting Waterproof Foundation, which is prized for its lightweight and durable wear and features bamboo silk powders, vitamin E, camelia seed and cacao extract;
- Sarah Creal's Speak For Yourself Hydrating Lipstick, praised for its performance on mature dry skin and which comprises hydrating raspberry stem cell extract and lip barrier supporting grape extract;
- Bobbi Brown's Weightless Skin Oil-Controlling Foundation SPF 15 with Hyaluronic Acid, which is lightweight and reportedly avoids the sin of making fine lines and wrinkles stand out more than they do naturally;
- and Danessa Myricks Beauty's Yummy Skin Moisture Repair Balm Serum with Hyaluronic Acid and Squalane, declared by one Sephora reviewer as "dry skin's bestie."

"Brands should tap into this growing trend and offer products adapted to more mature skins," Spate recommends, "with an emphasis on how important textures, formulas and application techniques are."

Acne: A Cross-category Worry

Acne-centric searches offer a wide-ranging preoccupation across ages and product segments.

Per Spate, there has been a 1.3K jump in monthly Google searches for non-comedogenic makeup. It's no surprise, then that, in the same 12-month period, searches for "pimple" alongside makeup have increased by 1.9K.

For brands seeking to deploy hybrid formulations, it's worth noting that skin care search data mimics rising makeup acne queries. For instance, searches for pore control increased 5.2K per month, while queries for acne-safe skin care increased 1.5K.

Among top skin care concerns, "pimple" spiked a notable 16.2K per month, in addition to more specific searches such as "dry acne-prone" (up 2.3K per month), fungal acne (up 2.0K) and sebum (up 1.8K).



Per Spate, there has been a 1.3K jump in monthly Google searches for non-comedogenic makeup. It's no surprise, then that, in the same 12-month period, searches for "pimple" alongside makeup have increased by 1.9K.

A Desire for Radiance

In terms of product facets, shoppers are searching for products that offer highlighting and glowy effects. According to Spate, this reflects a "continued desire for radiant finishes, aligning with the desire for makeup that enhances one's appearance."

What's Next for Makeup?

The data clearly shows that brands seeking growth in the color cosmetic space will need to target emerging trends, while addressing the skin-centric concerns of mature and acne-prone consumers. This opens an opportunity both for novel products addressing the latest trends and hybrid formats that deliver the best of both worlds for every life stage. ■

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GETTING INTO THE MOOD: FRAGRANCE & BEAUTY

The Benchmarking Company queried more than 4,000 U.S. beauty and personal care consumers in November 2024 to understand their fragrance passions when buying skin care, hair care and fragrances.

BY DENISE HERICH, THE BENCHMARKING COMPANY



Savvy beauty brands are investing in R&D to delve into the scientific impact of different fragrances that affect mood, emotion, brain chemistry, and pleasure centers.

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Fragrance has always been an emotional catalyst that can drive sales; today, savvy beauty brands are investing in R&D to delve into the scientific impact of different fragrances that affect mood, emotion, brain chemistry and pleasure centers. The goal? A viral following of consumers who can't get enough of their brand's scents and the way they make them feel. To learn more, The Benchmarking Company queried more than 4,000 U.S. beauty and personal care consumers in November 2024 to understand their fragrance passions when buying skin care, hair care and fragrances.

The Psychology of Scent

Almost all consumers (99%) agree that fragrance can impact their mood, with 96% also agreeing that fragrance can evoke a strong emotional connection or memories. An equal number of consumers (96%) say that fragrance in beauty and personal care products enhances their emotional well-being.

Nearly three-quarters (70%) of buyers have tried essential oils and aromatherapy in the past or currently to reduce stress (86%), boost their mood (84%) and help improve sleep (70%).

Consumers admit that scents can elicit certain emotions, nostalgia, or core memories, as seen in **T-1**.

The female beauty buyer is looking to feel happy (60%), feminine (59%) and clean (57%) when wearing scented products, with males wanting to wear scents that make them feel clean (62%), masculine (42%) and happy (39%).

Purchase Habits & Influencers

Ninety-two percent of women and 90% of men say that when selecting scented products, the fragrance itself is important to very important in their purchasing decision. What's more, 84% say they will not buy a product with a fragrance they dislike, even if the product has proven benefits.

Female buyers are slightly more inclined to use scented beauty and personal care products daily, with 97% using fragranced bath products, 93% using fragranced body lotions or creams, 93% using fragranced shampoos/conditioners, 73% using fragranced facial skin care and 67% using fragranced SPF.

Sixty-six percent of women say they've purchased a perfume/parfum in the past 6 months; 65% have bought a fragranced body mist; 36% an eau de toilette; and 30% a cologne.

About two-thirds of buyers (65%) are fine with mixing different scents at the same time (i.e., perfume, scented lotions/deodorants), 54% actively try to match their fragrances to their moods and 52% we different scents for varying activities.

T-1. Top emotions evoked by scents

Females	Emotion/Memory	Males
70%	A happy time in my life	58%
55%	Reminds me of a family member/loved one	46%
49%	A specific season (holidays, summer, etc.)	39%
41%	Vacation	31%
34%	Childhood memories	26%

T-2. The prominent notes in consumers' fragrance wardrobes

Females	His & Her Fragrance Wardrobe – What They Wear		Males
52%	Floral (rose, jasmine, etc.)	Woodsy (cedar, balsam, etc.)	62%
38%	Fruity (apple, berries, etc.)	Animalist (musk, leather, etc.)	38%
37%	Gourmand (vanilla, coffee, etc.)	Aquatic (cascalone, coral, etc.)	32%
31%	Citrus (orange, lemon, etc.)	Spicy (cinnamon, pepper, etc.)	30%
26%	Clean (linen, laundry, etc.)	Citrus (orange, clementine, etc.)	27%

A breakdown of the prominent notes in consumers' fragrance wardrobes is presented in **T-2.**

Important Fragrance Facets

Wearing just the right fragrance can lead to an enhanced sense of well-being, with these factors rating as somewhat to very important:

- 84%: fragrance lasts all day on the skin/hair/body
- 76%: other people must find the fragrance attractive
- 60%: fragrance must be able to be enjoyed by others from 6 inches away

More than two-thirds (67%) of buyers are interested in fragrance and scented products that are designed for people with scent and/or skin sensitivities. ■



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

Want more from this author?

Check out ***How Beauty x Wellness Can Address Stressed-out Consumers*** *in our* ***September 2024 edition.***

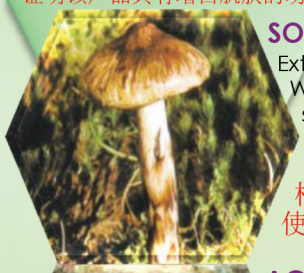


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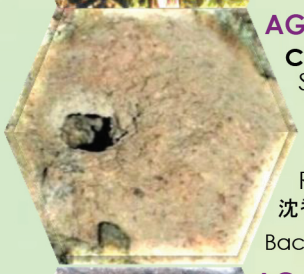
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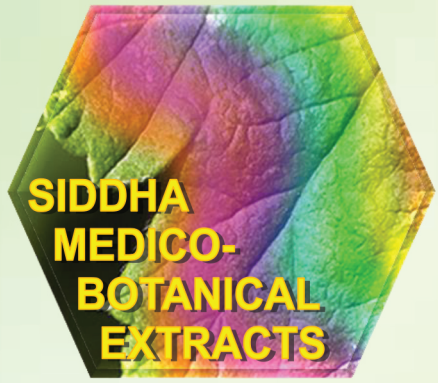
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通过使用欧盟-欧共体所认可的体外实验方法，证明该产品对人类安全无害。



Colorante-Naturel
天然色剂

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

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

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

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

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

CAMPO PLANTSERVATIVE WSr

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

CAMPO PLANTSERVATIVE WMr (Jojoba Oil)

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

CAMPO BOTANICALS® Multi-Purpose Cosmetic Base Chemicals & Active Ingredients
CAMPO BOTANICALS® Novel Functional Active Cosmetic Ingredients and Raw-Materials
Efficacious Skin Topical Multi-Functionalities Active Novelty Botanical Phyto-Vegetative Stem-Cells that never undergo aging process but immortally give rise to new specialized and unspecialized cells, with functional efficacies responsible for regeneration processes, into pluripotent status for topical cosmetics.
100% Natural Botanical High Purity Permanent Hair – Botanical Colors.
With 100% High Purity Siddha Medico Botanicals Extracts as Natural Color Ingredients and With 100% High Purity Campo Natural Botanical Additives to Prolong Hair Colors Effects,
For Botanical Permanent, For Botanical Demi-Permanent, For Botanical Semi-Permanent, For BotanicalTemporary

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ADVANCED BEAUTY INGREDIENTS & CUTTING EDGE CLAIMS

The beauty industry is at the forefront of innovation, advancing both sustainability and product performance through cutting-edge solutions. Key developments include AI-driven discoveries, plant-based ingredients, and preservative-free formulations.



From AI-driven discoveries to plant-based ingredients and preservative-free solutions, the beauty industry is innovating sustainability and product performance.

Next-level sustainable ingredients and production capabilities are boosting the eco-ethical profile of the beauty industry while fostering enhanced claims for product innovation across categories such as skin and hair care and color cosmetics. Here, we round up the latest innovations set to reshape products in the years to come.

Bringing Bio-based Ingredient Manufacturing In-house

The Estée Lauder Companies (ELC) has opened its BioTech Hub focused "exclusively on manufacturing cutting-edge bio-based raw materials," per the company. The site supports the company's broader pivot away from a reliance on biomass and natural resources, while ensuring business continuity.

Based near its campus in Oevel, Belgium, the site (led by Caroline Paulussen, Ph.D.) will manufacture active biomolecules from plant, yeast and bacteria sources to be applied in ELC skin care products across a range of brands.

In this way, the company seeks to boost the sustainability of its products, pivoting toward bio-based alternatives to traditional ingredients.

Image by HadK at Adobe Stock

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Commercial production will begin in 2025 and will allow ELC to boost its in-house production of bio-based raw materials.

The Belgium-based team will work with ELC researchers in Melville, New York to optimize fermentation and bio-based materials. Raw materials resulting from the project will be piloted and scaled up in cooperation with manufacturing teams in Belgium.

"Our prestige beauty products depend on the highest quality raw materials," says Roberto Canevari, executive vice president, global supply chain, ELC. "By producing our own biotechnology-based materials at one of our main manufacturing campuses, we are able to manufacture at-scale in a more responsible way. This is a great example of how our end-to-end value chain is partnering to advance innovation and sustainability across the enterprise."

"Our BioTech Hub will support our efforts to provide more responsible and cutting-edge beauty solutions to consumers," says Jamal Chamariq, senior vice president, EMEA UK&I and travel retail, global supply chain, ELC. "The location of the new center in Belgium also will enable us to partner more closely with leaders in biotechnology, further enhancing our innovation ecosystem in Europe and beyond."



Estée Lauder Companies launches its BioTech Hub in Belgium to produce sustainable bio-based raw materials for skin care.

Exosomes Deliver Anti-aging for the Face and Breasts

Mibelle Biochemistry is tapping into the exosome skin care boom with its dual-action plant-stem-cell-derived PhytoCellTec Exosomes.

The technology delivers exosomes to the epidermis and dermis topically while also stimulating the production of exosomes by mesenchymal stem cells within the skin itself.

The PhytoCellTec Exosomes (INCI: Lycium Barbarum Callus Culture Extract (and) Isomalt (and) Lecithin (and) Aqua/Water) support intercellular communication to improve the skin barrier (for better moisture retention and defense) and collagen production and to rejuvenate the skin (for greater density and elasticity) via interactions with fibroblasts, thereby counteracting age- and external-aggressor-triggered skin issues such as pollution and UV radiation.

The result is a reduced appearance of wrinkles and reshaping of contours of the face and breasts.

In our 2025 beauty trend preview, Mibelle Biochemistry's Christine Meier noted, "[Exosomal beauty is] 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 added, "I think this trend will be important, because these small



Mibelle Biochemistry introduces PhytoCellTec Exosomes, a dual-action plant-derived technology that boosts exosome production for better skin barrier function, collagen stimulation, and a rejuvenated appearance.

From top: Image by Robert; Rido at Adobe Stock

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."



Defensil-Pure Eco is a fermented millet extract designed for dry and atopic skin.

Fast-track Anti-aging Ingredient Discovery with AI

LVMH Recherche and LVMH's beauty R&D group is leveraging California-based Integrated Biosciences' AI and synthetic biology capabilities to fast-track the discovery of anti-aging skin care technologies. Financial terms of the partnership were not disclosed.

Integrated Biosciences pairs AI with optogenetics, the latter of which allows the company's researchers to control and monitor the biological function of individual cells, groups of cells, tissues and organs.

Combined, the company's deep learning models can "virtually screen hundreds of thousands of molecules" to identify chemical compounds with the most promise for modulating age-related biological phenotypes.

The company has already made a name for itself by using AI to identify novel senolytic compounds that clear out senescent cells.

"Our partnership with Integrated Biosciences perfectly embodies our vision: to expand the frontiers of scientific discovery, fueling transformative innovations in beauty," said Bruno Bavouzet, president of LVMH Recherche. "This represents a unique opportunity to evaluate thousands of potential bioactives concurrently, revolutionizing the pace of our research for the benefit of all our brands, among them our flagship–Maison Parfums Christian Dior. By combining our skin research expertise with their AI and aging research, we are taking a decisive step in understanding and molecularly addressing age-related cellular pathways."



LVMH partners with Integrated Biosciences to leverage AI and synthetic biology for advancing anti-aging skin care.

'Preservative-free,' Anti-inflammasome Skin Care

Beauty innovators continually face increasing restrictions on the preservative systems used in formulations. As such, Rahn Cosmetic Actives introduced a version of its renowned post-biotic active, Defensil-Pure Eco, that features pentylene glycol as a "mild, non-listed preservative." What's more, the ingredient has been shown to counteract the activation of the skin's inflammasome, and to "regenerate the skin immediately after just one application."

From top: Image by Olga Shefer; Syda Productions at Adobe Stock

Defensil Pure-Eco: Millet Ferment, Barrier Strengthener

Defensil Pure-Eco (INCI: Water (Aqua) (and) Pentylene Glycol (and) Panicum Miliaceum (Millet) Seed Extract (and) Lactobacillus Ferment) is a water-based, fermented millet extract. Designed for especially dry skin, it reportedly hydrates and strengthens the skin barrier immediately after application.

According to the company, dry and atopic skin suffers regularly from physical damage and a weakened barrier. This makes the skin vulnerable to bacteria entering the deeper layers, which can cause adverse inflammatory reactions by activating the inflammasome.

Clinical studies have shown that Defensil-Pure Eco can protect dry and atopic skin against further damage by quickly regenerating skin and "resealing" the barrier, per Rahn.

Pre/Postbiotic to Inhibit Inflammasome Activation

Also, per the company, in vitro, Defensil-Pure Eco serves as a prebiotic, promoting the growth of beneficial bacteria on skin to displace undesirable microorganisms.

Its postbiotic output is also said to effectively inhibit the activation of the inflammasome. Indeed, an analysis of the fermented millet extract reportedly showed that fermentation results in a greater release of important minerals, compared with standard millet extract.

Scientifically Backed Beauty Claims

Taken together, Defensil-Pure Eco has been scientifically substantiated, at 0.5-3.0%, to back claims such as:

- Immediately regenerates skin after a single application
- Increases skin hydration by 142%
- Strengthens the skin barrier by 79%
- Improves the appearance of atopic skin
- Promotes a healthy skin microbiota
- Reduces inflammatory reactions

Dimethicone-like Plant-derived Oil

Vistanol GDHR-Pure (INCI: Glyceryl Diisostearate/Hydrogenated Rosinate) is a 100% plant-derived oil. According to the company, it is highly stable against oxidation, has a low viscosity and excellent spreadability, and demonstrates good adherence to skin. In addition, it is compatible with silicone oil and imparts minimal color and odor.

Vistanol GDHR-Pure Benefits in Skin, Hair and Makeup

Per the company, benefits in skin, hair and makeup include:

- Imparting lanolin-like gloss and emollience
- Imparting dimethicone-like texture at low use levels
- Improving hair smoothness and shine
- Delivering a moisturizing texture to hair, among others

Emulsifier Selector Tool with Texture-first Focus

Sharon Personal Care has developed a novel Emulsifier Selector tool that puts sensorial texture first in the formulator's path to identifying the ideal emulsifier for given formulations. The tool was presented during the SCC Annual Scientific Meeting and Technology Showcase..

As the company explained, the emulsifier is the dominant ingredient that determines the sensory profile of emulsions, especially in terms of appearance, pick-up and rub-out. To make the selection process easier, the Sharon Emulsifier Selector tool takes a top-down approach to guide the formulator along the way.

Simple 1, 2, 3 Emulsifier Selection

As noted, the tool aims to streamline the process, saving time and cost. Thus, the formulator simply:

- Chooses the sensorial texture desired, which narrows the emulsifier options from a comprehensive palette of 15 unique bases with various sensory experiences to just 3-5.
- Review these 3-5 textures to identify the top 1 or 2 choices.
- Receives recommendations for the emulsifiers that align with these top choices to create the desired textures.
- From there, the formulator uses the chosen emulsifier, fine tuning the formula to meet the product brief.



Vistanol GDHR-Pure is claimed to be highly stable against oxidation, has a low viscosity and excellent spreadability, and demonstrates good adherence to skin.

Image by Anton Pukhov at Adobe Stock

Selecting Desired Aesthetics

Key to the Sharon Emulsifier Selector are the desired product aesthetics and forms. For example, one might choose a cream, lotion or serum, with fast absorption, a rich texture, etc.

The company adds that the chosen emulsifiers are offered with a range of specs and strengths, which are important formulating considerations.



The Emulsifier Selector tool puts sensorial texture first in the formulator's path to help them identify the ideal emulsifier for given formulations.

Synthesized, Cruelty-free Snail Mucin Could Be Coming

Snail mucin or slime has been the beauty industry's star for several years, thanks to its known hydrating, plumping and skin-smoothing benefits, among others. In 2018, the market for snail beauty products was projected to grow at a CAGR of 10.82% between 2017 and 2025. In February 2024, Spate reported snail mucin was one of the top two skin care trends, growing more than 300% year-over-year. Notably, the material has also been used as a strong biomedical adhesive, to heal wounds, and even to assist anti-cancer treatments.[1]

Toward Cruelty-free Snail Mucin

However, creating this material can stress the animals even when reputable producers use practices to minimize their discomfort. This is one reason why Marie Wei, a senior in molecular biology at Johns Hopkins' Krieger School, and Cecelia Zhang, a biomedical engineering senior at the Whiting School, aim to synthetically produce what they consider the key protein in snail mucus, epiphragmin, according to a university report.[2]

[1] https://jitc.bmj.com/content/11/Suppl_1/A948

[2] https://www.bme.jhu.edu/news-events/news/artificial-snail-mucus-could-advance-cancer-treatments/



Snail mucin or slime has been the beauty industry's star for several years, thanks to its known hydrating, plumping and skin-smoothing benefits.

Underlying Structure, Mechanisms of Snail Mucin?

The duo has been working on their "AminoArtisans" project since 2022, with initial funding through the AgaraBio community lab and a grant from the Whiting School of Engineering's Student Initiatives Fund. "Researchers have been putting raw mucus into cancer cells and seeing them metastasize slower," Wei said in the report, "but they've never actually understood what's happening on a molecular level."

Per Wei, there is little research to explain why snail mucin works. A recent paper, "Snail mucus: Unlocking a natural powerhouse for dermatological innovation,"[3] published in December 2024, could elucidate answers, although no abstract was readily available to provide details.

A paper in December 2021[4] described a study in which human NHDF fibroblast cells were exposed to snail slime at two different concentrations, and the biological

[3] https://pubmed.ncbi.nlm.nih.gov/39673555/

[4] https://www.researchgate.net/publication/359361920_Snail_mucus_-_a_natural_origin_substance_with_potential_use_in_medicine

From top: Image by Praiwan Wasanruk; Olga Kan at Adobe Stock

activity of the cells was assessed via mitochondrial redox. Analysis of the mucus sample was also carried out using infrared spectroscopy.

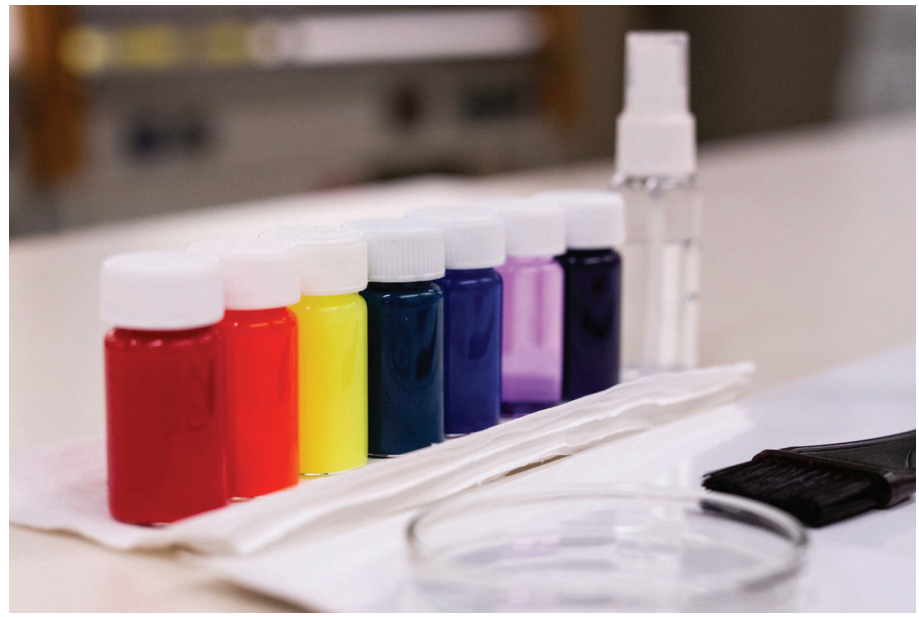
The authors found:

- The snail mucin contained mucin, achacin, mitomycin and allantoin, among other compounds.
- The snail mucin positively affected the viability of fibroblasts, although the mechanisms for such were not clear.
- Discovering these underlying mechanisms is one aspiration of Wei's and Zhang's research.

Streamlining Production for Beauty and More

According to Johns Hopkins, once Wei and Zhang understand the molecular mechanisms, the researchers hope to engineer epiphragmin through a synthetic process, which will streamline its production.

Then, they expect to make it available to skin care manufacturers and for medical drug research. They also plan to engineer it to be a stronger, more useful substance; e.g., enhancing certain features through protein mutagenesis or gene mutation to make it more adhesive, or to target specific cancer cells.

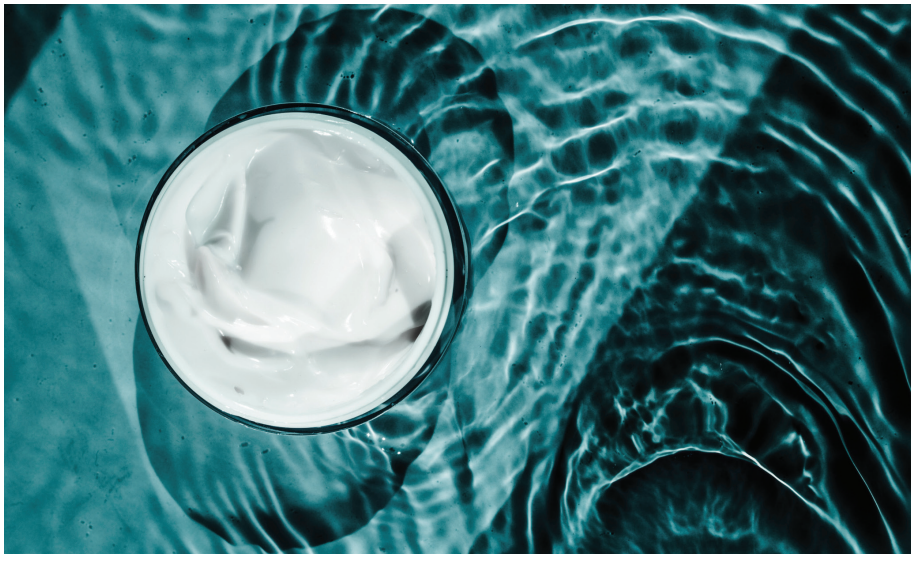


Vividye's innovative pigments offer vibrant color without the environmental impact.

Water-soluble HPR Vitamin A/ Retinol Derivative

Soho Aneco Chemicals Co., Ltd., recently developed a water soluble hydroxypinacolone retinoate (HPR) using co-solvency. Known as AC-HPR-W2 SACOS, the ingredient launched at in-cosmetics Asia in November 2024.

The new ingredient comes after the company's 2019 introductions of AC-HPR (a powder with high purity, up to 99%) and AC-HPR-S10 (a 10% oil soluble HPR). Per the company, HPR is a new-generation, direct-acting retinol and one of the most bioavailable forms of vitamin A — for which the company was granted an invention patent.



AC-HPR-W2 SACOS is a 2% water soluble HPR that is said to "solve the application problem of HPR in aqueous systems."

Stabler, Milder, Water Soluble HPR

HPR (INCI: Hydroxypinacolone Retinoate) is synthesized from retinoic acid and small molecule pinacol. According to the company, it is milder and more stable than other forms of vitamin A. The latest edition, AC-HPR-W2 SACOS, is a 2% water soluble HPR said to "solve the application problem of HPR in aqueous systems."

"We use two or more mixed solvents to improve the solubility of some insoluble ingredients," the company explained. "When each solvent in the mixed solution reaches a certain proportion, the solubility of the ingredient will reach a maximum. [This] can improve the solubility and bioavailability of HPR."

According to the company, HPR has been expanding in market share for anti-aging applications and is "likely to replace [the] vitamin A that is widely used."

From top: Image by Vividye; Anneleven at Adobe Stock

Clinical Safety, Stability of HPR

A series of clinical data is said to support the efficacy of Soho Aneco's HPR. Safety and stability testing were also carried out.

Results indicated the HPR:

- Non-irritating
- High purity
- Shows enhanced activity
- Low molecular weight and easily absorbed

Eco-conscious Textile Pigments for Cosmetics

Vividye, a Swedish deep-tech startup, is adapting its environmentally friendly textile dyes to cosmetics. According to the company, unlike traditional dyes, whose small molecules penetrate materials, Vividye's functionalized pigments are larger particles designed to adhere to surfaces without dissolving in water.

"Traditionally, modifying the characteristics of pigments has involved coating them in polymer films, essentially plastics," the company website explains. "Our technology eliminates the need for plastics, resulting in a completely plastic-free solution."

Per the company, the heart of its technology lies in a fusion of "groundbreaking" surface chemistry and precision engineering. "We specialize in meticulously modifying pigment properties, tailoring them to meet specific application needs. This involves enhancing characteristics such as color intensity, durability and versatility, revolutionizing the way pigments are utilized," the company website states.

Safer, More Sustainable Pigments

Per the company, the pigments' larger size makes them:

- Safer, so as not to penetrate skin and hair.
- Easier to filter from water, reducing potential health and environmental risks.

The technology is also adaptable, offering a way to create vibrant and long-lasting colors across applications such as hair coloring, makeup and lipstick.

Furthermore, unlike conventional pigments derived from rare minerals or fossil-based and synthetic (posing sustainability and ethical issues), Vividye's technology uses "abundant, non-fossil-based materials that are readily available and do not require extracting pigments from conflict zones."

Transferring from Textiles to Cosmetics

Since its founding in 2020, Vividye has focused on developing coloring methods that minimize harm to people and the planet. Initially focusing on textiles, the company has gained recognition for its innovations, including receiving the H&M & Elle Conscious Award.

"Moving into cosmetics felt like a natural next step," said Johanna Nissén Karlsson, CEO of Vividye. "The cosmetics industry faces distinct challenges, including stringent regulatory demands and high consumer expectations for product safety and environmental sustainability. Our technology offers a better alternative to traditional dyes, and we've seen a growing need for this in products that people use on their skin and hair..."

"Vividye's approach to sustainable coloring is both innovative and practical," adds Pontus Ottosson, CEO and head of investment at Chalmers Ventures. "Expanding into cosmetics shows their ability to adapt and meet the needs of different industries. We're proud to support them as they take this next step."



Explore the science behind Vividye's new pigments: a fusion of surface chemistry and precision engineering.

Image by Vividye at Adobe Stock

Sustainability & Ethical Sourcing

Upcycled Fatty Acids from Potato Juice

Amsterdam-based ChainCraft, an expert in the production of circular chemicals, and Royal Avebe, a

leader in potato-based starch and protein innovations, announced a collaboration to convert Avebe's residual potato juice into high-value circular fatty acids using ChainCraft's fermentation technology.

Fermentation Powers Sustainable Beauty Innovation

Per the companies, the technology enables the use of organic waste streams as a replacement for fossil feedstocks and palm oil as a raw material, to contribute to a lower CO_2 footprint and preserve biodiversity by preventing deforestation. This, in turn, supports manufacturers of specialty chemicals, flavors, fragrances and others to meet their climate goals.

David Fousert, CEO at Avebe, commented, " ...[T]his collaboration ensures more circularity and also saves energy. It contributes to the further creation of efficient production processes. ... For the northern part of the Netherlands, this collaboration means a more sustainable agricultural sector and region. And it also contributes to more employment opportunities in the north."



Potatoes contain catecholase and kojic acid, which are natural compounds that can help inhibit melanin production.

Carbon Trust Verifies BASF's Lower Carbon Footprint HDO Intermediate

The Carbon Trust, a global climate consultancy, has verified that four BASF intermediate products have a demonstrably lower cradle-to-gate product carbon footprint (PCF) than the market average for fossil-based equivalent products. These ingredients have earned the Carbon Trust label and Lower than Market claim.



BASF's innovative production methods lead to lower carbon footprint intermediates.

Carbon Trust Verified BASF Intermediates

Verified ingredients include:

- 1,6-hexanediol (HDO), used in the production of cosmetics as well as industrial coatings, polyurethanes and adhesives. Per BASF, HDO gives end products flexibility, adhesion properties and weather resistance.
- Formic acid (FA), used to preserve animal feed, ensure efficient coagulation during latex extraction, etc.
- Propionic acid (PA), used in animal feed to extend shelf life and used in the production of pharmaceuticals, pesticides, solvents and plastics.
- Neopentyl glycol (NPG), used to produce polyester and alkyd resins.

According to BASF, the verification for HDO is valid until May 2026.

Identical Efficacy, Green Transformation Plus Transparency

According to BASF, these products are identical to standard products

From top: Image by Krakenimages.com; Maryna Osadcha at Adobe Stock

in terms of quality and properties, meaning they are "drop-in" solutions for customers. This will allow users to easily and efficiently reduce CO_2 emissions from purchased goods or services.

"We are proud of the verification because it reflects our strong commitment to support our customers' green transformation, as stated in BASF's recently announced 'Winning Ways' Strategy..." remarked Ketan Joshi, president of BASF's intermediates division.

Veronika Thieme, associate director of the Carbon Trust, added: "As customer awareness about the environmental impact of their product choices grows within the chemical industry, there is an increasing demand for transparency. When BASF customers encounter the Carbon Trust verification and label, they can be confident that these verified products have undergone a rigorous process to demonstrate a lower carbon footprint..."

Biodegradable Soltellus Polymers

Lygos, Inc., has partnered with Acme-Hardesty to offer Lygos' Soltellus line of biodegradable, water-soluble polymers in the personal care and home care markets.

Sustainability and High Performance

The Soltellus (INCI: Sodium Polyaspartate) ingredient range is reportedly designed to meet the growing demand for sustainable products. They are also engineered to deliver high performance for applications including:

- Hair care, to enhance softness, smoothness, shine and wet combability, resulting in healthy looking hair.
- Cleansing, to ensure a stable, rich, creamy foam and lather that is easy to spread, providing the deeper, more thorough removal of dirt, oil and impurities.
- Emulsions, to improve the user experience with smoother application and luxurious after-feel, preserving formulation quality while leaving skin hydrated.



Polymers are crucial in skin and hair care products but can be very harmful to the environment, especially if they break down into microplastics.

Broader Reach, More Sustainable Options

Rich Weber, chief business officer of Lygos, said: "We are excited to partner with [Acme-Hardesty] to reach a broader customer base, accelerate market penetration, and drive the adoption of high-performing, sustainable solutions."

Caren Dres-Hajeski, senior vice president of personal care and marketing at Acme-Hardesty, added: "This collaboration allows us to offer even more sustainable options to the personal care and home care markets, helping our customers create products that are both effective and environmentally friendly."

Hair Health Boosters

Elevance Ultra, a Next-gen Hair Fixative/Pigment Dispersant

To address the global demand for ingredients with high performance and enhanced safety and sustainability profiles, Advancion Corp. (formerly Angus Chemical Co.) has launched several multifunctional additives for various industries based on its novel aminoamyl alcohol technology platform.

For personal care and cosmetics, the Elevance Ultra (INCI: Amino Methylisobutanol) technology is said to:

- Provide superior hair fixative resin performance
- Provide powerful pigment dispersion
- Act as a high-efficiency stabilizer and neutralizer
- Enhance the performance and sensory quality of formulations, including high-alcohol and hand-sanitizing gels
- Be compatible with a wide range of commonly used natural and synthetic formulating ingredients, supporting cleaner and more effective personal care products

Biodegradable, Multifunctional Elevance Ultra

Elevance Ultra is described as readily biodegradable, with an excellent safety profile. Per the company, the ingredient is the only stand-alone technology on the market that outperforms AMP across a range of applications.

Image by Blackday at Adobe Stock

In hair styling, it is not only compatible with various hair fixative resins and hair spray propellants, supporting their performance, it also provides in-can corrosion protection and superior curl retention in high-humidity conditions, the company reports. The ingredient is available as an anhydrous solid (Elevance Ultra 1000), or as an aqueous solution at concentrations of 95% (Elevance Ultra 2000) or 89% (Elevance Ultra 3000).

Powerful and Versatile Formulation Innovation

"This innovation embodies our dedication to pushing the boundaries of what's possible, offering the market powerful, versatile and environmentally responsible solutions for today's complex formulation challenges," said Kathleen Havelka, Ph.D., senior vice president of research, development and applications.

"Our next-generation formulating ingredients were designed to deliver the qualities and performance formulators rely on for dependable and superior results, while meeting increasingly stringent safety and regulatory standards across personal care, coatings, metalworking fluids, electronics and other essential end-use applications."

David Neuberger, president and chief executive officer, added, "... Advancion's new multifunctional additive platform was specifically engineered to deliver performance exceeding that of AMP (aminomethyl propanol) in formulations across all known market applications, while simultaneously providing a best-in-class safety and toxicity profile.

CapilAcid Hair Protector, Oleobiota Sebum Normalizer

Evonik has expanded its natural actives portfolio with two botanical-based ingredients: CapilAcid for hair protection and Oleobiota for sebum control. The company recently highlighted these ingredients, which originated from Evonik's acquisition of Novachem, as they are integrated into Evonik's care solutions business.

Hair Defense & a Sebum NormalizerCapilAcid Antioxidant for Exposome Protection, Healthy Hair

CapilAcid (INCI: Water (Aqua) (and) Glycerin (and) Aristotelia Chilensis Fruit Extract) is derived from the maqui fruit, also known as Chilean wineberry. The ingredient serves as a "comprehensive protector from the root to the tip of the



hair and is a powerful antioxidant," the company reports.

The product excels in acidic formulations, safeguarding hair against exosome-induced stress and promoting overall hair health.

Oleobiota Skin Sebum Normalizer, Pore Minimizer

Oleobiota (INCI: Water (Aqua) (and) Glycerin (and) Eugenia Uniflora Leaf Extract) is reported sourced sustainably from Ñangapirí leaves in the Misiones rainforest. It can be used to regulate sebum and mattify combination and oily skin while minimizing the appearance of pores.

According to the company, the ingredient was developed in accordance with the Nagoya Protocol to support biodiversity.

Enabling Sustainability Through Biosolutions

Evonik underscores that its botanicals and natural actives segment is important in expanding the company's portfolio of biosolutions. By translating the phytochemical profile of plants into skin and hair care benefits, Evonik supports customers to meet demands for sustainable, scientifically substantiated beauty and personal care products.

Ute Schick, head of the care solutions business at Evonik, stated, "Novachem has enabled us to elevate our offerings, and deliver even more unique sustainable solutions to our customers." ■



Advancion Corp. has launched several multifunctional additives for various industries based on its novel aminoamyl alcohol technology platform.



Oleobiota can be used to regulate sebum and to mattify combination and oily skin while minimizing the appearance of pores.



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Allured business media



Premiumization was one of the 10 megatrends shaping consumer habits over the last year, which has resulted in greater consumer interest in beauty tech.

Image by Lightfield Studios at Adobe Stock

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WHAT'S DRIVING THE BEAUTY DEVICE BOOM?

How new beauty tech devices can allow for more sophisticated personalization for consumers as the demand for salon results at home continues to increase.

BY EMILIE HOOD, consultant, beauty and fashion Euromonitor International



Premiumization was one of the 10 megatrends shaping consumer habits over the last year. In the beauty and personal care space, this is materializing through greater consumer interest in beauty tech, which is an umbrella term for the digital tools and devices that improve beauty-related experiences and routines, covering anything from hair straighteners to AI enabled cosmetic try-ons. These devices will allow for more sophisticated personalization for beauty consumers as they continue to seek salon results at home. Here, we look at usage patterns, light therapy, at-home results and more.

Beauty Tech Usage of Niche Devices has Increased

Since the COVID-19 pandemic, consumers have placed increasing importance on self-care, driven by conversations around the importance of holistic health and greater willingness to invest in products that benefit mental and physical well-being.

An uptick in usage has been true among niche devices that were outside the most used devices like hair stylers and hair removal devices, heated eyelash curlers and microdermabrasion devices.

Light Therapy Innovations Gain Traction

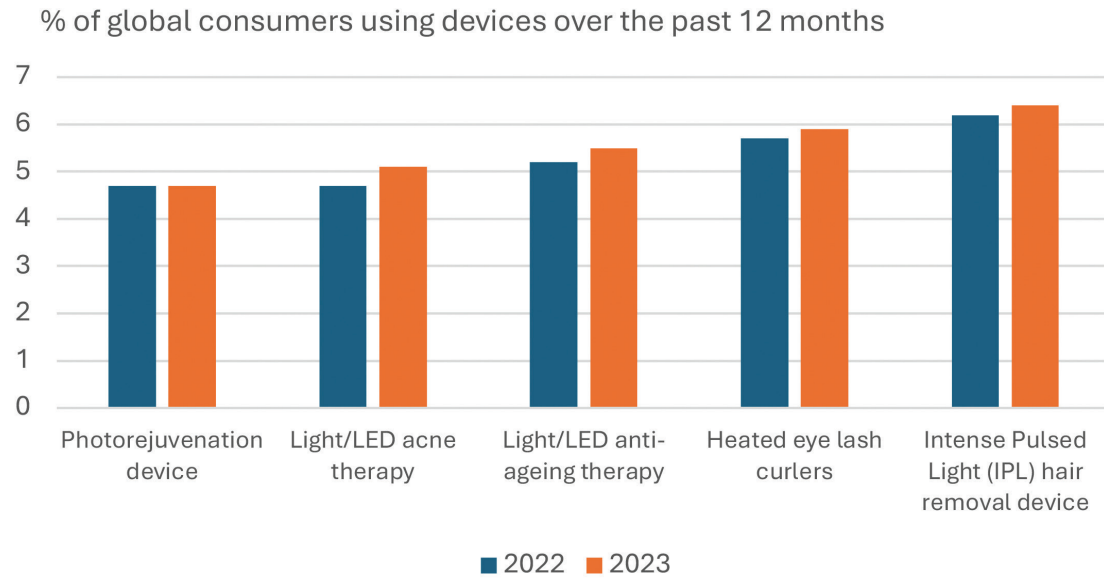
Initially only available for aestheticians, UV masks and handheld devices have grown in popularity because consumers want to recreate their effects at home.

Social media trends like "get ready with me" and influencers' discussions of the types of products/treatments they are using are making non-users more aware of the benefits of UV and light therapy.

As a result, more products have launched, leading to more accessible versions and higher mainstream usage **(F-1)**.

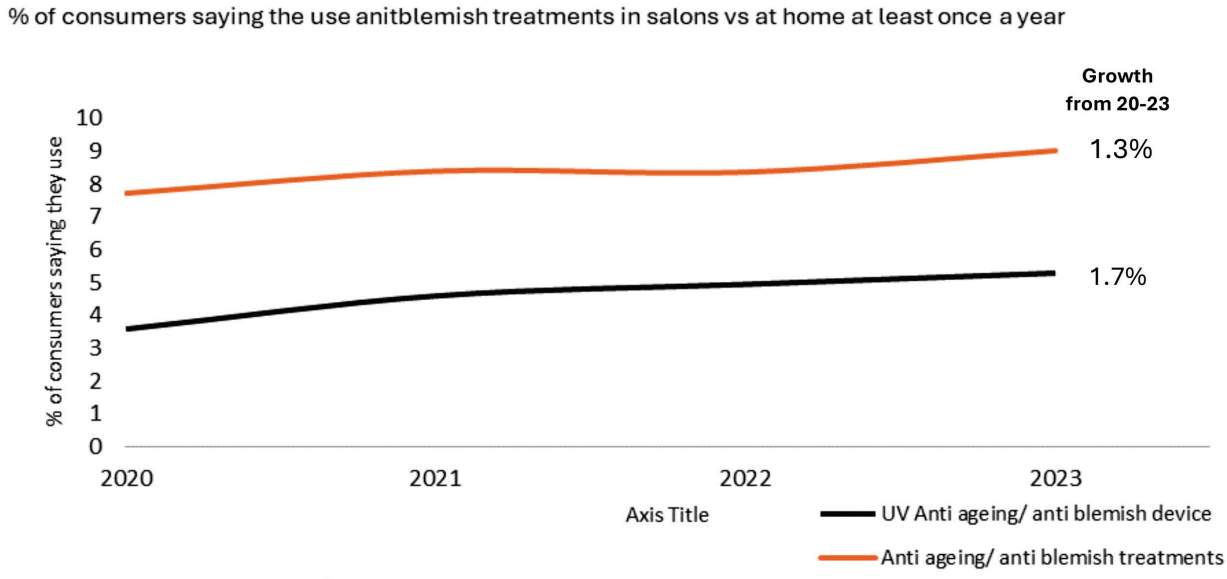
There is a correlation between the number of consumers looking to salon treatments and those using UV masks and handheld devices; the most likely to adopt potentially costly beauty tech are

F-1 Growth in beauty device usage (2022-2023)



Source: Euromonitor International: Voice of the Consumer, Beauty, fielded June-July 2023

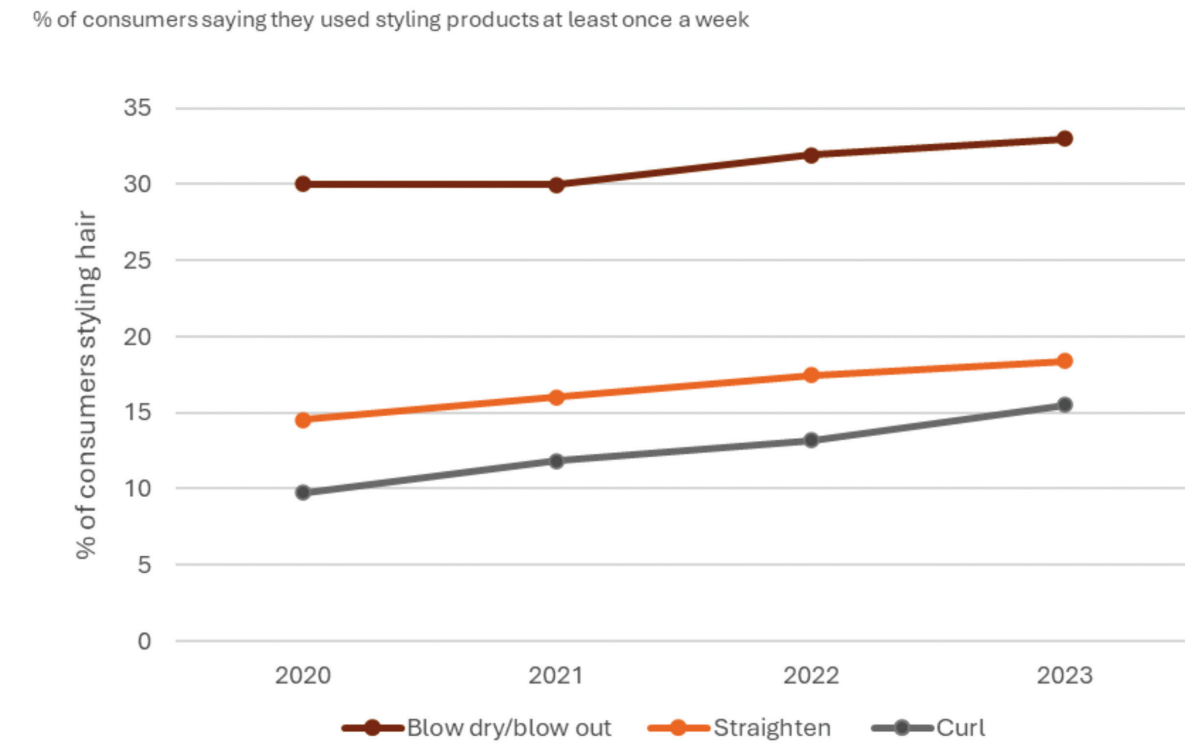
F-2 At-home skin care treatments (at home, versus salons)



Source: Euromonitor International

Courtesy of Euromonitor International

F-3 Usage of hair styling products globally



Source: Euromonitor International

those who have tried similar products and benefitted from the results.

As consumers understand the devices used in treatments better with use, they are more likely to try and replicate the effects at home between treatments.

And, as consumers look to save money, they may prolong the time between expensive salon treatments **(F-2)**—if they are able to maintain some of the benefits at home by using products (like the UV devices) at home for a lower cost per use.

The Promise of Salon Results at Home

Multifunctionality and benefits for hair health have become key factors in consumers purchasing decisions, since consumers are more conscious about maintaining the natural quality of their hair.

The pandemic also forced consumers who preferred to have salon treatments to reconsider at-home alternatives—accelerating brands' development into beauty tech.

First and foremost, consumers prioritize efficacy. While science and innovation are the common denominators when looking at popular launches, consumer interest is garnered through the perceived effectiveness products have.

In many cases, efficacy is measured by the results compared to professional treatments. Beauty tech products often boast the ability to provide more specialized results compared to standard products, whether that be enabling consumers to personalize their routines or products, or recreating salon professional effects at home **(F-3)**.

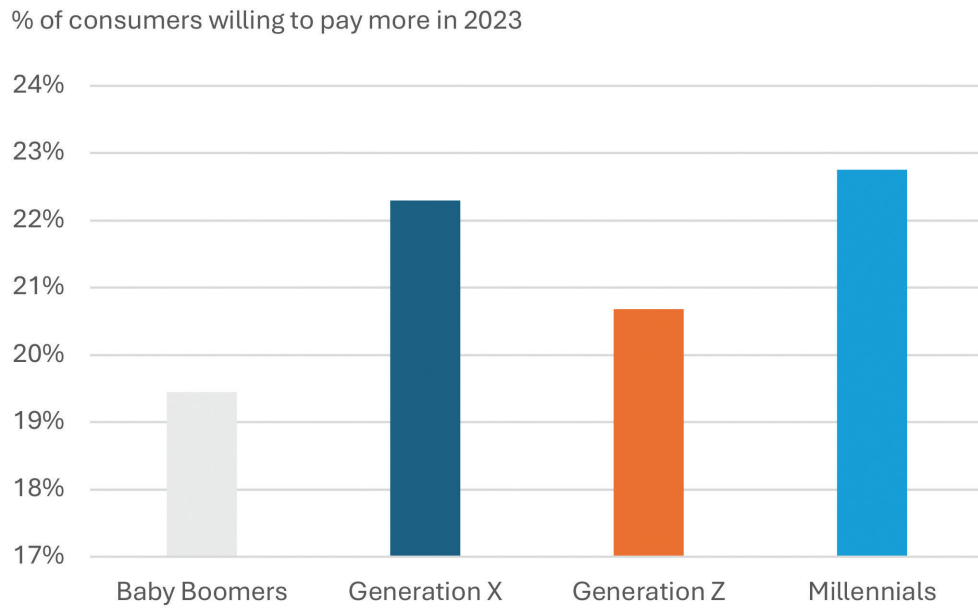
One of the most significant beauty tech launches illustrating this shift has been the Dyson Airwrap, launched in 2018. The Dyson brand is generally associated with quality and efficacy, thanks to its focus on the engineering and design of appliances and electronics.

While hair care at first may not seem like an obvious area for Dyson, the Coanda technology underpinning the Dyson Airwrap was developed from knowledge gained through the company's existing portfolio of vacuum cleaners, fans and purifiers. Dyson's reputation encouraged consumers to consider this new product, despite the high price tag relative to similar alternatives.

The promise of salon results at home, multifunctionality through different attachments, and the

Courtesy of Euromonitor International

F-4 Willingness to pay more for personalized products based on detailed skin/hair diagnosis



Source: Euromonitor International



The Dyson AirWrap has changed the game for consumers looking to achieve salon-like results from home.

From top: Courtesy of Euromonitor International; Image by руслан малыш at Adobe Stock



The Lesielle System is the first device that allows consumers to produce fresh skin care products on demand.

benefits for the health of hair long term, have solidified the popularity of this type of hair styler. Since the Dyson introduction, competitors like Shark and BaByliss have launched similar products, providing alternative options for consumers with a more strict budget.

Diagnostics to Form the Next Frontier of At-Home Beauty

Over the next five years consumers will continue to prioritize wellness and health as a core value within beauty and personal care. As we see the global economic situation stabilize, consumers will maintain their focus on premiumization and self-care, spending more on long term solutions **(F-4)**. As the beauty consumers keep building their knowledge of skin and hair care, they continue to look to the "next best thing." As it becomes more common to use beauty tech at home, devices will move towards ever more personalized solutions. Tech aiming for personalization is only starting to enter the consumer space.

An example of this is Lesielle's S Device. The device creates an all-in-one skin care product, based on an AI enabled quiz users complete through an app allowing consumers to adjust their routine on demand. The questions aim to uncover the standard skin care concerns and what consumers want to achieve. The device combines a moisturizing base, with a combination of actives prechosen by an introductory quiz in the app. The device can be shared between multiple people in a household- personalizing the formulas based on the individual's data.

Devices allowing more sophisticated personalization will become more commonplace, with consumers continuing to look to technology for results. The level of personalization, ownership and interaction enabled by tech will become a must have for many consumers, who want tangible results for their investment.

At Euromonitor, we are seeing consistent growth in the number of beauty consumers willing to spend on beauty and personal care, growing 29% globally from 2020 to 2023 (Euromonitor International, economies and consumers data, personal care expenditure in constant terms). Over the next few years, we expect to see consumers looking for new ways to satisfy their need for indulgence and efficacy. Beauty devices popularity has gained particular traction through consumers' willingness to invest, and as new products enter the markets there will be continued growth in the beauty technology space. ■

Courtesy of Leisielle

BEAUTY PACKAGING TRENDS: FRAGRANCE, PERSONAL CARE & MORE

Discover the latest packaging trends shaping the beauty industry, from sustainable materials and refillable systems to innovative designs that can help brands support the consumer experience.



The wide range of packaging launches introduced in beauty each year requires monthly updates of the latest innovations.

Image by fotofabrika at Adobe Stock

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Each month, *Global Cosmetic Industry* rounds up the latest cosmetic packaging launches and news, offering an overview of key trends shaping the market. This month's edition covers standout deco, a polyoxymethylene-free pump and a pump designed for a refillable experience.

Premium Label & Packaging Solutions Honored with Silver Award

Premium Label & Packaging Solutions (PLPS) was awarded Silver at the 44th Annual Package of the Year Awards in the Health & Beauty/ Personal Care category. The winning package was produced with Devoted Creations for its Vault Tanning Bronzer.

The design team at Devoted Creations drew inspiration from the product's name and its benefits, aiming "to unlock the darkest color possible."

This concept was brought to life by mimicking a bank vault, featuring silver tones and 3D embellishments replicating a door and lock.

PLPS produced a multi-dimensional silver shrink sleeve that fits the uniquely shaped container and closure.

The sleeve exemplifies 2024's "pattern" packaging trend by using a herringbone and repeat pyramid pattern that tricks the eye into perceiving texture where none exists. This effect was achieved by strategically applying silver cold foil alongside black, white, and silver inks, per the brand.

Leslie Gurland, VP of sales and marketing at PLPS, says, "The designers at Devoted Creations are some of the best we've had the pleasure of working with. We love being challenged by their out-of-the-box, intricate label and shrink sleeve designs, and we have won numerous industry awards for our work with them."

Guerlain Taps Aptar Pumps for L'Art & La Matière

Guerlain has partnered with Aptar Beauty to incorporate the supplier's Sensea fragrance pump and GSA pump into the brand's L'Art et la Matière collection.

Sensea Fragrance Pump

The technology used to create the Sensea pump is manufactured and assembled in France and delivers several key benefits:

- The Sensea pump boasts a smooth, gentle actuation, ensuring a fine, even mist dispersed at a 60-degree angle.
- All Sensea pumps in the collection are screw-on for easy reloading, promoting sustainability.
- The pumps and collars feature a sophisticated gold anodized finish, complemented by Guerlain's double G monogram engraved on the actuator.
- L'Art & La Matière fragrances offer in-store refills, while the travel spray allows for convenient home refills.

GSA Pump: Enhancing Personal Care Products

Aptar Beauty's GSA dispensing pump elevates the collection's hand and body lotions and soaps. This pump, crafted in Italy, includes several features:



Vault Tanning Bronzer



Sensea Fragrance Pump from Guerlain's L'Art et la Matière collection

L to R: Courtesy of Premium Label & Packaging Solutions (PLPS); Guerlain

- Robust technology ensures smooth, high-performance operation, per the brand.
- A metal-free pathway safeguards the integrity of the product's formula.
- The screw-on design with a twist-to-lock mechanism facilitates easy refilling
- The gold anodized collar aligns perfectly with the collection's luxurious aesthetic.

Sleek, Sustainable Aluminum Cosmetic Packaging

Harmony Luxe Trimline Lipstick

Monomaterial aluminum packaging is becoming increasingly popular in the beauty industry for its sustainability, durability and premium aesthetic. HCP's Harmony Luxe Trimline Lipstick exemplifies this trend, offering a fast-to-market stock solution with an 11 mm cup and guided mechanism, ideal for soft formulas that blend sheer color with nourishing ingredients.

As eco-friendly solutions gain priority, aluminum's infinitely recyclable nature makes it an attractive choice. Its use as a single material streamlines its recycling potential, reduces contamination and improves material recovery efficiency, per HCP.

Beyond sustainability, aluminum provides exceptional durability, ensuring that beauty products remain protected and pristine, delivering a high-end experience from first use to last.

Aluminum's versatility in design adds to the appeal of the 'Harmony Luxe Trimline Lipstick.' It can be anodized in various finishes and colors, with intricate designs achieved through techniques like laser etching, embossing and double-anodizing.

The cool, metallic feel of aluminum conveys luxury and quality, enhancing brand perception and consumer engagement in a market where aesthetics are paramount.

Aluminum-Clad Mascara Packaging

The Fantasy Eyes collection showcases HCP's aluminum-clad mascara packaging portfolio, each item paired with either a fiber or precision-molded brush that allows consumers to craft a popular beauty look for lashes or brows.

The cool touch of aluminum-clad mascara packaging can offer brands an elegant yet durable cosmetic packaging solution, HCP argues, exuding a sense of refined sophistication.

This material provides a strong protective casing but also an ultra-modern, high-end aesthetic that resonates with the discerning consumer. With the option to add weight, the substantial feel of the pack in the hand is a subtle yet powerful reminder of the quality and care invested in the product, per HCP.

Beyond its luxurious appeal, aluminum offers endless possibilities for decoration and customization.



Lisa Eldridge's Rouge Experience Refillable Lipstick



Harmony Luxe Trimline Lipstick



Aluminum-Clad Mascara Packaging

Courtesy of HCP Packaging

Whether it's through sleek embossing, intricate patterns, or a polished mirror finish, aluminum-clad mascara packaging can transform an everyday beauty ritual.

Refillable Packaging

Rouge Experience Refillable Lipstick

Lisa Eldridge's Rouge Experience Refillable Lipstick from HCP Packaging features a 100% aluminum monomaterial refillable mechanism, a first in the beauty industry, crafted to be recyclable without disassembly while reducing plastic usage.

The sleek outer case, inspired by vintage makeup artistry, is made from fluted zamak and finished with Lisa Eldridge's gold tone through e-coating technology. The refill system allows consumers to replace or swap shades with ease while contributing to a circular economy.

Designed and manufactured in HCP's facility, this pack combines aesthetics with functionality.

Lancôme Selects a POM-Free Refillable Pump

Lancôme selected the HDS Innune Refill pump from Aptar Beauty for its first haute-parfumerie collection, including Centifolia Rose, which was created at the brand's Domaine de la Rose property in Grasse, France.

The Inune pump uses Aptar's High Definition Spray (HDS) actuator technology to ensure that every facet of each fragrance is released to its fullest potential. HDS Inune Refill is a light spray that delivers a wide and fine diffusion. With each actuation, a 70 mcl dose is released.



Lancome's Centifolia Rose from the haute-parfumerie collection, featuring the Innune Refill Pump from Aptar Beauty.

The POM-free pump has no metal contact with the fragrance, which is designed to safeguard the fragrances' olfactory identity.

With Absolue Les Parfums, Lancôme has officially made the switch to developing a refillable fragrance product. HDS Inune is provided with an SNI 15 screw neck to allow easy refilling.

Yaël Letrosne, responsable de comptes senior, Aptar Beauty EMEA, says, "We are seeing a rise in niche fragrance collections from luxury brands, using the same packaging solution for a variety of scents. Each brand has its own unique requirements and Lancôme's is particularly exacting, both in terms of aesthetics and technology. Our partnership with Lancôme has resulted in a high-performing dispensing solution that seamlessly fits in with the range's look." ■

Courtesy of Lancôme and Aptar Beauty



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