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MARCH 2025

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The Competition for Sustainability

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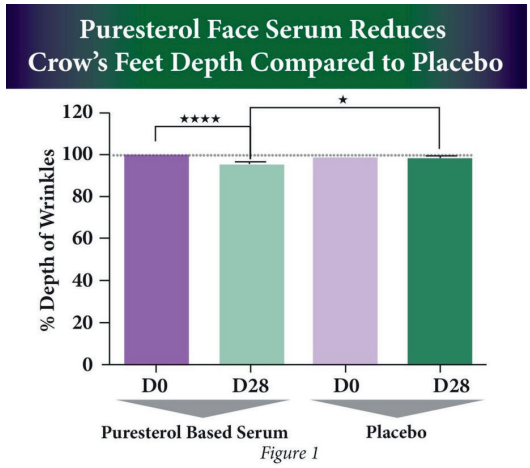


Figure 1

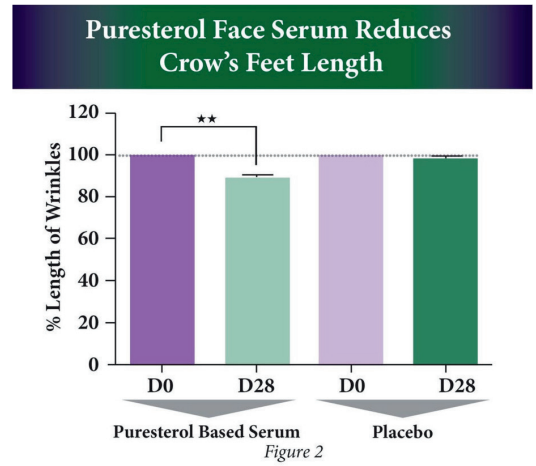


Figure 2

Randomized, placebo controlled, double blind clinical trial with 21 patients in each arm (n= 42) applying serum morning and at night, for 28 days.
**** Indicates statistically significant p-value <0.0001
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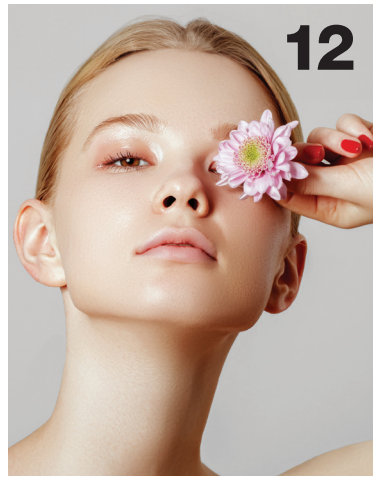

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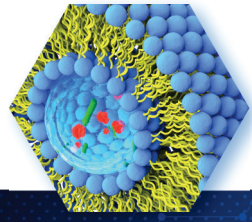
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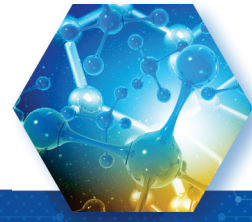
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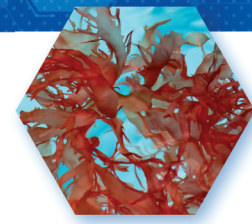






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Inside This Issue: Beauty Industry Innovations in 2025



Shoppers are prioritizing sustainable and innovative beauty products, with clean labeling and eco-friendly packaging influencing purchasing decisions.

In our March 2025 issue of Global Cosmetic Industry, we cover all the latest on what's happening in the beauty industry, and how brands, suppliers and manufacturers are navigating current challenges in the market. Sustainability is reshaping every aspect of the beauty industry, from ingredient sourcing to manufacturing and packaging. Brands are adapting to eco-conscious consumers by adopting closed-loop systems, innovative materials, and waterless formulations. This shift is influencing everything from product lifecycles to consumer purchase decisions.

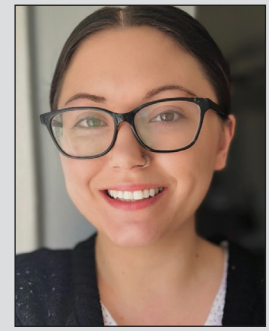
Skin and Hair Care Trends

Skin care continues to evolve, with 2025 focusing on textures and multi-functional products. Standout trends include milky toners, snail serums and red light devices. Consumers are prioritizing solutions for barrier repair, acne-safe formulations, and mature skin.

From boho knotless braids and Cherry Cola shades to texturizing powders and heatless curlers, today's hair care trends are more exciting and varied than ever. Our March issue explores the growing focus on scalp health, alongside targeted solutions for hormonal hair loss and sensitive scalps, reflecting a deeper shift toward personalized hair care.

Inside Beauty Manufacturing

The beauty manufacturing industry is changing due to efficiency, technology, sustainability, and transparency. AI-powered quality control systems improve product quality and reduce waste. Sustainability efforts include eco-friendly practices and sustainable packaging, driven by consumer demand and regulations. Transparency about ingredients and supply chains builds trust and



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differentiates brands. Industry leaders confirm that embracing technology, sustainability, and transparency is crucial for future success.

Packaging Trends That Elevate Brands

Packaging trends for beauty and personal care in 2025 are showcasing a clear shift toward minimalism, sustainability, and interactive elements. This is driven by an increasing consumer awareness of environmental issues and a desire for a more streamlined and engaging product experience.

Minimalist designs are characterized by clean lines, simple typography, and a focus on the essential elements of the product. This approach not only creates a visually appealing aesthetic but also reduces waste by using fewer materials. Companies are also increasingly adopting eco-friendly materials, such as recycled plastics, biodegradable materials, and compostable packaging. Additionally, there is a growing emphasis on refillable packaging and reusable containers to minimize single-use plastic waste.

Glass packaging is experiencing a resurgence in popularity, particularly in the fragrance sector. Glass is a recyclable and infinitely reusable material that conveys a sense of luxury and elegance. Its premium feel aligns with the growing demand for high-quality, sustainable products.



Skin care continues to evolve, with 2025 focusing on textures and multi-functional products.

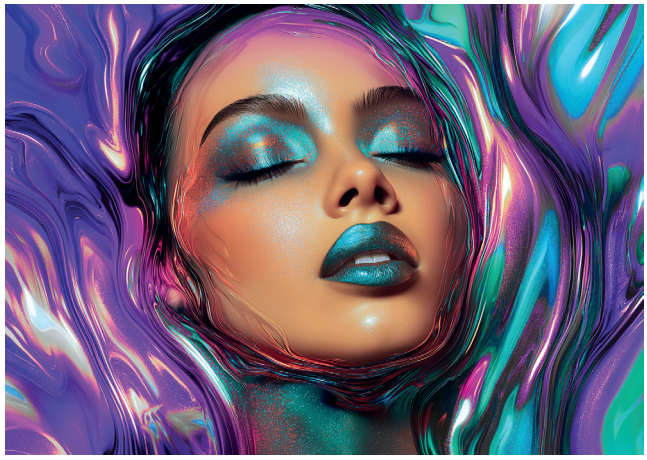
In 2025, the beauty industry is undergoing a significant transformation driven by sustainability, technological advancements, and evolving consumer preferences. Hair and skin care are becoming increasingly personalized, with a focus on scalp health and targeted solutions. Packaging trends reflect a shift toward minimalism, sustainability, and interactivity, with a growing emphasis on eco-friendly materials and reusable containers. These changes highlight a dynamic and responsible industry that adapts to meet the needs of both consumers and the environment. ■

Jennifer Pottenger



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Images courtesy of the manufacturers



Eco Smart Containers

Federal Package

http://www.federalpackage.com/sustainability

Federal Package is a preferred container manufacturer for many leading personal care companies. Their sustainable containers have minimal environmental impact without compromising performance. Eco Smart and post-consumer recycled (PCR) containers for beauty and personal care allow your brand to improve your sustainability bottom line without compromising form or function.



Nutra Plant Complex II

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https://www.bio-botanica.com/nutra-plant-complex/

Bio-Botanica's Nutra Plant Complex II is a powerful blend of botanical extracts crafted to enhance beauty and wellness. This unique formula draws on centuries-old herbal knowledge, providing a natural approach to hair care. This product is formulated for use in shampoos, hair rinses, and conditioners.



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INSIDER INSIGHTS:

THE COMPETITION FOR SUSTAINABILITY IN THE BEAUTY INDUSTRY

As sustainability becomes the driving force of the beauty industry, brands making environmental responsibility a part of their core philosophy stand a better chance of earning consumer loyalty and trust.



"Innovation in design for recyclability is a major focus, prompting us to develop packaging solutions that prioritize sustainability," says Stephanie Rowntree, international product manager, HCP Packaging.

Image by Tatiana at Adobe Stock

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Jane Tervooren, co-founder, director, Validated Claim Support.



Stephanie Rowntree, international product manager, HCP Packaging



Johan Jansen-Storbacka, director, personal care, health and biosciences, IFF

As the world becomes increasingly conscious of sustainability, the beauty industry is evolving as well, shifting from traditional practices to eco-friendly product innovation. This revolution is spurred on by factors like increasing consumer interest in sustainable products, growing environmental consciousness and regulatory pressures. Brands are not just talking the talk, but walking the walk, changing the game with practices like biodegradable packaging, refillable compacts and the use of clean ingredients. Whether it's the bustling indie brands or the established industry leaders, everyone is keen on creating a cleaner, greener future for beauty.

How Sustainable Initiatives are Transforming Product Development in the Beauty Industry

Jane Tervooren, co-founder, director, Validated Claim Support, says, "Sustainable initiatives are revolutionizing beauty product development, and it's awesome! Think biodegradable packaging, refillable compacts, and waterless formulas—less waste, driving more sales. Brands are going all-in with fair-trade ingredients and plant-powered goodies that are as good for the planet as they are for your skin. Thanks to green chemistry, clean, non-toxic products are taking over, with a side of smaller carbon footprints. Add in those trusty cruelty-free and vegan labels, and you've got consumers' trust and loyalty. By embracing circular economy vibes, beauty brands are flipping the script on old-school practices and creating a future that's greener, cleaner, and better for the environment."

Stephanie Rowntree, international product manager, HCP Packaging, says, "Sustainable initiatives are fundamentally transforming product development in the beauty industry, driven by consumer demand, heightened environmental awareness, and increasing regulatory pressures. Brands are progressively adopting circular economy principles, while regulations like the U.K. Plastic Packaging Tax, the upcoming EU Packaging and Packaging Waste Regulation, and in the U.S., the Plastic Pollution Prevention Act (California Senate Bill 54, a new EPR legislation with wide influence) are accelerating this shift."

Rowntree adds, "Innovation in design for recyclability is a major focus, prompting us to develop packaging solutions that prioritize sustainability. These include the use of materials widely accepted for recycling, mono-material designs to reduce contamination in the recycling stream, and refillable or rechargeable options that not only minimize waste and resource consumption, but also enhance brand loyalty."

"Rowntree concludes, "New legislation and Extended Producer Responsibility are encouraging a holistic approach to sustainability across the entire supply chain. Our collaborations with brands encompass the full packaging lifecycle, extending beyond consumer-facing aspects. Initiatives include reducing transit packaging, transitioning to recyclable materials for secondary and tertiary packaging, and optimizing unit density to increase items per shipment. These steps minimize transportation emissions and improve waste separation, ultimately enhancing sorting and recycling rates."

Johan Jansen-Storbacka, director, personal care, health and biosciences, International Flavor and Fragrance, says, "Sustainable initiatives are significantly transforming product development in the beauty industry. Today's consumers expect BPC products to be inherently sustainable, with brands demonstrating clear and verifiable sustainability practices. As consumer awareness grows, sustainability will encompass the entire product lifecycle, including natural origin, carbon emissions, and biodegradability. Consumers expect brands and their suppliers to align

L to R: Courtesy of Validated Claim Support; HCP Packaging; International Flavor and Fragrance

with their personal values, where sustainability is a significant factor."

Jansen-Storbacka adds, "Additionally, consumers demand that sustainable products perform well and are cost-effective. The industry is expected to deliver the efficacy consumers expect, based on the sustainable value they take for granted."

How Consumer Demand for Sustainability is Shaping Marketing Strategies in the Beauty Industry

Tervooren says, "Consumer demand for sustainability has totally flipped the script on beauty marketing! Now, it's all about keeping it real with transparency, eco-chic vibes, and authentic storytelling. Brands are proudly shouting out their cruelty-free badges, vegan-friendly formulas, and planet-saving packaging in campaigns that feel more like a movement than a sales pitch. Ethical sourcing? Carbon-neutral goals? Community love? That's the new beauty talk. Social media is buzzing with green beauty influencers, turning eco-conscious living into the hottest trend. And those sustainability reports? They're the new trust builders. It's all about aligning with values, winning hearts, and standing out amongst the sea of competitors!"

Fabrice Lefevre, Ph.D., marketing innovation director, Givaudan Active Beauty, says, "Sustainability has become a central factor in the purchasing decisions of today's consumers. Across all demographics—regardless of age, gender, or geographical location—the environment remains a cause that deeply resonates. Consumers are increasingly prioritizing products that align with their values, seeking options that are not only effective, but also contribute to a healthier planet."

Lefevre remarks, "However, younger generations, particularly Gen Z, are leading the charge in this shift toward sustainability. These consumers have grown up in a world where environmental challenges are ever-present, shaping their expectations for brands and products. One of our recent studies highlights that 78% of Gen Z beauty consumers prefer products that are good for the planet. This sentiment is even stronger in regions like Brazil, where an impressive 86% of young consumers demand sustainable beauty solutions."



Fabrice Lefevre, Ph.D., marketing innovation director, Givaudan Active Beauty



Indie Lee, founder of clean skin care brand Indie Lee

He adds, "European and American consumers also show a heightened focus on sustainability, with increasing awareness of the environmental impact of their choices. For them, sustainability is not just a trend—it's an essential element of the value equation when evaluating a brand's offerings. This shift underscores a broader transformation within the beauty industry. Brands that prioritize eco-design, ethical sourcing, and transparency are not just meeting consumer demand—they are shaping the future of the industry. From biodegradable packaging to responsibly sourced ingredients, these efforts are now table stakes for engaging a generation that views beauty as an extension of their values. Ultimately, sustainability is no longer a niche concern but a universal expectation. Companies that integrate environmental responsibility into their DNA are poised to win the trust and loyalty of consumers worldwide."

Indie Brands and Big Beauty Team Up to Drive Sustainability

Tervooren says, "Smaller indie beauty brands have been stealing the sustainability spotlight, showing off their eco-savvy moves with refillable packaging, clean ingredients, and planet-loving vibes. They're agile, creative, and know how to connect with eco-conscious consumers. But big beauty isn't sitting this one out! The giants are catching up, rolling out bold sustainability promises, snapping up green startups, and rethinking their practices. It's like a friendly competition for the planet's sake. While the little guys lead with heart and innovation, the big players bring the money muscle to make a massive impact. Together, they're reshaping the beauty industry—greener and better than ever!"

Navigating Regulatory Changes While Adopting Sustainable Practices

Rowntree says, "Sustainability is not only a guiding principle, but also an enduring trend shaping the future of the beauty industry. Its influence will undoubtedly expand, driving innovation and fostering new practices across the sector."

She adds, "Several key drivers will shape this evolution. Legislation remains a significant catalyst for change, as recent regulatory measures have demonstrated. Globally, upcoming environmental regulations for the next decade will continue to push brands to adopt sustainable practices, either through compliance mandates or financial incentives."

L to R: Courtesy of Givaudan Active Beauty; Indie Lee

Rowntree continues, "Consumer demand is arguably the most powerful force propelling sustainability. With environmental concerns frequently highlighted in the media, consumer awareness influences purchasing decisions, encouraging brands to offer more eco-friendly products."

She concludes, "Achieving sustainability and circularity, however, is not something any single brand or organization can accomplish alone. Collaboration across the supply chain is essential. From raw material suppliers to freight companies, stakeholders must work together to create impactful, environmentally conscious products. We anticipate that these partnerships will grow, enabling the development of innovative solutions that meet both consumer expectations and sustainability goals."

Finding the Balance Between Affordability and Sustainability Without Compromising on Quality

Jansen-Storbacka says, "Consumers, millennials in particular, increasingly say they want brands that embrace purpose and sustainability. In one recent survey, despite a resounding 65% expressing the desire to buy purpose-driven brands that advocate sustainability, only about 26% do so."

He adds, "This intention-action gap can be attributed to various factors including the perceived trade-off between sustainability and product performance. Additionally, the availability, accessibility, and affordability of sustainable options can influence purchasing decisions."

Jansen-Storbacka says, "To drive meaningful change in the beauty and personal care industry requires reaching quantities that matter. Leveraging the economy of scale is pivotal for driving innovation and reducing costs. As production volumes increase, per-unit costs decrease, making sustainable products more accessible and competitive in the market. This, in turn, can influence broader consumer behavior toward eco-conscious choices."

Indie Lee, founder of clean skin care brand Indie Lee says, "We believe that sustainability and effectiveness go hand in hand, and we're proud of how far the industry has come in achieving this balance. When I first entered the clean beauty space, the options for eco-friendly ingredients that could deliver proven, science-backed results were limited. But consumer demand for sustainable and "clean" products has redefined the beauty landscape, making it possible—and essential—to prioritize both."



Brands and manufacturers face continued challenges as consumers become more educated about the ingredients that are used in the beauty products they purchase.

Lee adds, "Today's ingredient technology has evolved to allow us to create high-performance formulas that are both safe and environmentally responsible. It's incredibly rewarding to see that we no longer have to sacrifice efficacy or environmental standards; instead, we're able to offer our customers beautiful products that honor their commitment to sustainability and align with our brand's values."

Lefevre says, "It's clear that there's no turning back when it comes to sustainability. This has been a focus for over a decade, driven by growing consumer expectations—particularly from younger generations in the beauty industry—continues to grow. These consumers are looking for values that go beyond sustainability, focusing on what we call transparency. From one of our consumer studies, 88% of beauty consumers, when buying a cosmetic product, want to know the story and the traceability of the ingredients inside."

He adds, "They want to understand a brand's ethos, the origins of its ingredients, how they are made, their environmental impact, and why the brand chose them for a product. Ultimately, they want to know how these choices directly benefit them. For these consumers, beauty is a purposeful act—an opportunity to make a meaningful impact. They are actively seeking deeper insights, whether through their own research or with the help of apps that provide detailed information on ingredient sourcing and the socio-economic commitments of beauty brands."

The wave of transformation washing over the beauty industry is rapidly turning sustainability from a mere niche to a standard expectation. Consumers actively demand green products, pushing companies to embrace ethical sourcing, transparency and responsibility toward the environment. This change is not just skin-deep; we see deep-seated collaborations across supply chains, ingenious materials, and a stern focus on cost-effectiveness alongside quality. As sustainability becomes the driving force of the beauty industry, brands that make environmental responsibility part of their core philosophy have a better chance of earning consumer loyalty and trust. The future of beauty is green, and it's here to stay. ■

Image by Анна Демидова at Adobe Stock



Consumers expect products that deliver results. This demand is being met through the development of advanced delivery systems that target specific skin concerns, as well as the incorporation of potent ingredients such as peptides, proteins, and antioxidants.

Image by looking2thesky at Adobe Stock

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NEW BEAUTY INGREDIENT ADVANCES: SUSTAINABILITY X EFFICACY

This article examines novel ingredients and technologies available to cosmetic formulators, including a bioactivating hexapeptide derived from human skin to stimulate collagen production, fermented ingredients that inhibit glycation and more.

JENNIFER POSTERNACK, *Global Cosmetic Industry*; RACHEL GRABENHOFER, *Cosmetics & Toiletries*

The beauty industry is undergoing a significant transformation, driven by a growing consumer demand for sustainable and effective products. However, sustainability alone is not enough. Consumers also expect products that deliver results. This demand is being met through the development of advanced delivery systems that target specific skin concerns, as well as the incorporation of potent ingredients such as peptides, proteins, and antioxidants.

Transparency and traceability are also becoming increasingly important in the beauty industry. Consumers want to know where their products come from and how they are made. This has led to a greater emphasis on supply chain transparency and the use of certifications that verify the sustainability and ethical sourcing of ingredients.

Collagen Synthesis

Mibelle Biochemistry Launches CollPerfect P6 for Collagen Synthesis, Dermal Remodeling

Mibelle Biochemistry has launched CollPerfect P6, an encapsulated bioactivating hexapeptide derived from the sequence of human skin type I collagen. According to the company, the ingredient's unique composition stimulates collagen synthesis and dermal remodeling for a more youthful, radiant appearance.

Structure and function: Delving deeper into the chemistry, as the company explains, CollPerfect P6 (INCI: Collagen Amino Acids (and) Lecithin (and) Maltodextrin (and) *Aqua*/Water) is a six amino acid peptide that "contains the characteristic triplet sequence Gly-X-Y of the native human skin type I collagen and its most abundant amino acids: Gly-HyP-Lys-Gly-Pro-Lys."

Mibelle Biochemistry adds that using a shorter hexapeptide improves the ingredient's penetration, while the presence of Lys (lysine) improves its solubility. Building from this, the peptide is encapsulated in liposomes to ensure stability and delivery. Then, it is spray granulated onto maltodextrin to ensure a long shelf life.



Through fermentation using a proprietary strain of Lactobacillus plantarum, *OnScent enhances the benefits of acerola cherry, increasing nutrient bioavailability and mitigating glycation and fine lines.*

Image by Henrique at Adobe Stock

CollPerfect P6 has been shown to improve various skin attributes. It acts through key mechanisms, including:

- Promoting procollagen production
- Boosting hyaluronic acid release
- Protecting dermal collagen fibers from aging
- Tightening facial contours
- Increasing skin elasticity and density

Based on the described mechanisms, CollPerfect P6 is positioned as a multifunctional that addresses the visible effects of aging at the root level. Indeed, clinical research underscores its efficacy in maintaining elasticity, firmness and a youthful skin structure.

Per the company, the ingredient responds to recent studies suggesting declining collagen levels might not just be a consequence of aging, but a potential cause.

The ingredient is provided as a water-soluble powder without alcohol or preservatives. It is recommended at a use level of 2%.

Alistisilane Peptide + Silicium Revascularizes, Reshapes Facial Skin

Exsymol launched its latest anti-aging ingredient during Cosmet'Agora: Alistisilane, merging decarboxycarnosine — a peptide — with biofunctional silicium to synergistically deliver benefits including enhanced skin elasticity, reduced wrinkles and improved radiance. The active is 99.1% natural, per ISO 16128, and according to Exsymol, it can integrate into formulations for advanced skin care applications.

According to the company, Alistisilane takes a three-step approach to rejuvenate and revitalize skin. Proven mechanisms include:

- *Protecting against glycation:* Decreasing advanced glycation end-products (AGEs) by 50% and curbing collagen degradation by 30%, to preserve skin structure.
- *Restructuring the extracellular matrix:* Boosting collagen density by 28% and enhancing fibronectin levels by 40%, stabilizing blood vessels and aiding skin regeneration.
- *Restoring vascularization:* Promoting a 24% increase in endothelial cell proliferation and improving revascularization by 84% in just two hours.

A clinical study of 30 women, ages 40 to 60, showed that the application of the product over 56 days improved:

- *Facial contour*, with a 10% reduction in sagging
- *Skin smoothness*, with a 16% decrease in roughness
- *Wrinkles*, with a 20% reduction in wrinkle depth
- *Radiance, w*ith a 43% enhancement in complexion glow

As Exsymol explained, blood vessels play a vital role in nourishing skin cells by delivering oxygen and nutrients, while providing structural support to prevent sagging. However, with age and external aggressors, vascular regression occurs, leading to dermal papillae loss, dermo-epidermal flattening and visible signs of aging, such as wrinkles and dullness. By restoring vascularization, Alistisilane addresses these foundational aspects of skin health.

Alistisilane's proven efficacy and multifunctionality make it a compelling solution for rejuvenating and revitalizing aging skin, the company notes. Through its advanced peptide and silanol technologies, the ingredient is designed to deliver comprehensive benefits to maintain a youthful, radiant appearance.

Fermented Ingredients for Hair and Skin

OnScent Debuts Acerola Cherry Ferment to Inhibit Glycation, ROS for Skin and Hair

Premier Naturals, the natural cosmetics division of OnScent, introduced its Acerola Cherry Ferment at both the 2024 SCC Annual Scientific Meeting in L.A. and Cosmoprof 2025 in Miami. According to the company, acerola cherry has captured the interest of beauty innovators due to its high antioxidant and vitamin C content.

Through fermentation using a proprietary strain of *Lactobacillus plantarum*, these benefits are enhanced, increasing nutrient bioavailability and



Cosphaderm Propanediol is a natural, multifunctional ingredient derived from corn. It moisturizes, softens and dissolves other ingredients, making it ideal for skin and hair care.

Image by kamonrat at Adobe Stock

mitigating glycation and fine lines. The ingredient is thus said to leverage the nutritive power of acerola cherry to deliver benefits for both skin and hair care while meeting eco-conscious beauty standards.

Acerola Cherry Ferment's (INCI: *Lactobacillus*/Acerola Cherry Ferment) touted benefits include:

- Reducing glycation formation by 36% over 28 days, helping slow visible signs of skin aging
- Improving skin elasticity and boosting radiance, while supporting healthy, vibrant hair
- Providing robust protection against environmental stressors, combating oxidative damage

Beyond its topical benefits, Acerola Cherry Ferment reportedly aligns with the highest sustainability benchmarks, being:

- ISO 16128 certified
- Vegan
- Environmentally sustainable

Cosphatec Presents Corn Ferment-derived Palm-free Diol

Cosphatec's Cosphaderm Propanediol is a natural, palm-free diol derived from non-GMO corn fermentation. The ingredient offers multifunctional benefits for skin and hair, as well as formulations.

As a natural, transparent and colorless ingredient, Cosphaderm Propanediol (INCI: Propanediol) is water-soluble, making it suitable for both skin and hair care, per the company.

Functionally, it serves as a:

- Moisturizer
- Humectant
- Emollient
- Solvent

Additionally, it is said to enhance the efficiency of preservative systems. It is also COSMOS and Natrue compliant.

According to Cosphatec, the ingredient is designed for product developers seeking alternatives to petrochemical or palm oil-derived ingredients. This natural palm-free option therefore expands options for sustainable, effective formulations.



Blue Sun's latest lineup includes biodegradable glitter, butter-coated powders and plant-based thickeners.

Sensorial and Sustainable Sun and Color

Blue Sun Innovates Bioglitter, Butterpowder, Bluecam Ranges for Sustainable Performance

Blue Sun has added three new ingredient ranges to its portfolio, designed to meet evolving industry needs for sustainability, performance and clean beauty formulations. The lineup includes biodegradable glitter, butter-coated powders and mild, plant-based thickeners. Per the company, these newly introduced ingredients aim to combine innovation and sustainability while meeting the technical demands of high-performance cosmetic applications.

Bioglitter range for eco-friendly formulas: The Bioglitter range (INCIs: Vary) was created from eucalyptus cellulose, offering a sustainable alternative to microplastic-based glitters. This glitter is fully compliant with EU 2023-2055 microplastic regulations, certified biodegradable by TUV Austria, and reportedly features robust formulation compatibility. It works across a wide range of product types, including water-based, oil-based and alcohol-based systems, as well as nail polishes and soaps. This eco-conscious glitter biodegrades naturally in environmental water systems, ensuring minimal ecological impact, per the company.

The Bioglitter range includes three lines:

- *Bioglitter Pure:* This opalescent/iridescent effect glitter has a completely new structure, and like iridescent glitter, does not contain aluminum; available in 13 colors and five sizes
- *Bioglitter Sparkle:* Available in 18 colors and six sizes; contains aluminum; comprises metallic effect glitter, reportedly indistinguishable in appearance from traditional metallic effect plastic glitters.
- *Bioglitter Holo:* Precision cut, highly reflective, specialized regenerated cellulose film; contains aluminum; creates a striking holographic effect; coated with natural resin; suited for dry, water-based and oil-based applications, and complies with the cosmetic regulations of all major regions; currently available

Image by graphia at Adobe Stock

in silver only. Note: FDA cosmetic regulations not suitable for use on lips (lipstick and lip gloss).

Butterpowder line for luxurious textures: Blue Sun's butter-coated powders are engineered for modern cosmetic formulations with eco-friendly and vegan requirements. The Butterpowder range includes multiple offerings based on seven powders: a mica/kaolin/barium sulfate blend, barium sulfate, kaolin, mica, talc, starch and synthetic mica (INCIs: Vary).

The latest addition, Butterpowder Gel is based on the powder blend (INCI: Kaolin (and) Barium Sulfate (and) Mica (and) Arginine Cocoate (and) *Theobroma Cacao* (Cocoa) Seed Butter (and) Quaternium-90 Bentonite (and) *Vitis Vinifera* (Grape) Seed Oil (and) Tocopheryl Acetate). Per the company, the combination of natural butters, soft-touch oils and derived solvents delivers stable, mousse-like textures with a velvet feel and matte finish.

Designed for easy mixing in cold processes, it helps maintain the skin's hydrolipidic balance without drying. Applications include primers, eyeshadows, liquid-matte lipsticks, foundations and cream blushes. It reportedly offers reliable thixotropic viscosity and pigment suspension across diverse viscosity ranges, with use levels ranging from 3-5% in emulsions to 15-80% in color formulations.

Tegosoft BC MB Wax Ester

Evonik's Tegosoft BC MB is a natural emollient designed to meet the growing demand for eco-friendly and sustainable cosmetics. Produced via an enzymatic process, the ingredient is designed to offer enhanced functionality and sustainability, particularly for natural sun care and color cosmetics.

According to Evonik, Tegosoft BC MB (INCI: Butylene Glycol Dicaprylate/Dicaprate) demonstrates several benefits.



Seqens' new AdvensProtect 8 Green is a 100% biobased caprylyl glycol that offers multifunctional effects, including moisturizing capabilities, enhanced preservation and improved sensory and formulation benefits.

- *Lightweight texture and skin feel:* It delivers a light, non-greasy finish, providing a comfortable feel without leaving an oily residue.
- *Solubility for UV filters:* The ingredient is said to demonstrate exceptional solubility, making it ideal for formulating with crystalline UV filters in sunscreen products.
- *Pigment wetting properties:* Tegosoft BC MB offers effective wetting properties for hydrophobic pigments, ensuring even distribution in formulations like color cosmetics.
- *Sustainable, efficient production:* Produced through a bio-catalyzed enzymatic method powered by renewable energy, this process significantly reduces environmental impact.
- *Reduced CO_2 footprint:* The production method achieves a 70% lower carbon footprint compared to fossil-based market alternatives, per Evonik.

According to Evonik, Tegosoft BC MB is particularly effective in formulations for natural sun care and color cosmetics, emphasizing sustainability while maintaining high performance. By combining scientific innovation with sustainability, the ingredient can effectively meet the evolving needs of modern cosmetic formulations.

Green Bio-based Caprylyl Glycol Multifunctional

Seqens launched AdvensProtect 8 Green, a 100% biobased caprylyl glycol, to answer the need for sustainable, high-performance cosmetic ingredients. Designed and manufactured at Seqens' U.K. site, this solution offers a multifunctional approach to enhancing formulations across various personal care applications.

According to Seqens, AdvensProtect 8 Green (INCI: Caprylyl Glycol) offers formulators key functional benefits.

- *Multifunctional properties:* The ingredient serves as a humectant, emollient and preservative booster, supporting both formula simplicity and sustainability.
- *Moisturizing capabilities:* The ingredient's short lipophilic chain effectively integrates with lipid structures in the skin's upper layers, optimizing moisture retention for improved hydration.

Image by master1305 at Adobe Stock

- *Sensory and formulation benefits:* AdvensProtect 8 Green acts as a viscosity regulator to enhance the sensorial profile of formulations. In addition, per the company, improves pigment dispersion, adds wetting properties, and significantly reduces the tacky feeling often associated with similar products.
- *Enhanced preservation:* When paired with other preservatives or multifunctionals, AdvensProtect 8 Green can boost the effectiveness of their preservation systems.

According to Seqens, the AdvensProtect 8 Green biobased caprylyl glycol is ideal for skin, hair and makeup products. Its adaptable properties can be used in serum, cream and lotion formats, as well as in formulations requiring a preservative boost with added moisturizing benefits. It thus supports the industry's shift toward natural and biobased solutions with high performance.

Natural Thickening, Stabilizing

Keltrol Biodegradable, Certified Xanthan Gums

CP Kelco highlights its Keltrol range of certified biodegradable xanthan gums to enhance personal care formulations while aligning with sustainability and transparency priorities. These COSMOS- and NATRUE-certified ingredients meet vegan, non-GMO and cruelty-free standards to deliver strong ethical value without sacrificing performance.

According to the company, xanthan gum is a versatile thickening and stabilizing agent, ideal for applications in natural shampoos, lotions and shower gels. It can enhance texture and consistency, providing a luxurious feel to products while maintaining stability across a wide range of temperatures and pH levels.

The company's range of Keltrol xanthan gum variants is designed to offer formulators precision and reliability for diverse applications. For example:

- *Keltrol CG-V [E]:* Forms a cloudy gel in water to improve cosmetic stability; it is certified by Cosmos and Natrue.
- *Keltrol CG-F V:* Is a fine powder option designed for easy blending.
- *Keltrol CG-T V [E]:* Creates transparent gel formations, ideal for clear product formulations; it is also Cosmos and Natrue certified.
- *Keltrol CG-BT:* Hydrates in salt solutions to form clear gels for specialized formulations.
- *Keltrol CG-SFT and CG-SFT V [E]:* Provide smooth flow with reduced pseudoplasticity; the V [E] version is available with COSMOS and NATRUE certifications.
- *Keltrol CG-RD:* Is readily dispersible, producing clear gels even in low-shear environments. According to CP Kelco, with these innovative solutions, this continues to support the creation of sustainable, high-performance personal care products.



CP Kelco's Keltrol xanthan gum range offers sustainable and versatile thickening and stabilizing solutions for personal care products.

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Bluecam Plant-derived Thickener Series

Part of the Blue Sun's Bluecam series, Bluecam DOE-120 (INCI: PEG-120 Methyl Glucose Dioleate) is a naturally derived thickener suitable for anionic and amphoteric surfactant systems. Per Blue Sun, it is designed to reduce irritation and is particularly effective for baby care shampoos, scoring zero on eye irritation tests.

This plant-based thickener is said to provide a light emollient feel while preserving foaming properties, making it suitable for shampoos, body washes, bar soaps and foaming creams. It also offers excellent sensory properties and enhances surfactant formulations without compromising performance, Blue Sun reports.

Olive Squalane for Deep Skin Hydration

Skin hydration is essential for skin health and function. Factors such as environment, lifestyle, aging and skin conditions can all affect skin hydration. Natural ingredients like humectants, occlusives and emollients can help hydrate the skin by attracting and retaining moisture, strengthening the skin's barrier function and stimulating the skin's natural moisturizing factors.

Global Cosmetics Industry predicts that natural skin hydration trends in 2025 will include plant-based humectants, upcycled ingredients,

microbiome-friendly ingredients, waterless formulations and personalized skin hydration.

Overall, natural skin hydration is key for healthy skin, and consumers can expect to see more innovative and effective natural skin hydration solutions in the future.

TRI-K Launches OleaClear Olive Squalane for Deep Skin Hydration

OleaClear Olive Squalane by TRI-K is a transparent, plant-derived emollient designed for formulations including creams, lotions, lipsticks and more. According to the company, it is structurally similar to squalene, a natural component of skin's sebum, and lightweight and highly absorbent, imparting a silky, smooth finish.

OleaClear Olive Squalane (INCI: Squalane) offers a holistic skin care solution, imparting moisture while also locking it in. Per the company, key benefits include:

- *Deep hydration:* Softening skin while improving elasticity;
- *Moisture retention:* Protecting against water loss, supporting long-lasting hydration
- *Luxurious texture:* Delivering a distinctive, smooth and silky skin feel



OleaClear Olive Squalane, developed by TRI-K, is a natural emollient that provides deep hydration and moisture retention, designed to leave skin feeling silky and luxurious.

Beyond tangible benefits for skin, OleaClear Olive Squalane presents numerous potential natural and sustainable label claims, such as:

- Green, sustainable, biodegradable, clean, vegan, GMO-free, halal, kosher and cruelty-free.
- Palm-free, REACH registered, COSMOS approved and China approved.

According to the company, the ingredient also offers a high natural origin index of 1, meeting the demands of clean beauty formulations while enhancing product performance.



TRIsol KCP is a high-performance solution for stable emulsions, offering advanced qualities ideal for modern sun care, skin care and color cosmetic formulations.

Clean Emulsifiers and Exfoliants

TRIsol KCP: A Cleaner, High-performance Emulsifier for Sunscreens, Cosmetics and Skin Care

TRI-K developed the TRIsol KCP emulsifier as a solution to address the evolving demand for sustainability, while meeting stability and performance requirements. From boosting SPF performance to creating stable, high-pigment and high-emollient products, the ingredient offers various benefits in sunscreens, as well as color and skin care formulas.

From top: Image by Andrei; LuneVA/peopleimages.com at Adobe Stock



By upcycling the seeds of tagua palm, Quimivita aims to reduce the industry's reliance on non-renewable materials while promoting initiatives that generate income for small-scale producers.

According to TRI-K, TRIsol KCP's (INCI: Potassium Cetyl Phosphate) key functions in sun, color and skin care formulas include (efficacy testing was performed at 2%):

- Boosting SPF levels by up to 19% and delivering "unmatched" stability in mineral sunscreens and high-SPF products
- Reducing transepidermal water loss (TEWL) and enhancing the skin's barrier function
- Increasing the perception of hydration in skin care applications by 2×
- Ensuring vibrant, stable pigmentation and enabling bold and lasting effects in high-pigment color cosmetics
- Significantly improving the color of SPF products
- Supporting the development of rich, emollient formulations
- Ensuring stability across various complex systems

Additional ingredient benefits include: having an NOI of 1 and being vegan, biodegradable and China approved; recommended use levels range from 1-3%.

"TRIsol KCP is a high-performance solution for stable emulsions, offering advanced qualities ideal for modern sun care, skin care and color cosmetic formulations," said Uriel Plata, business manager, Fision and natural synergy products at the company. "Its eco-friendly and solvent-free production ensures consistent quality and functionality."

Exfowind Tagua Supports Natural Exfoliation and Social Progress

Quimivita's Exfowind Tagua, upcycled from the seeds of tagua palm (*Phytelephas aequatorialis*), offers a sustainable and renewable natural alternative to synthetic exfoliants. Its sourcing also supports the economic development of rural communities in Latin America while protecting biodiversity.

According to the company, tagua palm is often referred to as vegan ivory, lending various features to the Exfowind Tagua ingredient, including:

- Durability for exfoliation, promoting skin renewal;
- Versatility of particle sizes, adaptable to formulas ranging from facial scrubs to body and hair care products; and
- Broad compatibility and adaptability across product categories.

In addition, as noted, the production of Exfowind Tagua aligns with sustainability principles and the circular economy. By using this natural resource, Quimivita aims to reduce the industry's dependence on non-renewable materials, while promoting initiatives that generate income for small-scale producers.

The ingredient is said to empower cosmetic formulators to deliver products that meet consumer demand for eco-friendly, skin-friendly solutions, while supporting sustainable livelihoods in Latin America.

PFAS-free Peptides

Per- and polyfluoroalkyl substances (PFAS) have raised recent concerns due to their persistence in the environment and potential toxicity, spurring regulatory responses worldwide. In response, Croda Beauty highlighted its current PFAS-free peptides — a list it will continue to expand until all peptide offerings are PFAS-free.

"By eliminating substances like TFA (trifluoroacetic acid) from our peptide synthesis processes, we prioritize both consumer safety and sustainability," Croda Beauty explained. "Anticipating evolving regulations, we remain focused on delivering innovative solutions that uphold the highest standards of safety and efficacy."

According to Arp, et al.[a], in Environmental Science and Technology, "TFA belongs to the subclass of per- and polyfluoroalkyl substances (PFAS) known as ultrashort-chain perfluoroalkyl acids (PFAAs)." The authors added that currently, TFA concentrations are orders of magnitude higher than other per- and polyfluoroalkyl substances (PFAS), which is due to the material's use as a transformation product.

[a]https://pubs.acs.org/doi/10.1021/acs.est.4c06189

Image by Quimivita at Adobe Stock

Thermo Scientific described TFA[b] as "commonly used in the manufacturing process to release synthesized peptides from solid-phase resins...[as well as] during reversed-phase HPLC purification of peptides." The sourced added, "TFA is manufactured using acetate and fluoride as precursors, and residual levels of these compounds may be present whenever TFA is used. Residual TFA, fluoride, and to a much lesser extent, acetate are toxic and undesirable in peptides intended for preclinical and clinical studies."

Arp, et al., concurred, "There are indications from mammalian toxicity studies that TFA is toxic to reproduction and that it exhibits liver toxicity," the authors wrote, adding that while ecotoxicity data is scarce, collective trends imply that TFA "meets the criteria of a planetary boundary threat for novel entities because of increasing planetary-scale exposure."

According to Croda Beauty, its current PFAS-free peptides include the following ingredients.

- Biopeptide CL
- Maxi-Lip
- Bio-Bustyl PH
- Matrixyl Synthe 6
- Volulip
- Silverfree
- Biopeptide EL
- Dermaxyl
- Calmosensine
- Idealift

[b] https://rb.gy/v7mkmk



Croda Beauty highlights its current PFAS-free peptides — a list it will continue to expand until all peptide offerings are PFAS-free.

"We are committed to progressively expanding this list to achieve a PFAS-free status across our entire peptide range by the end of 2026," the company announced.

Sensitive Skin Solution for Chinese Market

BASF has successfully obtained a new cosmetic ingredient notification for its Symbiocell product in China. This pre-market approval is mandated for cosmetic ingredients used for the first time in the Chinese market.

Symbiocell (INCI: Water (*Aqua*) (and) Butylene Glycol (and) *Cestrum Latifolium* Leaf Extract (and) Xanthan Gum (and) Propanediol (and) Caprylyl Glycol) is an active ingredient designed to soothe sensitive skin and mitigate excessive cutaneous reactions. It was developed in response to growing consumer demand for sensitive skin care solutions, particularly in the Asia-Pacific region.

According to BASF, the primary component of Symbiocell, *Cestrum latifolium*, is a tropical plant known



Symbiocell, now China-approved, is designed to soothe sensitive skin and mitigate cutaneous reactions.

From top: Image by luckybusiness; vegefox.com at Adobe Stock

for its healing properties, which has traditionally been used for various skin concerns. The ingredient has been shown in vitro to support healthy basal expression levels of the protein CD86 in skin dendritic cells. This action contributes to the reduction of skin sensitivity and reactivity.

Symbiocell was evaluated in a double-blind clinical study of 31 women who, over three weeks, applied a face care formula containing 2% Symbiocell to one side of the face and a benchmark product to the other. Results showed a significant 62% reduction in cutaneous discomfort with the test active, compared with a 58% reduction by the benchmark.

In subjects' facial skin, the side treated with Symbiocell also:

- Decreased stinging test scores by 20%, outperforming the benchmark's 14% reduction;
- Comforted and soothed skin in 97% of participants, with 90% noting reduced skin irritation; and
- Improved skin's defenses against external aggressors in 87% of subjects.

The ingredient's notification in China is said to underscore BASF's commitment to addressing sensitive skin challenges in the Asia-Pacific market. What's more, it exemplifies the company's pursuit of a sustainable, effective personal care solution, aligning with the Care Chemicals division's Care 360° initiative.



Spray-Tek's microencapsulation technology provides a sustainable, high-performance delivery system that addresses growing consumer demands for eco-friendly solutions.

Patent Granted for Biodegradable Microencapsulation Technology

Spray-Tek has been granted a U.S. patent for its biopolymer-based core/shell microencapsulation technology. Per the company, this advancement in particle engineering offers enhanced protection for encapsulated actives, such as fragrance oils, while maintaining the biodegradability of the polymer.

The patented process modifies natural biopolymers to create durable core/shell microcapsules with low permeability. These capsules protect active ingredients, while allowing microbes in the environment to break down the polymer over time.

"Our patented solution balances active protection with environmental sustainability," said Jiten Dihora, chief technology officer at Spray-Tek. CEO Ray Rambowski noted this milestone reflects the company's commitment to advancing microencapsulation technology.

The innovation has applications across industries, including:

- Household care
- Personal care
- Agrochemical

It provides a sustainable, high-performance delivery system that addresses growing consumer demands for eco-friendly solutions. ■



Image by Spray-Tek at Adobe Stock

Partnering for Growth: KEY INSIGHTS INTO BEAUTY MANUFACTURING IN 2025

According to a report from FactMR, the global cosmetic manufacturing market is expected to reach $878.88 billion by 2034, driven by demand for innovation, personalization and sustainability.



North America leads in revenue due to its demand for high-end and natural beauty products, with East Asia predicted to exhibit the fastest growth (6.9% CAGR), driven by China and South Korea's remarkable market performance.

Image by Sliga at Adobe Stock

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According to a report[a] compiled by Fact.MR, the global cosmetic manufacturing market is projected to grow significantly, with revenue expected to reach $878.88 billion by 2034, at a CAGR of 6.4%.

North America leads in revenue due to its demand for high-end and natural beauty products, with East Asia predicted to exhibit the fastest growth (6.9% CAGR), driven by China and South Korea's remarkable market performance. Data from the report reflects how skin care products continue to dominate the market as consumers prioritize wellness and skin health, further boosted by advances in technology and personalized treatments.



The RT60 is an innovative solution engineered for high-performance tube filling and sealing that can process up to 70 tubes per minute.

The Expanding Role of Contract Manufacturing in Beauty

Contract manufacturing, once viewed as a straightforward outsourcing solution, has transformed into a vital strategic partnership for many industries, particularly in the beauty sector. These manufacturers are no longer just suppliers; they are key collaborators that contribute to a brand's success by offering specialized expertise, state-of-the-art production capabilities, and the flexibility to adapt to market trends.

Alexander Kwapis, vice president responsible for innovation, design, and engineering at FusionPKG, says, "During my visits to manufacturing facilities across China, I witnessed the transformative power of automation and robotics. These systems allow a single operator to manage multiple assembly lines or mold-making machines with precision, ensuring stability and scalability in the supply chain. China's ability to integrate technology with human expertise has been key to its dominance."

Kwapis adds, "In contrast, the United States struggles to keep pace. Outdated supply chains, underinvestment in automation, and a limited focus on robotics and AI have left American manufacturing in a precarious position. Compounding this is a lack of educational programs that prepare workers for the demands of modern manufacturing."

Technology and Innovation

The beauty industry is evolving rapidly, fueled by the growth and innovation of contract manufacturing. As consumer demand for diverse beauty products soars, brands are turning to manufacturers to scale their operations, drive innovation, and uphold strict quality standards.

ProSys Fill's Advanced Filling and Sealing Systems

ProSys Fill showcased its filling and sealing technologies at Cosmoprof Miami 2025. Attendees were given the opportunity to explore advanced systems designed to enhance efficiency, precision, and flexibility for manufacturers in the cosmetics industry.

RT60 Tube Filling and Sealing System

The RT60 is an innovative solution engineered for high-performance tube filling and sealing. Key features include:

- Filling Capacity: Processes up to 70 tubes per minute.
- Versatility: Compatible with plastic and metal tubes of varying sizes and styles.
- Efficiency: Fully automated filling and sealing reduces labor costs.
- Customization Options: Includes capabilities such as custom

[a]www.globenewswire.com/news-release/2024/12/09/2993575/0/en/Cosmetic-Manufacturing-Market-to-Reach-US-878-88-Billion-by-2034-Growing-at-6-4-CAGR-Fact-MR-Report.html

Courtesy of ProSys

profile seals, swirl filling, and unit dose filling for unique product presentations.
- Model Options: Available in three configurations—plastic/laminate, metal, and a combination model for seamless transitions between tube types.

This system ensures manufacturers can achieve optimal productivity while maintaining high-quality results.

LB30 Lip Balm Filler

Also featured at Cosmoprof, the LB30 Lip Balm Filler, a semi-automatic system tailored for hot melt filling, cooling, and capping lip balm sticks. Highlights of this system include:

- Production Speed: Fills up to 30 units per minute.
- User-Friendly Design: Features a manual loading station and a quick-change puck mounting system for tool-free size transitions.
- Integrated Operations: Includes onboard cap sortation and capping for streamlined performance.
- Precision Functionality: A "no tube-no fill" feature ensures cleanliness and accuracy.
- Temperature Control: Equipped with a 3-gallon jacketed stainless steel hopper and a heated filling head to maintain consistent temperature and dosing.
- Superior Finish: The re-melt station produces a smooth, glossy finish for lip balms.

This robust system guarantees reliable results for small- to medium-scale production lines.

HL-60 System

ProSys also introduced the HL-60 System, developed in collaboration with Pendergraph Machines. This compact and versatile solution is designed for co-packers and small-scale cosmetic manufacturers. Key advantages include:

- Automation: Streamlines feeding, labeling, and counting tasks.
- Flexibility: Accommodates multiple stick sizes for diverse product requirements.
- Quality and Support: American-made system with entry-level pricing and robust post-sale support.

The HL-60 delivers precision and efficiency in a space-saving design, making it an excellent choice for cost-conscious manufacturers.



The LB30 Lip Balm Filler, a semi-automatic system tailored for hot melt filling, cooling, and capping lip balm sticks and can fill up to 30 units per minute.

Beauty Manufacturing News

The beauty manufacturing industry is poised for continued growth through 2025, driven by technological advancements, changing consumer preferences, and expanding global markets.

Cosmoproject and Ancorotti Cosmetics Combine Forces to Create Enhanced Beauty Manufacturer

Clearwater International has advised Cosmoproject, an Italian contract manufacturer of skin care products, on its combination with Ancorotti Cosmetics, a contract manufacturer of cosmetic products.

Cosmoproject is recognized for its skin care formulations and manufacturing capabilities, while Ancorotti Cosmetics is known for its cosmetic solutions. The combined entity will offer a range of services to global beauty brands, including research and development, formulation, manufacturing, and packaging.

Ancorotti Cosmetics serves more than 300 international clients, including some of the most rapidly growing brands in the industry, per an official announcement, generating over 85% of its sales from foreign markets.

The combined entity is expected to generate more than €220 million in revenue and employ more than 800 individuals by 2025. The transaction is slated for completion by the end of the first quarter of 2025.

Courtesy of ProSys

Amelia Knight Cosmetics Invests $5 Million in New China Production Facility

Amelia Knight Cosmetics has announced a $5 million investment in a new 24,500-square-meter production facility in China, marking a significant milestone for the family-run business.

Set to open in 2025, the factory will consolidate operations under one roof, covering dispensing, mixing, filling, and finished goods assembly. This shift will streamline production through a lean model and increase annual output to 243.5 million units, supporting the company's goal to double revenue by 2028, per the brand. Amelia Knight's comprehensive five-year growth plan includes expanding production capabilities, introducing a wider product range, and bolstering infrastructure to support both existing customers and new business opportunities globally.



Amelia Knight Cosmetics has announced a $5 million investment in a new 24,500-square-meter production facility in China.

The facility will feature a dedicated skin care floor to expand global services for skin care and body care products. This move builds on the success of Amelia Knight's U.K. sites while solidifying China as a key manufacturing hub for the brand. It also complements the growth of the consumer-oriented skin care brand, Glow Hub, known for viral favorites like the Scar Slayer Serum and Baby Beam Glow Base, now available at various retailers worldwide.

Chairman David Salmon shares, "The new factory is a pivotal step in our long-term strategy to bring all operations in China under one roof. This investment creates exciting opportunities for our team, partners, and customers."



Ancorotti Cosmetics serves more than 300 international clients, including some of the most rapidly growing brands in the industry, per an official announcement, generating over 85% of its sales from foreign markets.

Dow, Brivaplast, and TecnoGi Collaborate on Circular Materials Solution for Luxury Goods Industry

Dow, Brivaplast, and TecnoGi are collaborating to revolutionize sustainability and promote circularity within the luxury goods sector by repurposing high-quality materials that would otherwise go to waste. This initiative involves repurposing perfume caps manufactured with Dow's Surlyn resin that do not meet the strict production standards required for luxury packaging. Instead of discarding these materials, the resin will be reprocessed and used to create premium footwear and leather goods, giving them a second life in high-end products.

From top: courtesy of Amelia Knight; Image by Ale at Adobe Stock



Amelia Knight Cosmetics' facility will feature a dedicated skin care floor to expand global services.

This innovative approach not only reduces waste, but also showcases a strong commitment from industry leaders to minimize their environmental impact. By integrating sustainable practices into their production processes, these companies are setting a new benchmark for environmental responsibility in luxury manufacturing, proving that elegance and eco-consciousness can go hand in hand.

Imran Munshi, global consumer market segment leader at Dow, says, "Our collaboration with Brivaplast and TecnoGi comes at a time when demand for sustainable materials and packaging solutions continues to grow. At Dow, we recognize our role in going faster and further to find solutions to accelerate the circular economy for plastics across European industries and know our customers expect nothing less. We're proud to show what can be achieved by working together across the value chain, and the benefits for all of keeping valuable materials in the loop for longer."



Dow, Brivaplast, and TecnoGi are repurposing perfume caps manufactured with Dow's Surlyn resin that do not meet the strict production standards required for luxury packaging.

From top: courtesy of Amelia Knight; Dow



The evolution of contract manufacturing is reshaping beauty product development.

Marco Roda, head of business development at Brivaplast, says, "At Brivaplast, we maintain the highest standards for our products. This collaboration allows us to uphold these standards while minimizing post-industrial scrap and contributing to a more sustainable future."

Customization and Personalization

According to a 2023 NIQ report[b], "Consumers are increasingly looking for brands and products that feel like they were made just for them, and can solve their unique needs. This trend is increasingly manifesting in the exploration of 'taboo topics,' including products providing solutions for menopause, aging, men's cosmetics, acne acceptance, sexual health, mental health, and more. Personalization and inclusivity are targeting the consumer, not the mass market."

Contract manufacturers cater to this growing demand with adaptable systems designed for small-batch production and bespoke formulations. Whether it's skin care crafted for unique skin types or hair care with customized blends, they empower brands to deliver personalized solutions that resonate with consumers and drive sales growth.

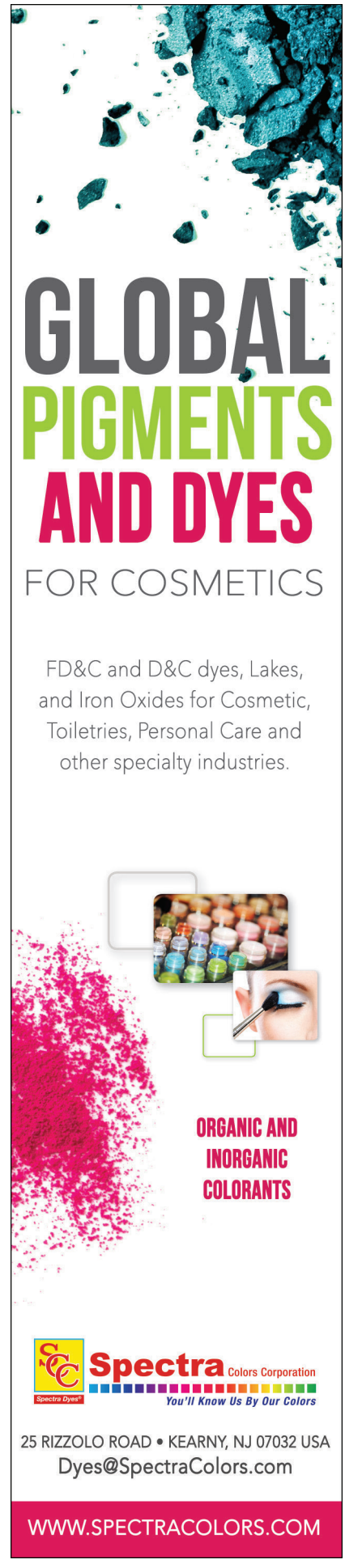
The Future of Contract Manufacturing in Beauty

Going forward, contract manufacturing will further drive innovation, sustainability, and personalization in the beauty industry. With their technical know-how and adaptability, manufacturers enable brands to scale efficiently, innovate quickly, and meet evolving consumer needs.

The evolution of contract manufacturing is reshaping beauty product development. By forming strong partnerships, brands can create cutting-edge formulations, deliver sustainable and personalized experiences, and thrive in a dynamic market. ■

[b]https://nielseniq.com/global/en/insights/education/2023/2023-beauty-personalization-innovation/

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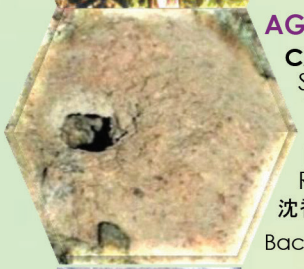
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AGARWOOD RESINS מעלה (אשאן מעלה) (קטורת)

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



AGARWOOD RESINS מעלה (אשאן מעלה) (קטורת)

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



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

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

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

TSCA 列出 | FEMA GRAS 列出 | DHHS 列出

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

Lonicera Japonica Plant



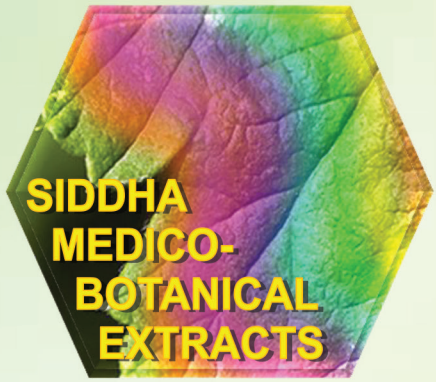
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独创的植物防腐剂(水溶性)适用于化妆品配方

CAMPO PLANTSERVATIVE WMr (Jojoba Oil)

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



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天然色剂

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

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

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

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

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The rise of clean hair care continues to reflect consumer demand for sustainable and non-toxic formulations, while the skinification of hair care brings advanced skin care-inspired technologies to the forefront of treatment options.

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FROM SCALP CARE TO INCLUSIVITY: HOW HAIR CARE IS EVOLVING

The rise of clean hair care continues to reflect consumer demand for sustainable and non-toxic formulations, while the skinification of hair care brings advanced skin care-inspired technologies to the forefront of treatment options.

The hair care industry is evolving at an unprecedented pace, paving the way for exciting trends that are reshaping how consumers approach their hair routines. Looking ahead to 2025, a few key movements will dominate the landscape, from the growing emphasis on scalp care as the foundation of healthy hair, to innovative styling trends that celebrate individuality and creativity. The rise of clean hair care continues to reflect consumer demand for sustainable and non-toxic formulations, while the skinification of hair care brings advanced skin care-inspired technologies to the forefront of treatment options. Additionally, inclusivity is becoming a defining pillar of the industry, with brands expanding product offerings to cater to diverse hair textures, needs and cultural identities. These shifts highlight a comprehensive transformation in hair care, where wellness, sustainability and representation go hand in hand with performance and innovation.

Hair Product Sales Surge in the Prestige Market

According to a 2024 Circana report[a], hair product sales in the prestige market have experienced a 10% increase in dollar value, driven by growing consumer interest in high-quality, performance-focused solutions. Styling products and treatments are the fastest-growing segments within the category, reflecting a shift toward more specialized hair care routines. Premiumization is playing a crucial role in this growth: hair products priced above $30 are seeing growth three times higher than lower-priced alternatives. These premium products now account for 25% of unit sales, a notable rise from 15% just three years ago, indicating a strong willingness among consumers to invest in elevated hair care experiences. The prestige hair market also highlights a profound shift in sales channels. It is currently the only beauty category where most sales occur online, underscoring the importance of e-commerce in reaching today's tech-savvy consumers. Online sales within this sector are growing at a double-digit pace, fueled by the convenience of digital shopping, personalized recommendations, and the availability of exclusive product lines. This rapid growth shows no signs of slowing down, as consumers increasingly turn to online platforms to discover and purchase premium hair care solutions. These insights not only reveal changing consumer preferences, but also underscore the growing demand for innovative, high-end hair care products that deliver tangible results.

Top Hairstyles and Hair Concerns for 2025

The beauty industry thrives on innovation and evolving consumer preferences. Spate's 2025 trend forecast[b] offers an in-depth analysis of emerging developments in the hair care and hairstyling segment.

[a]https://www.circana.com/intelligence/press-releases/2024/us-prestige-beauty-industry-sales-grow-by-8-in-the-first-half-circana-reports/

[b]https://www.spate.nyc/2025-predicted-beauty-trends

By examining billions of search signals and TikTok trends, Spate uncovers the intricate needs and priorities of today's beauty-conscious consumers. Key insights include:

- Rising interest in trending hairstyles
- Increased focus on scalp health and care

This comprehensive analysis provides valuable guidance for beauty professionals, brands and enthusiasts. Whether your goal is to refine product offerings, optimize content strategies, or stay ahead of the latest industry trends, this forecast serves as a crucial resource for navigating the future of hair care.

Top 5 Hairstyles Search Terms

From bold color experiments to effortlessly polished braids, here are the hairstyles poised to dominate in 2025 based on predicted search growth from Spate 2025 Beauty trend report.

1. Boho Knotless Braids (+50.8%)

Low-maintenance, stylish and protective, boho knotless braids take the top spot in 2025. Consumers love how these braids help retain hair length while offering a bohemian aesthetic that works for casual or formal occasions.

2. Cherry Cola Hair (+47.0%)

A nostalgic nod to the 1980s and 1990s with a modern twist, cherry cola hair involves deep burgundy hues with hints of red and brown. This striking hair color trend is as bold as it is versatile, suiting various skin tones beautifully.

3. High Burst Fade (+44.0%)

The high burst fade is emerging as a sharp, edgy haircut that combines precision and flair. Especially popular among younger men, this hairstyle's clean lines and tailored silhouette are designed to turn heads.

4. Mermaid Braids (+39.4%)

Mermaid braids echo the fantasy-inspired looks we're seeing in pop culture. With creative braided patterns and accessories, this intricate hairstyle is gaining traction, particularly for special events and photoshoots.



Mermaid braids echo the fantasy-inspired looks we're seeing in pop culture. With creative braided patterns and accessories, this intricate hairstyle is gaining traction, particularly for special events and photoshoots.

5. Heatless Hair Curlers (+36.9%)

The push toward hair health has spiked interest in heatless curling techniques that prevent damage. Heatless hair curlers offer a no-heat solution to achieve luscious waves or curls at home, making them ideal for busy beauty enthusiasts.

Top 5 Hair Care Search Terms

Spate's data also highlights the rising popularity of innovative hair care products, tools and treatments that blend functionality and fun.

1. Texturizing Powder (+50.7%)

Texturizing powders are a game changer for styling enthusiasts. Perfect for adding volume and grip, they're frequently used to achieve tousled, effortless textures. Expect brands like Redken and Davines to continue innovating formulations to meet demand.

2. Scalp Spa (+47.2%)

The "scalp spa" concept has surged as consumers equate scalp health with better hair growth. Treatments such as exfoliating scrubs and hydrating scalp masks provide a luxury self-care ritual while promoting healthier roots. (See **Scalp Care Takes Center Stage**.)

3. Thermal Hair Brushes (+34.9%)

With efficiency at the forefront of consumer desires, thermal hair brushes are seeing a surge in interest. These tools combine heat and brushing to style hair faster, catering to the "effortless but polished" aesthetic dominating beauty trends.

4. Hair Loss Topical Solutions (+33.8%)

With baldness and thinning on the rise as key concerns, searches for topical hair growth solutions (like minoxidil) have also increased. Consumers are eager for scientifically backed products with visible results.

5. Micro Bangs (+33.0%)

While not for the faint of heart, micro bangs offer a bold, avant-garde statement. These ultra-short bangs

Image by Lumixera at Adobe Stock

are making a comeback, especially in creative and fashion-forward circles.

The Intersection of Clean, Sustainable and Effective Hair Care

Isfahan Chambers Harris, a biomedical scientist, trichologist and founder of Alodia hair care, speaks to changing consumer dynamics: "I think the shifts in consumer behavior are largely driven by the consumers seeking products that cater to a wide range of hair types, textures and needs. They are desiring products that solve their unique challenges. I also think that consumers are more informed about product formulations and demand clean, effective and cruelty-free products. Lastly, I'm seeing a big shift towards customization. There's a growing expectation for personalized solutions."

The Quest for Sustainable Ingredients

Erica Cocilova, global brand president at Ethique Beauty, shares the challenges of sourcing clean, sustainable ingredients for hair care formulations: "The challenge isn't finding ingredients that work, it's finding ingredients that work and live up to our standards as a brand. We are incredibly picky about what we put into our products." Ethique's stringent criteria involve adhering to the strictest clean guidelines per EU standards. The brand dives deep into the supply chain and the origin of ingredients to ensure traceability and firm adherence to ethical practices.

A New Definition of Clean Beauty

Discussing how the clean beauty movement has influenced consumer expectations for hair care products, Cocilova suggests that while a clear definition of "clean" is lacking in the U.S. market, consumers are increasingly interested in a certain level of cleanliness in their products. Cocilova says, "'Clean' doesn't have a firm definition in the U.S.—which is why it's left up to consumers to decide what "clean" means and how important it is to them. Despite the confusion and blurred lines, we know that consumers in the U.S. are increasingly interested (and demanding) a level of clean in their products. We see the effect of this desire in the outsized growth of clean beauty products vs. categories at large, and in the adoption of clean programs and standards by the largest beauty retailers in the world (e.g., Ulta's Conscious Beauty Program)." She adds, "We're proud that we live up to these standards, and we're continually challenging ourselves to improve our formulations to protect people and the planet without compromising effectiveness. And sit alongside the best curation of brands on Ulta Beauty's shelves as they also pursue conscious beauty innovations, as the consumer comes to expect a clean product inside and out."

The Effectiveness of Clean Hair Care

Addressing whether clean hair care can truly deliver salon-quality results, Cocilova says, "Absolutely! But it's a battle that we are unfortunately still fighting every day–that it's somehow impossible for products to be clean and sustainable, and also highly effective, to deliver an incredible result for your hair and skin." Cocilova adds, "Beyond clean ingredient sourcing, we have gone one step further on a few key ingredients–and have found direct sourcing partners. Specifically, our coconut oil is super nourishing for hair and skin, without being heavy or overly greasy. It comes from a women's cooperative in Samoa. They produce organic, virgin coconut oil through a network of small farmers all around their native island. Purchasing their oil ensures we pay a fair price for their product and that the money is reinvested back into their communities and environment." Ethique leverages a specific manufacturing process that allows it to select and maintain the full benefits of each active ingredient in their products. The brand's commitment to clean and effective product development has been proven with third-party clinical tests, offering consumers an optimal option for their hair care needs.

Scalp Care Takes Center Stage

According to a report from Kline & Company[c], scalp care is emerging as

[c]https://klinegroup.com/articles/top-trends-to-watch-in-beauty-and-wellbeing-for-2025-and-beyond/



Hormonal fluctuations impacting hair thickness, particularly postpartum hair loss or menopause-related thinning, have become a major conversation point amongst consumers.

Image by boyloso at Adobe Stock

a key focus in the hair care industry, driven by increasing consumer awareness of the scalp's role in promoting healthy hair. Notably, per Spate data, top hair worries reveal a growing consumer focus on hair health, density and scalp issues.

1. Psoriasis Treatment (+3.4K searches)

Consumers are increasingly seeking products to manage scalp psoriasis and other related conditions. Searches for solutions that alleviate dryness, redness and irritation are spiking, creating opportunities for brands offering tailored medicated shampoos and ointments.

2. Baldness (+2.9K searches)

Hair thinning and baldness remain top concerns, with rising interest in preventative and restorative solutions. Scalp treatments, hair growth serums and styling products for thinning hair are all opportunities for innovation.

3. Sensitive Scalp (+2.0K searches)

Scalp sensitivity is leading consumers to search for gentle formulations free from harsh sulfates, parabens and synthetic fragrances. Products labeled hypoallergenic or designed for sensitive scalps are gaining popularity.



Viviscal has been helping millions of women achieve healthier, fuller hair for over 30 years.

4. Hormonal Hair Loss (+1.7K searches)

Hormonal fluctuations impacting hair thickness, particularly postpartum hair loss or menopause-related thinning, have become a major conversation point. The demand for targeted solutions, including supplements and topicals, continues to grow.

5. Waxy Hair (+1.1K searches)

This lesser-discussed issue is becoming a significant concern. Consumers are looking for solutions to counteract product buildup or scalp imbalance, causing waxy film on hair strands. Detox hair masks and clarifying shampoos are poised for growth in this area.

Scalp Detoxing

Deep cleansing and exfoliation—collectively known as scalp detox—are leading this growth, targeting residue from products, dirt, oil buildup and dead skin cells. Inspired by skin care, scalp detox incorporates both chemical exfoliation (using alpha-hydroxy acids or enzymes) and mechanical methods (such as brushes or scrubs with sea salt or coffee grounds). While these treatments are popular for at-home use, professional services are also expanding, with hair salons, scalp clinics and even medical institutions offering specialized treatments. Cocilova says, "Generally, we're continuing to see huge growth in scalp care across both premium, masstige and mass channels–and getting that feedback from retailers as well. There's still so much growth to be had, but consumers are starting to really connect the concept of hair health to scalp health. And that having a balanced, healthy scalp creates the best environment for healthy hair to grow. Further, because scalp care is, in essence, skin care, consumers are really demanding clean ingredients that are better known in skin care: niacinamides and amino acids, to name a few. We lean toward a few interesting ingredients in our best-selling Scalp Shampoo Bar–neem seed oil and karanja oil–those that have natural properties to help balance the skin on our scalp and boost overall hair health." Cocilova adds, "When it comes to repair, we see that this hair concern continues to be a top one among consumers–and we're sure that many brands see and hear the same thing given the number of new products, brands and entrants into the space. True bond repair technology is rare, but there is a lot more consumer awareness around the simple ingredients and regimens that can promote true strength in your hair (more strength = less breakage): that the right mix/balance of moisture and protein is the unlock. For rinse-off products like ours, we focused on rice protein and shea butter to provide an optimal balance."

Focus on Growth

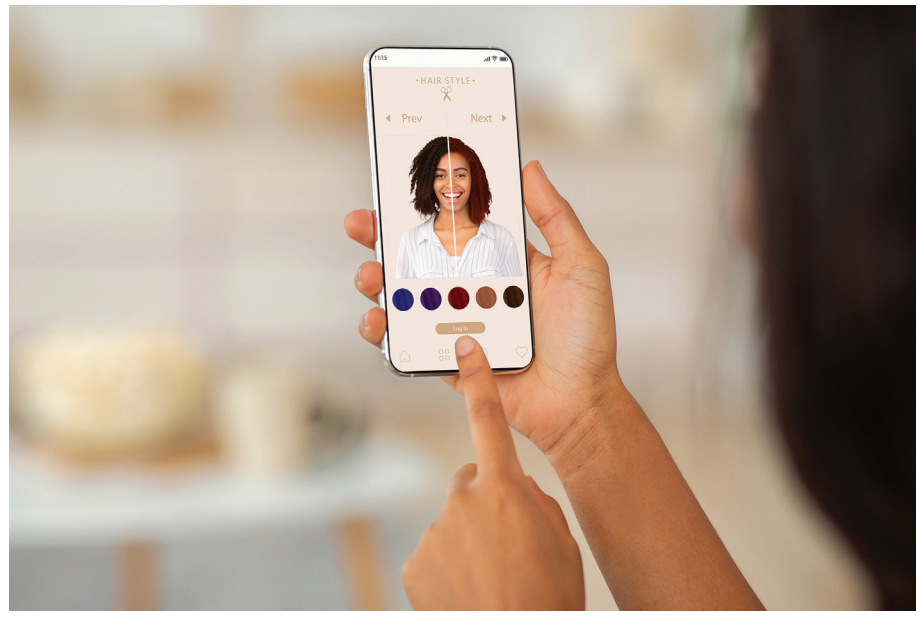
On the emerging trends in hair and scalp care, Caitlin Dodd, director of specialty hair care at Church & Dwight (manufacturer of Topik and Viviscal hair care) stated, "We've observed that consumers are becoming increasingly invested in the overall health of their hair compared to a few years ago. One of the key indicators of hair health is hair growth. Viviscal, a trusted name for over 30 years, has been helping millions of women achieve healthier, fuller hair with our clinically proven supplement. We are excited to continue offering a powerful formula that meets this important trend in hair care."

Scalp Care & the Skinification of Hair Care

Nutrire is a new line dedicated to skin-centric hair care. It is reportedly the first to offer a personalized system that addresses scalp and strand needs. It features two treatment scalp serums, three shampoos and four tailored conditioners. As a nod to the brand's Italian roots, Nutrire

Courtesy of Church and Dwight, Viviscal

means “to nourish,” and represents the brand’s commitment to nurturing hair from follicle to tip through a customizable regimen. Developed in collaboration with estheticians, trichologists and hairstylists, the core of Nutrire’s formulas is the proprietary Complex8 technology, a blend of science-backed and naturally derived ingredients that block DHT, the hormone that weakens hair that causes it to shed, allowing hair follicle and strand to remain open to receiving nutrition for healthier, stronger hair. Each formula was developed to target specific concerns using skin care ingredients such as niacinamide and lactic acid, naturals such as red clover and mango butter, and clinical actives such as Peachcalm and Nutrinvent Balance. Clariss Rubenstein, celebrity hairstylist and Nutriere brand ambassador, says, “This is how everyone should be caring for their scalp and strands. I fell in love with the concept of the line when I first learned about it and the second I tried the scalp serums, shampoos and conditioners, I was sold. In my experienced, professional, product loving, hair-health obsessed opinion, Nutrire is what has been missing from hair care.”



The latest innovative hair care technology leverages Next Gen AI to provide consumers with hyper-realistic, interactive hair color experiences.



Alodia Haircare is expanding its reach with products now available in 650 Target stores nationwide.

Beauty Tech and Color

Revieve, a specialist in AI-powered beauty and wellness solutions, has launched Hair Color Artist, a virtual try-on solution that changes how consumers explore and experience hair color transformations. Powered by Revieve’s proprietary BeautyML and Google Cloud’s robust infrastructure and Vertex AI platform, the Hair Color Artist delivers hyper-realistic, personalized and interactive hair color experiences. Sampo Parkkinen, CEO of Revieve, says, “At Revieve, we’re focused on driving meaningful impact for consumers and brands. Hair Color Artist transforms how consumers explore hair color by delivering an engaging and confidence-boosting experience. For brands, it’s an opportunity to increase conversions, grow customer loyalty and stand out in a competitive market.” Paul Tepfenhart, global director of retail industry strategy and solutions, Google Cloud, says, “Generative AI has the power to create highly personalized experiences that help organizations foster deeper customer relationships and boost engagement. With Revieve’s expertise and Google Cloud’s leading AI

From top: Image by Prostock-studio at Adobe Stock; courtesy of Alodia Hair Care

technology, organizations can deploy powerful solutions that solve industry challenges and significantly improve business performance."

Inclusive Hair Care Expanding into Bigger Markets

Alodia Haircare, a Black-owned brand specializing in scientifically formulated natural hair care products, is expanding its reach with products now available in 650 Target stores nationwide. This move demonstrates the growing demand for clean, inclusive hair care solutions that cater to diverse hair types and concerns. With its range of products designed for textured hair and scalp health, Alodia is making waves in the beauty industry as a brand that truly prioritizes consumer needs.



While many hair treatments on the market may contain potentially harmful or irritating ingredients, Magic Sleek is formulated with a focus on clean, sustainable alternatives.

The Evolution of Inclusivity in Hair Care

Harris says, "Inclusivity in hair care was once seen as a niche market focused on ethnic or specialized hair types, often limited to smaller brands or ethnic beauty stores. However, now, it is a bigger priority, with brands and retailers expanding their product offerings to address a broader spectrum of hair textures and concerns, acknowledging that diverse needs are not niche at all but are universal."

Targeting Underserved Communities

When asked which demographics to target, Harris emphasizes inclusivity: "Individuals with textured hair (curly, coily and kinky hair types), consumers with scalp problems, and aging consumers (45+ years) can all benefit from a brand that focuses on solving their problems." Finally, Harris shared her insights on how brands can effectively educate their consumers: "Being authentic in the way that you speak to consumers is critical in getting your message across about the products you are designing. If there is a founder story that is relatable, this always goes a long way in gaining customers' loyalty. Also, educating consumers about products designed for different hair care needs is essential for building trust, fostering loyalty and ensuring customers can make informed choices."

Safe, Healthy Alternative to Traditional Chemical Hair Straightening Treatments

Magic Sleek, Inc. claims its products are the first and only on the market approved by the Occupational Safety and Health Administration (OSHA), Food and Drug Administration (FDA) and European Union (EU), setting a new standard for safety and efficacy in the beauty and hair industry. Magic Sleek sets itself apart by prioritizing safety, transparency and effectiveness. While many hair treatments on the market may contain potentially harmful or irritating ingredients, Magic Sleek is formulated with a focus on clean, sustainable alternatives. This makes it a safer and more environmentally conscious choice for consumers seeking long-lasting results without compromising their health or well-being. "Magic Sleek is free of formaldehyde and harsh chemicals," says Cynthia E. Vona, M.D., executive director of Pansophy Medical Consultants. "It is a safe and effective hair treatment. Personally, I am delighted with my results. As a board certified internal medicine physician, health and safety are fundamental to me." OSHA found that some hair smoothing products may contain formaldehyde, release formaldehyde at levels above permissible limits during use, and be mislabeled—all of which can pose health risks. Based on air testing and product sampling, OSHA, the FDA and department of health agencies in various states across the United States have issued warnings to manufacturers that violated rules for formaldehyde labeling, or have issued health warnings to salons and consumers about formaldehyde in hair smoothing products. Olga Isakov, founder and CEO of Magic Sleek, says, "At Magic Sleek, our mission has always been to

Image by Pixel-shot at Adobe Stock

provide a safer, healthier alternative in the hair industry. I'm deeply committed to ensuring that our hair products not only deliver exceptional results, but also meet the highest safety standards. We're proud to be the only hair treatment brand that is fully compliant with FDA, OSHA and EU regulations, offering customers peace of mind along with beautifully smooth, manageable hair."



Hair bond treatments are significantly growing in popularity as consumers are increasingly looking for ways to repair damaged hair and reduce breakage by strengthening the hair's internal bonds.

Bond Treatments & Serums

"As we all know," begins Dina Rosenbloom, CEO of Hairstory, "there has been a growing trend toward the 'skinification' of hair care." Rosenbloom attributes this surge in popularity to an increased understanding of hair care and the need to nurture our scalps and hair like we do our faces: "Also, there have been massive advancements in innovation in the bond repair arena, so many more brands are taking advantage of the unique formulations that offer solutions for clients."

The Longevity of Hair Bond Treatments

Rosenbloom is firm in her stance that hair bond treatments are not a temporary fad, but a long-term development in hair care. "I definitely see bond treatments as a long-term, here-to-stay innovation," she says. "Broken bonds are a reality in the chemical treatment process, and, with the rise in air pollutants and other external aggressors, hair gets damaged and dry. Bond Repair products aid in the repair of these broken and damaged bonds."

The Impact of Hair Bond Treatments on Salon Services and At-Home Care

Discussing bond treatments further, Rosenbloom explains their benefits for both salon services and at-home care routines: "Bond Treatments, like ours, aid in the salon service and provide optimal visible results. Dozens of our network Hairdressers and Colorists helped us test these products as aids during the salon service as this was one of our objectives." At home, she says, "these same products can be used separately or in combination for repair, softness, shine and color retention."

The Crucial Role of Consumer Feedback

When asked how important consumer feedback is to the brand, Dodd emphasizes, "Consumer feedback is incredibly important to us, not only in the development of our hair care products but also in how we engage with our audience. We understand that there can be a stigma surrounding hair thinning and we aim to inspire hope in our consumers. Our Toppik Fill Me In was specifically developed in response to consumer requests for a hair product designed to precisely fill in and perfect areas along the hairline. We listened to our customers' needs for precise application and created a product dedicated to addressing this issue." ■



"Hair cosmetics" have been growing in popularity as an easy an affordable way to hide the effects of hair loss.

From top: courtesy of Hairstory; Church and Dwight, Toppik

The Future of Beauty Packaging: **Sustainable, Innovative, and Convenient**

Explore the latest packaging trends in the beauty industry, highlighting sustainability and decorative glass designs that merge elegance and innovation to captivate consumers.



Sustainable packaging strategies can span glassification concepts, monomaterial designs and more.

Image by Africa Studio at Adobe Stock

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The future of beauty packaging lies in its ability to adapt to the evolving demands of consumers and the environment. This means embracing sustainability through the use of recyclable materials, refillable containers, and eco-friendly packaging designs. Additionally, innovation will play a key role in creating smart packaging that enhances the user experience and incorporates technology to provide personalized solutions and product information. Convenience will also remain a priority, with a focus on travel-friendly, easy-to-use, and on-the-go packaging formats.



Maria Alexeeva, sales manager at McKernan Packaging Clearing House said, "Packaging that is excess to one enterprise can be extremely valuable to another."

Sustainability Meets Savings

Adam McGinley, purchasing manager at McKernan Packaging Clearing House explains, "Since 1967, the surplus purchasing program has allowed packaging that might otherwise end up in a landfill to be repurposed and be made available for immediate use by another company. Recycling is another option, but our precycling program helps avoid the extra energy necessary to the recycling process while allowing these products to go back into the industry right away."

Maria Alexeeva, sales manager at McKernan Packaging Clearing House, says, "Packaging that is excess to one enterprise can be extremely valuable to another. Given the significant impact of packaging on consumer purchasing decisions, companies can benefit from our surplus inventory. These high-quality items come from multinational marketers, while being economically and ecologically conscious."

McGinley agrees, "The surplus inventory paired with McKernan's unique small order program creates more opportunity for businesses of any size. Utilizing the repurchase program gives companies an opportunity to have fewer financial obligations by providing an option to purchase a lower minimum order quantity. These orders will be at a significantly lower cost than if customers went directly to the manufacturer, while the product quality remains the same."

"Our Surplus programs are perfect for companies that cannot wait due to long lead times and large minimums, or simply can't or won't pay a manufacturer's full price," adds Alexeeva. "Buying surplus not only saves money on packaging, but also provides a budget-friendly opportunity to source components sustainably."

"Brands considering a new product line or a complete packaging change and don't want to limit their options have the opportunity to use the unused and unbranded surplus stock," McGinley says. "These items provide lower financial expenses and risks while still delivering a high-quality product."

"Large corporations have already invested millions of dollars in research to determine what works best," Alexeeva explains. "Our Surplus Program represents an excellent opportunity to buy brand-new, unused quality packaging components at discounted rates. McKernan has established a widespread network of packaging suppliers, which sources a variety of components-- all available in our Best Value line."

Increased Recyclability of Materials

Enhancements in packaging materials and design enable greater recyclability, contributing to a circular economy and reducing environmental impact. This includes the development of innovative materials that are easier to recycle, as well as design strategies that simplify the recycling process. Additionally, advances in recycling technologies and infrastructure are expanding the range of materials that can be effectively recycled.

APC Packaging Introduces Mono-Material Color Cosmetics Collection

APC Packaging has launched the Mono-Material Color Cosmetics Collection. This collection showcases APC Packaging's commitment to sustainability by utilizing either 100% PET or PP materials across the entire product range.

Image by romaset at Adobe Stock



Each product in the APC Mono-Material Color Cosmetics Collection can be designed with up to 50% PCR (PP 5g Stick is capable of 100% PCR), enabling beauty brands to reduce their environmental impact without compromising on quality.



Max Farrow, marketing manager, Nuon Medical Technologies says, "Sustainability is a cornerstone of our innovation. Our latest packaging designs incorporate biodegradable materials, post-consumer recycled plastics, and modular refillable systems."

The collection includes the following pieces:

- 100% PET 3.5 g Lip Stick
- 100% PET 5.2 ml Lip Balm
- 100% PP 5 g Stick (bottom fill)
- 100% PP 1.3 g Twist Pen
- 100% PP 1.8 g Lip Stick
- 100% PP 0.06 g Twist Pen

Each product in this collection can be designed with up to 50% PCR (PP 5 g Stick is capable of 100% PCR), enabling beauty brands to reduce their environmental impact without compromising quality or aesthetics. The use of mono-materials such as PET and PP ensures that the packaging aligns with global sustainability goals.

Arcade Beauty to Eliminate Non-recyclable Designs by 2030

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

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

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

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

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

Smart, Sustainable Packaging

Max Farrow, marketing manager, Nuon Medical Technologies, says, "In 2025, Nuon is proud to introduce its Smart Applicator Series, a range of packaging solutions designed to elevate user experiences. These applicators feature, for example, integrated NFC technology, enabling personalized skin care regimens and seamless consumer engagement. Our devices combine functionalities such as phototherapy, microcurrents, and pulsed electromagnetic fields (PEMF), delivering unparalleled efficacy and experience."

Sustainability at the Forefront

Farrow adds, "Sustainability is a cornerstone of our innovation. Our latest packaging designs incorporate biodegradable materials, post-consumer recycled plastics, and modular refillable systems. By transforming devices into keepsake tools, we reduce waste and encourage long-term use. Nuon also operates with green manufacturing practices, including solar-powered facilities and water conservation initiatives."

He concludes, "In 2025, we anticipate a surge in demand for device-topical hybrids, eco-conscious materials, and interactive packaging designs that enhance transparency and consumer engagement."

L to R: Courtesy of APC Packaging; Global Cosmetics Industry

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The Glassification of Packaging

"Glassification" refers to the increasing use of glass in beauty and cosmetic packaging. The reasons for this shift are largely driven by consumer and regulatory demands for sustainable alternatives to plastics. According to a 2025 report from Market Research Guru[a], the global cosmetic and perfume glass packaging market size was valued at $3965.38 million in 2022. It is expected to expand at a CAGR of 5.51% during the forecast period, reaching $5471.95 million by 2028., with beauty and personal care among the driving forces.

Glass offers a host of benefits:

- Sustainability: Glass is fully recyclable without losing quality. Unlike plastics, it contributes to a circular economy.
- Preservation: Being inert and non-reactive, glass preserves product quality by shielding formulas from oxidation and contamination.
- Premium Appeal: Glass' weight, clarity, and gloss lend a luxurious feel, appealing to consumers who value aesthetics as much as functionality.

Luxury Looks for Glass

The beauty industry is synonymous with glamour, and glass packaging serves as the perfect canvas for creating luxury aesthetics. Premium skin care and fragrance brands have embraced techniques like frosted glass, metallic accents, and intricate embossing to elevate the look and feel of their products.

Balancing Luxury and Sustainability

One of the industry's biggest challenges is balancing opulence with eco-consciousness. Consumers expect beauty brands to contribute to the sustainability movement while maintaining the high-end feel they're accustomed to. Enter lightweight glass.

Lightweight glass reduces both the material's carbon footprint during production and shipping emissions, thanks to its reduced weight. Despite being lighter, it retains the visual luxury and durability that glass offers. Furthermore, refillable glass products are gaining traction in the industry, especially for skin care and perfume packaging.

An example of this is Guerlain's iconic "Bee Bottle," introduced with a refillable offering, allowing customers to keep their ornate glass bottles while reducing waste and SGD Pharma's PCR Glass Bottles, featuring 20% post-consumer recycled (PCR) glass.

Focus on Sustainability and Innovation

Wheaton, a manufacturer of glass packaging for the perfumery and cosmetics industries, supports this trend with the Ecoglass Line, an innovative approach to ecodesign. This line underscores the sustainable potential of glass packaging by promoting the principles of the circular economy. It is specifically engineered to minimize the consumption of raw materials extracted from nature, aligning with the company's commitment to environmental responsibility.

Bottles

Wheaton also recently added a new 200 ml bottle, designed from a proposal for refill, promoting the circular economy. According to the company, the bottle is lightweight, with about 20% less glassy mass than traditional bottles, resulting in a significant reduction in energy consumption, as well as a reduction of about 15% in CO_2 emissions.

The screw termination allows the refilling of the perfume, encouraging the conscious use of the packaging, in addition to facilitating the recycling process, uniting innovation and environmental responsibility.

Decoration

As for the innovations in decoration, Wheaton created Hot Stamping tapes. The technique consists of a decoration process through a thermal tape, which



Decorative glass designs are transforming the fragrance and beauty market, blending artistry with sophistication to enhance consumer appeal.

Image by micro at Adobe Stock

[a]https://www.wicz.com/story/52168563/cosmetic-and-perfume-glass-packaging-market-growth-2025-key-industry-trends-share-and-demand-by-2033

produces recordings in various colors, with many options of differentiated effects.

Another technique created by Wheaton is Crystal Effect Painting, obtained by applying a special varnish that creates a particular effect around the painting, giving each bottle a unique aesthetic. This process values the sophistication of glass packaging, providing not only a visually captivating appearance, but also a tactile feel.

Among Wheaton's innovative decoration techniques, Marble Effect Painting stands out for its ability to imbue bottles with a sense of elegance, sophistication, and timeless beauty. Inspired by the look and texture of natural stone, this technique creates a modern, refined aesthetic that bridges technology and nature. Each bottle becomes a unique piece, offering a distinctive depth and character that resonates with consumers on a deeper level.

New Packaging Concepts for Added Convenience

Dana Peterson, director of marketing and communications, ICONS|ICS, says, "Chubby pansticks are one of the hottest trends in the stick category for lip and cheek formulations as well as multi-functional skin care formulations for the face and body. And at ICONS|ICS, we have several new chubby panstick options, including new mono material PP chubby sticks, which are ideal for color cosmetic, skin care, body care and even hairstyling stick formulations. They are a travel-friendly, versatile option that can be used anytime, anywhere – just swipe on and go."



Dana Peterson, director of marketing and communications, ICONS|ICS says, "Chubby pansticks are one of the hottest trends in the stick category for lip and cheek formulations as well as multi-functional skincare formulations for the face and body."

Peterson continues, "Stick packaging combines versatility, sustainability, and customization to align with your brand vision. From finishes like a metallic spray, soft-touch and metallization to sustainability-driven options such as in-mold matte finishes with embossed or debossed logos, ICONS|ICS help brands create impactful and eco-friendly packaging."

Peterson concludes, "Sticks suit a wide range of formulations and we have a variety of options in various shapes and sizes including recyclable mono-material PP or PET sticks with option to add PCR, refillable options, top fill or back fill, and airtight options."



The plastics industry is the fastest-growing source of industrial greenhouse gases in the world and is estimated to account for 19% of the global carbon budget by 2040.

The Benefits of Sustainable Packaging Materials

Sustainability is a growing priority in beauty and personal care products.

"Our materials enable companies to reduce the use of fossil fuels and lower their carbon footprint," says Heidi Peltola, chief product officer

From top: Courtesy of ICONS Beauty Group; Sulapac

at Sulapac. "But there is more: Sulapac materials leave no permanent microplastics or toxic residues behind. By opting for Sulapac, companies can contribute to healthier ecosystems and improve human well-being."

Peltola also emphasizes the recyclability of Sulapac materials, stating, "They can be effectively—and almost indefinitely—recycled in a 'polymer-to-polymer' process. This lays the foundation for a truly sustainable, circular packaging industry. By joining Sulapac on this journey, beauty companies are building a better future for us all."

She adds, "The plastics industry is the fastest-growing source of industrial greenhouse gases in the world and is estimated to account for 19% of the global carbon budget by 2040. Improved recycling of conventional plastic is not enough to stop this detrimental development; more radical changes are needed."

For the beauty and personal care industry, Peltola outlines a clear path forward: "This means favoring refill concepts and choosing renewable materials that are also truly recyclable, not downcyclable. Using materials that do not add to the global problem of microplastic pollution is fundamental to securing a livable planet for our children. It also helps prevent the rise of severe diseases linked to the accumulation of microplastics in human organs."

Peltola adds, "A common challenge across our sector is that data on biobased and biodegradable materials in many Life Cycle Assessment (LCA) databases is outdated, and some evaluation methods show bias. For example, the environmental effects of oil drilling are largely ignored, while landfills are considered a sustainable end-of-life solution for conventional plastic, even though research shows that leaching chemicals threaten the quality of groundwater and microplastic release impacts wildlife and human health."

Peltola concludes, "Although most beauty companies have set ambitious goals and targets for their sustainability performance, the pace of change sometimes feels painstakingly slow. Instead of going out one pilot project at a time, companies could be more agile in the large-scale adoption of new sustainable concepts and materials. Due to the pressing environmental problems like climate change and the emerging threat of microplastic pollution, we must be bold in our actions–and act now."



Althea Skin's line of science-backed skin care products using Berlin Packaging's exclusive Airglass refill packaging system.

Reducing Costs

Moira Stein, insights and strategy consultant, Berlin Packaging, says, "There are a few things we recommend to help our customers reduce their packaging costs. Companies can streamline their inventory by sharing components across brands or products. For example, a hair care brand can use the same component for both shampoo and conditioner and only change the decoration. This can result in a price reduction by ordering a higher volume of the component."

Stein continues, "Increasing order quantities reduces the unit cost and helps reduce some fixed shipping costs. Partnering with a packaging supplier like Berlin Packaging who provides warehousing and inventory management makes this easier. We have locations around the globe and use near-site warehouses for maximum proximity to your facilities to save time and money. Our expert teams handle all the logistics from housing through delivery, so you don't have to. Lightweight packaging can also help reduce costs, like replacing a heavy wall jar with a thinner wall one. This reduces the cost of the actual packaging (and potential tariffs) as well as lowering shipping costs - both from the factory to the brand's warehouse or distribution center, and from the warehouse to the customer."

Stein concludes, "Althea Skin recently launched its line of science-backed skin care products using Berlin Packaging's exclusive Airglass refill packaging system. The recyclable glass containers are refillable and pair with recyclable plastic refill cartridges to support the circular economy and reduce packaging waste. The brand claims to use cartons that are FSC-certified and made in a women-owned, Zero Waste factory using solar energy." ■

Courtesy of Berlin Packaging



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HOW SKIN CARE CAN ESCAPE ITS INNOVATION SLUMP

The skin care market is undergoing a shift as consumers seek innovative and effective products that deliver long-term benefits. Brands must adapt to evolving consumer preferences by prioritizing longevity, medicalization and personalization.



How can brands of every price point innovate to break through the skin care category's malaise?

Image by Lightfield Studios at Adobe Stock

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Throughout 2024, skin care defied beauty's overarching prestige wave; according to Circana figures[a], U.S. prestige skin care sales grew just 3% in the first nine months of 2024, while mass grew 2%. The fastest-growing sector was actually masstige, or mid-range products, which grew six times faster than prestige.

This data points to a perception among consumers that there is insufficient distinctive innovation in the prestige space to justify the price tag; yet, as evidenced by masstige's strength, there is a clear desire to trade up from mass skin care.

(This trend line ironically comes at a moment when skin care concepts are driving prestige innovation and sales for scalp and hair care, hybrid makeup and body care.)

Jeffrey Martin, director of marketing, FP Labs, says, "At FP Labs we know that the beauty and personal care market has had a bumpy ride in 2024. We have seen inflationary pressures and regulatory mandates stress brand owners, large and small, across the industry. We know that as financial belts tighten, the opportunities to develop clever and innovative new products decrease."

How can brands of every price point innovate to break through the category's malaise? Here, *Global Cosmetic Industry* breaks down the top innovation targets for product development and marketing strategies in skin care.

Longevity Reshapes the Anti-aging Agenda

Skin longevity concepts boomed in 2024, turning up in both ingredient and product launches.

This includes biotech firm Debut's Deinde (Latin for "next, then, thereafter"), a consumer skin care brand that targets inflammaging and boosts skin longevity, as well as Estée Lauder's cross-disciplinary group of longevity experts focused on educating consumers to "rethink how they approach skin care and lifestyle" to shift from an anti-aging mindset to an age reversal focus.

Elsewhere, Mibelle Biochemistry's RejuveNAD technology, launched in late 2023, naturally stimulates the endogenous regeneration of NAD+ by activating the enzyme NAMPT, thereby making the skin appear as much as eight years younger.

Per Euromonitor data, launches with NAD+ claims, which are associated with skin and overall longevity, rose from roughly 100 in 2022 to nearly 500 in 2024 (as of August 2024).

Investments have followed the excitement around longevity.

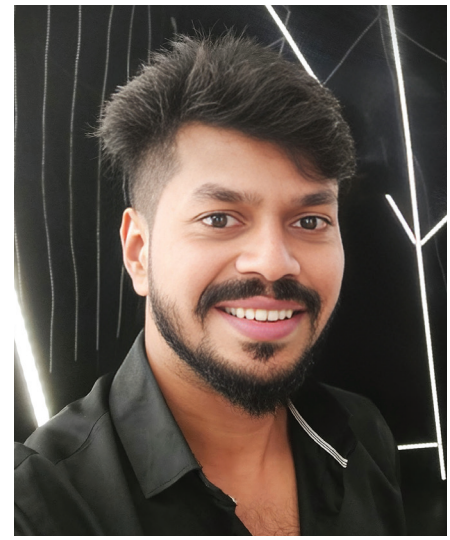
In November 2024, the longevity-focused skin care OneSkin closed a series A investment round, led by Selva Ventures, as well as PLUS Capital, Unilever Ventures, Able Partners and former investors SOSV and Meta Planet, bringing the brand's total funding to $20 million.

And, in January 2024, Swiss biotech health, aging and longevity company Timeline raised CHF 56 million ($66 million) in series D financing, including strategic investments from L'Oréal and Nestlé. The investment interest centered on Timeline's proprietary technology, Mitopure, which "unlocks a precise dose of the rare urolithin A molecule and promotes healthy aging."

The momentum toward longevity concepts is clear, though which ingredients will win the race remains unclear. Bhushan Dhumal, media relations team, Transparency Market Research, tells *Global Cosmetic Industry*, "While the anti-aging skin care market is thriving, it's not without challenges," as outlined below.

Intense Competition

The market is crowded, with both established brands and new players vying for attention. To stand out, brands must emphasize quality, innovation and a unique value proposition.



Bhushan Dhumal, media relations team, Transparency Market Research.

Skepticism Around Claims

Consumers are wary of exaggerated claims and false promises. Transparent communication and evidence-based marketing can help build credibility.

Regulatory Hurdles

Anti-aging products often fall under strict regulatory guidelines, especially in regions like the European Union. Compliance with these standards is essential to avoid legal issues and maintain consumer trust.

Economic Uncertainty

Economic downturns can impact consumer spending on non-essential items, including premium skin care. Offering affordable options without compromising quality can address this challenge.

The Future of Anti-aging Skin Care

The future of the anti-aging skin care market looks promising. As technology advances, we can expect even more innovative products that target aging at a deeper level.

Medicalization of Skin Care

The medicalization of beauty continues to create a feedback loop

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

Courtesy of Transparency Market Research

between the health and beauty worlds. StriVectin launched the TL Peptight Face Lift Serum ($89), the latest addition to its Tighten & Lift line, at Ulta Beauty, offering consumers a solution for visibly tightening, toning and contouring the face and jawline.

This "face lift in a bottle" was specifically formulated for peri-menopausal, menopausal and post-menopausal skin to significantly boost firmness, elasticity and the appearance of sagging and dark spots, per the brand.

The launch is in line with a wider medical aesthetic-beauty cross pollination of product innovation.

Medik8's newest launch, Liquid Peptides Advanced MP serum ($92, 30 ml), also leans into the medicalization movement. Specifically, the brand leverages a combination of bioengineered Dual MiniProteins that mimic neurtoxin treatments to smooth and firm the skin.

In fact, the serum is "clinically proven to reduce the appearance of expression lines in as little as 10 minutes, with 100% of participants reporting visible improvement."

The Dual MiniProteins reportedly "act like a perfectly shaped 'key' crafted to fit into the 'locks' of cell receptors responsible for producing collagen, elastin and hyaluronic acid within the skin," in effect mimicking the aforementioned neurotoxin aesthetic treatments.

The formulation's Growth Factor MiniProtein is said to help boost the skin's collagen, elastin and hyaluronic acid levels for firmer, healthier-looking skin.

Beta-Glucan Ingredient Technologies

Lancome helped solidify this trend with the launch of Génifique Ultimate, a skin recovery formulation that takes inspiration from beta-glucan-CM's application in medical wound dressing technologies.

The ingredient reportedly retains the skin's moist environment in wound dressings, thereby accelerating skin surface renewal and strengthening and repair of its moisture barrier.

Mibelle Biochemistry also manufactures a beta-glucan technology, CM-Glucan Forte, using baker's yeast. The supplier's magnesium carboxymethyl beta-glucan is claimed to rebalance the immune system of the skin, soothe irritations and strengthen the skin barrier.

As previously reported, beauty inspired by medical aesthetics fuels shoppers' demands for efficacy, precision and, in some cases, preventive care over reactive care.

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

The industry can expect to see rising popularity for lasers, peptide-based formulas and Botox-like treatments among consumers of all ages, as well as increased openness about the use of such services.

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



Lancôme's Génifique Ultimate reportedly helps "accelerate skin surface renewal, strengthen and repair skin's moisture barrier, soothe skin, provide antioxidant support, help improve firmness and help reduce the appearance of wrinkles," per the brand, helping "reverse visible signs of skin damage in 1 week."

Courtesy of Lancôme

Harnessing K-beauty's 2nd Boom

K-beauty remains a key player in the global skin care market. Known for their innovation in multi-step routines and groundbreaking ingredients (like snail mucin and ceramides), Korean beauty products have set remarkable trends globally.

L'Oréal's acquisition of Dr.G underscores the enduring influence of K-beauty. Samuel du Retail affirms this by sharing, "Dr.G is a well-known brand founded by a Korean dermatologist...rooted in his vision that everyone deserves healthy skin."

[b]https://www.mintel.com/insights/consumer-research/global-consumer-trends/

Products inspired by K-beauty trends, such as cushion foundations and essence mists, are now staples worldwide, proving that Korean innovation continues to shape consumer preferences. K-beauty had a major boom in 2015-2016, according to Google Trends' tracking of consumer search data, followed by a second, even larger spike in early 2024.

"In 2022, it [the global K-beauty market] was valued at approximately $91.99 billion," per Landing, "with North America contributing around $3.8 billion." Furthermore, the report[c] notes, "The U.S. market is expected to grow significantly, with forecasts predicting it will surpass $9.9 billion by 2032."

The boom has led to strong growth for K-beauty brands in the U.S. market, including Rael, Ma:nyo and Beauty of Joseon.

Samuel du Retail, president of L'Oréal Korea, said, "Following the successful acquisition of 3CE, we are glad to welcome a second Korean brand into L'Oréal and contribute to bringing the best of Korean beauty to the world. Dr.G is a well-known brand founded by a Korean dermatologist, rooted in his vision that everyone deserves healthy skin. Having Dr.G brand and Gowoonsesang talented teams with us will further strengthen L'Oréal engagement with the Korean beauty ecosystem and allow us to expand the reach of K-beauty globally."

A 2025 trend analysis from Spate[d] points to K-beauty's influence in consumer search trends in the U.S. Per the company, milky toners are expected to be a top grower based on Google search volume in 2024: "[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…"



Products inspired by K-beauty trends, such as cushion foundations and essence mists, are now staples worldwide, proving that Korean innovation continues to shape consumer preferences.

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

Other top search trends include snail serums, a K-beauty standard-bearer typified by mucin content. Top brands associated with these searches include K-beauty leading lights, such as CosRX and Sulwhasoo, as well as Peach & Lily, which played a major role in K-beauty's popularity in the U.S. over the last decade.

As these trends show, skin care brands in any region can benefit by leveraging the ingredients, claims, formats and pricing that make K-beauty so alluring to U.S. shoppers.

The Rise of Customizable Skin Care

Gone are the days of one-size-fits-all. Customizable skin care is on the rise, with brands like MixNature and Function of Beauty allowing customers to choose active ingredients based on their individual concerns.

A survey by Accenture[e] found 91% of consumers are more likely to shop with brands that recognize and cater to their unique needs. This growing demand for tailored solutions is pushing companies to use AI integrations and expert consultations for personalized formulations.

Skinimalism: Fewer, Better

A recent report from NielsenIQ[f] reveals a growing trend in the beauty sector, skinimalism, a move toward simplifying skin care routines and opting for fewer, higher quality

[c]https://welcome.landinginternational.com/second-wave-of-k-beauty-report

[d]https://www.spate.nyc/2025-predicted-beauty-trends

[e]https://newsroom.accenture.com/news/2018/widening-gap-between-consumer-expectations-and-reality-in-personalization-signals-warning-for-brands-accenture-interactive-research-finds

[f]https://shop.nielseniq.com/?download_file=316252&order=wc_order_prAU1cYVVt6DX&uid=f0dd84fda97b6588eea543de70ec3da4ab7741323acd67360b7da9b0f6d7298e&key=1329aaa2-ddc6-488e-91e6-41c04c11b95b

Image by Ilshat at Adobe Stock

products. This trend aligns with the emerging concept of de-consumption, valuing quality over quantity and awareness over impulse buying.

Skinimalism is about swapping exhaustive, multi-step regimens for more streamlined, efficient routines with fewer, but more effective, products. This shift resonates with consumers' desire for sustainable and mindful consumption. The trend is visible on platforms like TikTok, where users share their simplified routines and reject excessive consumption often seen in influencer hauls.

Despite these changes, the facial skin care market remains robust, registering a revenue growth of 8.2% and an increase of 2.3% in households purchasing skin care products. Consumers are not reducing their engagement with the skin care category, but refining their purchasing behavior. They're shifting away from less commonly used products towards core product types, contributing to growth in the facial skin care market.

The top four most commonly purchased product types among facial care households include:

- General/multipurpose cleansers
- Day moisturizer
- Facial cleansing wipes
- Facial treatments

Meanwhile, pandemic-induced changes in consumer behavior are impacting less commonly used products like facial skin appliances, cleansing masks and exfoliators/scrubs, leading to a decline in their sales.

According to the report, most skin care consumers, around 75%, buy three or fewer different product types and 97% buy six or fewer, a trend stable over the past three years. The report suggests brands should focus on less commonly used products and instead promote a regimen within core product types while highlighting product quality and emerging ingredients within these types.

The report concludes that while skinimalism promotes fewer products, consumers are not minimizing their category engagement, but rather focusing on core, quality products, leading to increased category spending. The trend indicates a more mindful and quality-oriented approach to skin care, potentially impacting future beauty industry strategies.



Data from the NielsenIQ report suggests that brands should focus on less commonly used products and instead, promote a regimen within core product types.

Textured Skin

According to Spate's 2025 Beauty Trends Report, "Textures are also taking center stage in beauty routines. Jelly-like products, collagen patches and milky-texture toners, are gaining traction for their sensorial appeal and proven results. These innovations highlight a growing demand for products that deliver satisfying user experiences alongside visible benefits. From peel-off lip stains to silky body lotions, texture is becoming a key driver of consumer interest."

Brands can capitalize on this growing trend by developing targeted products specifically designed for popular skin concerns. This approach should prioritize the critical elements of texture, formula and application techniques, ensuring optimal performance and consumer satisfaction.

Revolutionizing Skin Care with Hydration and Eco-Friendly Solutions

Nina Esposito, marketing director at Provital, discusses how Hydrafence contributes to new standards in skin care hydration, stating, "Hydrafence provides consistent, long-lasting moisture while supporting the skin's natural barrier. It combines scientific research with natural innovation to deliver up to 120 hours of hydration."

Hydrafence uses a hydrocolloid matrix derived from rice amylopectin to promote healthy skin. Esposito notes, "It is designed to prioritize hydration performance and innovation."

The Role of Innovative Delivery Systems in Enhancing Consumer Experience

Innovative delivery systems, such as slow-release actives, influence consumer expectations and satisfaction in the beauty industry. According to Esposito, these systems provide targeted, long-lasting benefits that enhance skin care efficacy.

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"They aim to deliver more sustained results, which leads to improved customer retention," she states.

Consumers are increasingly favoring products that offer extended effects and are often willing to invest in such solutions. Esposito highlights Hydrafence as an example of this trend, stating that its hydrocolloid matrix offers extended hydration and smoother skin texture over several days.

Factors Driving the Demand for Sustainable Skin Care

Sustainability has become a significant focus in the skin care industry, driven by consumer demand for environmentally friendly and transparent products. Esposito identifies key preferences among millennials and Gen Z, including natural ingredients, eco-friendly packaging and clear labeling.

Sustainability efforts also extend beyond reducing environmental impact. Esposito mentions biotechnology as an important tool for developing eco-friendly actives and achieving certifications such as cruelty-free and organic. At Provital, this effort is reflected in their Triplobiome Technology, which integrates biotechnology with sustainability in product development.

The Importance of Sustainable Practices for Skin Care Brands

Sustainability has shifted from being an optional practice to a critical component of business strategy for skin care brands.

"Consumers today value transparency, ethical practices and environmental responsibility," Esposito points out.

She emphasizes that sustainable practices can lead to reduced waste, cost savings and improved operational efficiency, all of which contribute to long-term brand viability.

Esposito concludes, "By adopting sustainable practices, brands can align with consumer expectations while contributing to a more sustainable beauty industry."

Evolving Skin Care Trends: Top Product Claims & Concerns

Data from the 2025 Spate beauty trend report reflects how skin care-related online searches highlight a significant shift in consumer preferences, emphasizing both skin health and product safety. Modern shoppers are moving beyond fleeting trends, instead seeking solutions that are safe, effective and nurturing for their skin. Notable search terms such as "fragrance-free," "skin barrier repair," "acne-safe," and "hypoallergenic" reflect a growing demand for products designed to protect and support overall skin well-being, particularly for individuals with sensitive or reactive skin. This marks a clear transition



Hydrafence was designed to provide 120 hours of consistent hydration, while strengthening the skin's barrier and accelerating recovery, per Provital.

Image by Beton Studio at Adobe Stock

toward skin care that prioritizes long-term health over superficial, quick fixes.

At the same time, terms like "plump" and "glowy" underline the continued consumer pursuit of radiant, hydrated skin. The desire for a dewy, healthy complexion remains a dominant trend, driving interest in skin care products that enhance hydration and visibly improve skin texture. Additionally, the increasing popularity of searches related to "pore control" highlights a focus on achieving smooth, even-toned skin with minimized pores—qualities that contribute to a refined and flawless appearance.

This evolving consumer behavior underscores the demand for skin care solutions that are both gentle and effective, delivering visible, real-world results while maintaining skin health. For brands, aligning with these preferences offers a strategic advantage. By recognizing and adapting to these emerging trends, companies can better connect with health-conscious and informed consumers.

Search Trends Reveal Top Consumer Skin Concerns

Search trends also highlight a growing interest in addressing specific skin concerns, with terms like "bumps," "pimples," "styes," and "fungal acne" gaining significant traction. This reflects an increased focus on finding effective solutions for sensitive skin and related issues. Consumers are now more informed and actively seeking products that not only target these concerns, but also provide long-term skin benefits.

A key demand in the market is for skin care products that repair the skin barrier while hydrating dry, acne-prone skin. Many are also looking for effective treatments for dry lips, a persistent concern tied to both environmental factors and skin care routines. Additionally, Spate Trend Data shows a notable rise in interest in sebum-controlling and acne-safe products, which are specifically designed to prevent breakouts without compromising the skin's health.

Another significant shift is the growing attention to aging-related concerns. As skin care evolves, mature skin solutions are becoming a priority for consumers looking to address fine lines, wrinkles and overall skin elasticity. These trends underscore the importance of products that are not only targeted and versatile, offering solutions for multiple concerns while maintaining a gentle, effective approach.

As the skin care industry continues to adapt to these evolving needs, companies that cater to this demand for multi-functional, science-backed products will thrive in 2025. ■



The Rise of Multipurpose Skin Care & Makeup:

Meeting Consumer Demand for Versatility

The Benchmarking Company dives deep into increasing consumers' demand for multitasking beauty products that save time, money, and space.



While consumers are interested in the convenience of multitasking products, data suggests that they are equally as concerned about the effectiveness and strength of multi-benefit products.

Image by maxbelchenko at Adobe Stock

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Courtesy of The Benchmarking Company

BY DENISE HERICH, THE BENCHMARKING COMPANY

Multitasking skin care and color cosmetics have become the norm. 67% percent of the 3,900 U.S. beauty-buying females surveyed in The Benchmarking Company's January 2025 beauty habits study say they regularly buy beauty products that perform more than one function or solve multiple problems. Whether it's skin care products that contain SPF, or makeup providing added anti-aging skin benefits, buyers expect strong multifunctional performers that are as effective as single-benefit products—and have proof to back up those claims.

The Basics—Beauty Usage and Routine

Facial skin care is the most common category of general beauty and wellness products used by U.S. beauty consumers (96%), followed by hair care products (95%), body skin care (89%) and color cosmetics (78%). Of those categories, facial skin care is used most often, with 49% saying they use it daily, and 46% use/apply multiple times per day. Body skin care comes in as a close second, with 59% saying they use body skin care products each day, and 28% using body skin care multiple times daily (**T-1**).

Hair care and color cosmetic/makeup usage is nearly identical in this regard. At least one color cosmetic/makeup product is used daily by 56% of respondents, but only 10% reapply throughout the day. For hair care, 57% of respondents said they use at least one hair product each day, with 10% reapplying that product throughout the day.

Applying body skin care products takes the least time in their routine, with 32% saying they get it done in less than 5 minutes. Most users of each product take between 6 minutes and 20 minutes to apply products on a typical day, with more time devoted to the precision involved in applying color cosmetics or perfecting their hair style. Most consumers (92%) are looking to simplify their beauty routines without compromising outcomes if possible **(F-1)**.

The chief concern **(T-2)** about multitaskers is doubt that each component of the multitasking benefit would be as strong as it would be as if it was an individual product (35%). As an example, whether an SPF moisturizer will have enough SPF for their needs or be as moisturizing as a standalone non-SPF moisturizer.

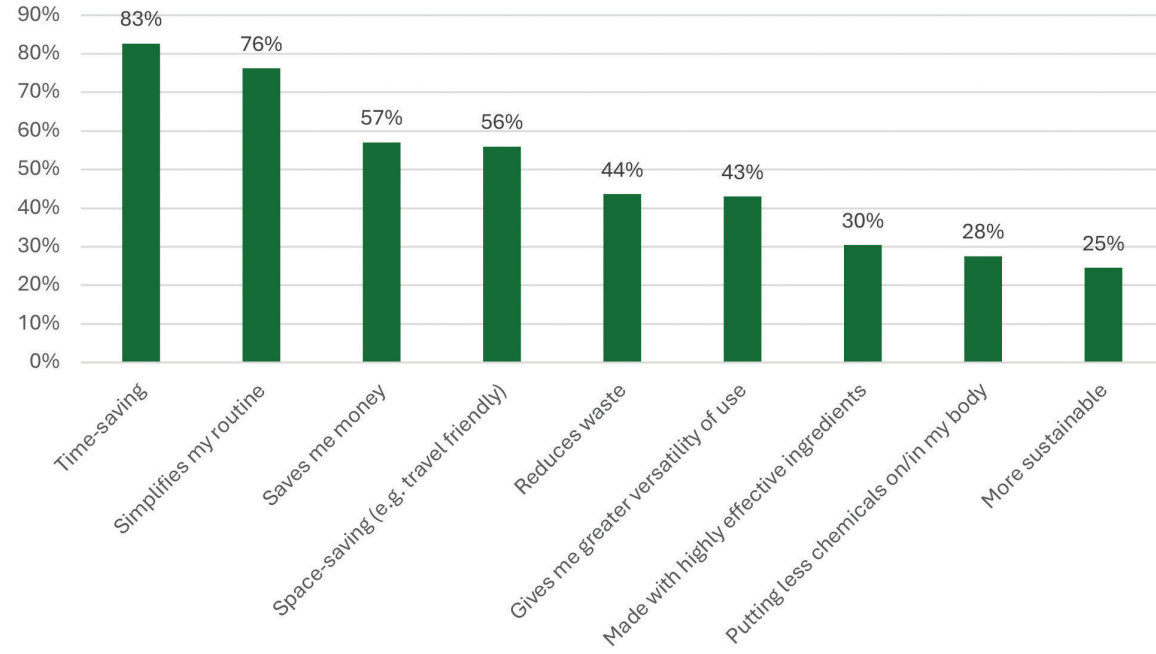
Other concerns center around the strength of each ingredient (30%), ingredient interactions (24%),

T-1. Daily time spent by consumers across categories

Daily Time Spend	Color Cosmetics	Skin Care	Body Care	Hair Care
Less than 5 minutes	11%	22%	32%	13%
6-10 minutes	31%	42%	38%	31%
11-20 minutes	28%	23%	18%	28%
21-30 minutes	16%	9%	8%	16%
31-45 minutes	8%	3%	3%	7%
46-60 minutes	4%	1%	1%	4%
Longer than an hour	2%	1%	0%	2%

Source: The Benchmarking Company, January 2025 Beauty Habits Study

F-1 Expected Benefits of Multi-Tasking Products



Source: The Benchmarking Company, January 2025 Beauty Habits Study

and whether the product could be personalized to their needs (21%), as top concerns. Twenty percent of respondents, however, have no concerns about multifunctional beauty or personal care products.

Skin Care Specifics

Female consumers are buying facial cleansers (60%), anti-aging treatments (57%), eye creams (52%), serums (52%), daily anti-aging moisturizers (45%), and cleansing/makeup remover wipes (44%) most often in the past 6 months, along with many other individual skin care products (**T-3**).

When considering what's most important when making a skin care purchase, 93% said product suitability for their skin type was the top choice, followed by the product's problem-solving ability (89%) and ingredient profile (89%), proof that the product works in readily accessible consumer claims or product reviews (78%), and affordability (70%).

T-2. Shopper concerns about multifunctional beauty products

Consumer Concerns About Multi-Tasking Products	%
A multi-tasking product diminishes the effectiveness of each component	35%
I don't know if the ingredients are at full power	30%
I don't know how the ingredients interact	24%
Multi-taskers are not personalized to my own specific needs	21%
I do not have any concerns about multi-taskers	20%
I'm not sure if a multi-tasking product would be suitable for my skin type/hair type or condition	19%
Price would be higher	16%
I like specific textures and finishes that are harder to find in a multi-tasking product	15%
I like specific brands for specific products	14%
Difficult to layer with other products in my routine	12%

Source: The Benchmarking Company, January 2025 Beauty Habits Study

What's Important When Buying Skin Care:

- 93%: Products suitable for my skin type
- 89%: Ingredients are proven to deliver specific benefits
- 89%: Product says it will solve a problem that I have
- 78%: Product reviews/consumer claims as proof that the product works
- 70%: Price
- 64%: Products formulated to be "clean"
- 57%: Customized/personalized formula for me
- 38%: Product is a multitasker

Courtesy of The Benchmarking Company

Although only 38% say multitasking skin care is important to her purchase decision, most skin care buyers (94%) say they have bought a multitasking skin care product in the past year, including facial serums promising multiple benefits (49%), lip balms with SPF and/or tint (47%), cleansers that exfoliate (46%), and tinted moisturizers with SPF (43%), among many others.

Favorite formats for multitasking skin care products include lotions (69%), serums (68%), balms (48%), masks (46%), sprays (45%), and patches (30%) (**T-4**).

Consumers who have yet to buy specific skin care multitaskers are very interested in trying them, representing a strong brand opportunity to introduce multitasking skin care concepts that appeal to their needs.

T-3. Skin care products female consumers have purchased in the past 6 months

Skin Care Products Female Consumers Have Purchased in Past 6 Months	%
Facial cleanser (not foaming)	60%
Anti-aging treatments	57%
Eye Cream	52%
Serums	52%
Anti-aging day moisturizer	45%
Cleansing/Makeup remover wipes	44%
Makeup remover (not a wipe)	42%
Anti-aging night moisturizer	42%
Toner	39%
Exfoliator	35%
Anti-aging day moisturizer with SPF	34%
Foaming facial cleanser	33%
BB/CC Creams	33%
Sheet masks	32%
Regular facial moisturizer (not specific to anti-aging)	32%
Regular night moisturizer	30%
Brightening treatments	28%
Regular Soap	28%
Acne treatments	27%
Facial masks (in a jar)	25%
Regular facial moisturizer with SPF	25%
Eye treatment	24%
Mists/Essences	24%
Cleansing wipes	23%
Pore treatments	18%
Neck/decollete cream	17%
Cleansing balm	17%
Cleansing oil	16%
Facial peels	15%
Cleanser to treat acne or other facial issue (any form)	14%
Devices (i.e. for skin rejuvenation, cleansing)	13%
Cleansing bar	13%
Facial oils (not a cleanser)	13%
Blotting cloths	7%

Source: The Benchmarking Company, January 2025 Beauty Habits Study

Let's Talk Color

In the past 6 months, U.S. female consumers have purchased mascara (80%), foundation (72%), eyeliner (62%), concealer (60%), lip gloss and blush (58% each), lipstick (57%), eye shadow palettes (56%), eye shadow (53%), and nail polish (50%) most often (**T-5**).

When considering what's most important when making a color cosmetic purchase (**F-2**), 93% said shade match was most important, followed by the product's finish and texture (88%), long-wear (83%), type of coverage (82%), the applicator/application method (67%), ingredient profile (60%), and ability to multitask (59%).

Makeup products marketed as cruelty-free continue to be important purchase cues, with 64% of shoppers saying they look for that message when buying color cosmetics. Other makeup attributes that have encouraged consumers to purchase in the past 6 months include makeup products that indicate they are waterproof (54%), clean (48%), Made in the USA (45%), non-toxic and natural (tied at 42%) (**F-3**).

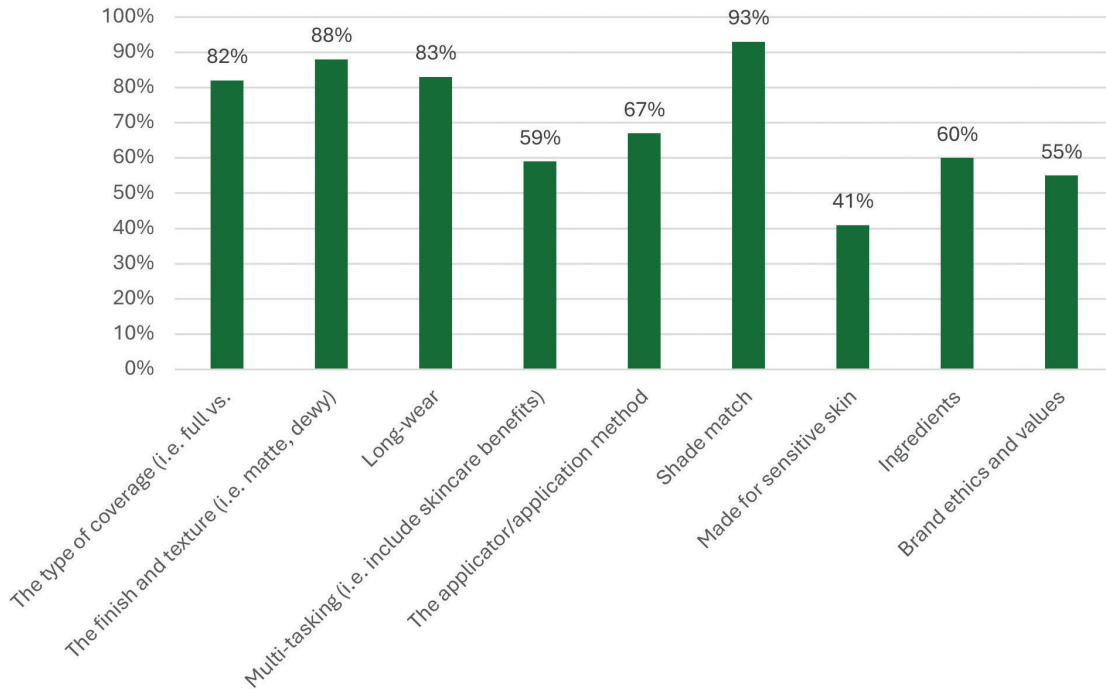
In addition, 89% percent of color cosmetics buyers say they have bought a multitasking color cosmetic product in the past 12 months.

Consumers who have yet to buy specific makeup multitaskers are interested in trying them, again representing another strong brand opportunity to introduce multitasking makeup concepts that appeal to their needs.

(Continued on Page DM15)

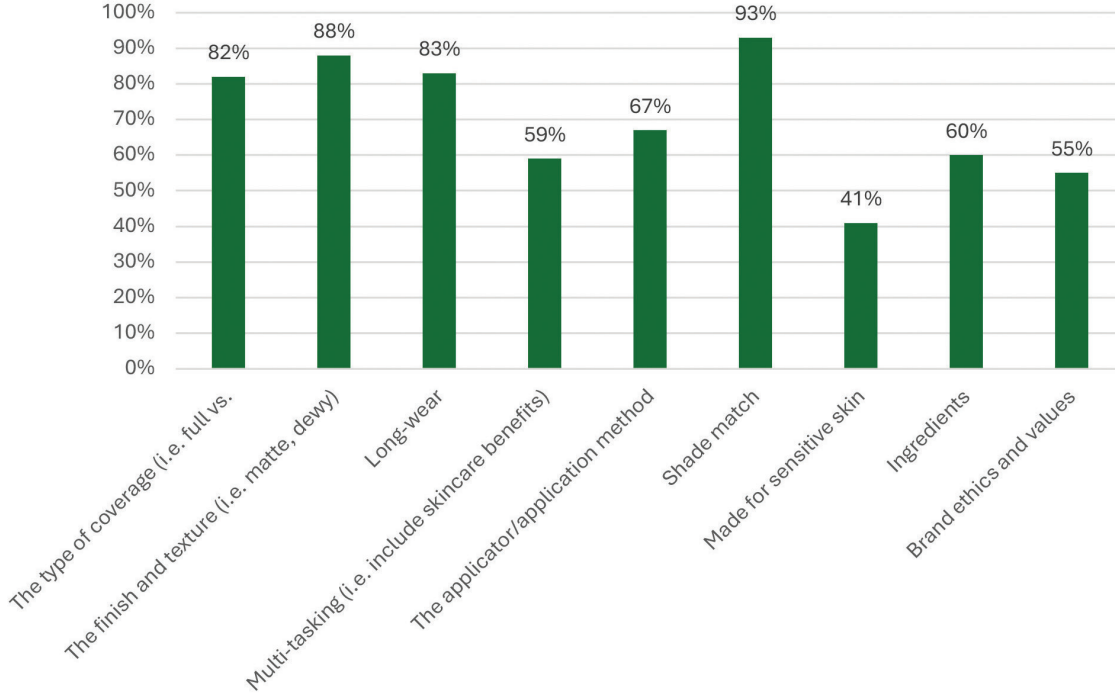
Courtesy of The Benchmarking Company

F-2 Top color cosmetic priorities among shoppers



Source: The Benchmarking Company, January 2025 Beauty Habits Study

F-3 Preferred color cosmetic attributes among shoppers



Source: The Benchmarking Company, January 2025 Beauty Habits Study

Courtesy of The Benchmarking Company

T-4. Top multitasking purchases and the products shoppers would most like to try

Multi-Tasking Skin Care Products Consumers Have Purchased in Past 12 Months	% Purchased	Brand Opportunity: If Consumers Have Not Purchased These Skin Care Multi-Taskers, They'd Like to Try	% Interested
Serum with Vitamin C and Hyaluronic Acid	49%	Night cream with retinol and hydration	62%
Lip balm with SPF and tint	47%	Overnight mask with anti-aging benefits	62%
Exfoliating cleanser	46%	Serum with Vitamin C and Hyaluronic Acid	61%
Tinted moisturizer with SPF	43%	Foundation with skin care actives	55%
Night cream with retinol and hydration	40%	Exfoliating cleanser	55%
BB/CC Creams	36%	Lip balm with SPF and tint	53%
Foundation with skin care actives	32%	Toner with hydrating and exfoliating properties	52%
Micellar water with makeup removal	31%	BB/CC creams	52%
Toner with hydrating and exfoliating properties	29%	Tinted moisturizer with SPF	51%
Cleansing balms with makeup remover	28%	Primer with skin care benefits	51%
Sheet mask with multi-benefits	25%	Cleansing balms with makeup remover	49%
Primer with skin care benefits	25%	2-in-1 scrub and mask	48%
Overnight mask with anti-aging benefits	23%	All-in-one essence	48%
Body lotion with gradual tanner and SPF	19%	Sheet mask with multi-benefits	45%
2-in-1 scrub and mask	17%	Face oil with antioxidants	45%
Face oil with antioxidants	16%	Body lotion with gradual tanner and SPF	44%
SPF with Primer	16%	SPF with primer	43%
All-in-one essence	11%	Mask cleanser hybrid	43%
Mask cleanser hybrid	6%	Micellar water with makeup removal	40%

Source: The Benchmarking Company, January 2025 Beauty Habits Study

T-5. Shoppers' color cosmetic purchases in the past 6 months

Color Cosmetics/Makeup Products Female Consumers Have Purchased in Past 6 Months	%
Mascara	80%
Foundation	72%
Eyeliner	62%
Concealer	60%
Lip gloss	58%
Blush	58%
Lipstick	57%
Eye shadow palettes	56%
Eye shadow	53%
Nail polish	50%
Eyebrow products	49%
Face powder	49%

Color Cosmetics/Makeup Products Female Consumers Have Purchased in Past 6 Months	%
Face primer	41%
Highlighter	39%
Lip tints	39%
Lip stain	36%
Bronzer	35%
BB & CC Creams	34%
Lip liner	34%
Lip plumper	31%
Contouring	28%
Gel nail polish	27%
Color correcting products	25%

Source: The Benchmarking Company, January 2025 Beauty Habits Study

Courtesy of The Benchmarking Company

T-6. Color cosmetic purchases in the previous 12 Months, alongside products shoppers would like to try

Multi-Tasking Color Cosmetic Products Consumers Have Purchased in Past 12 Months	% Purchased	Brand Opportunity: If Consumers Have Not Purchased These Color Cosmetics Multi-Taskers, They'd Like to Try	% Interested
Lip gloss with plumper	38%	Mascara with primer	68%
Lip and Cheek tint	37%	Foundation stick w/concealer	62%
Blush & highlighter duo	33%	Lipstick w/lip balm core	58%
Tinted moisturizer with SPF	32%	Eyeshadow & eyeliner crayon	56%
BB Cream with SPF	30%	BB cream with SPF	55%
Eyeliner with smudger	29%	Lip and cheek tint	55%
Eyeshadow & Eyeliner crayon	27%	Cream to powder blush and eyeshadow	54%
Eyebrow gel with tint	25%	Tinted moisturizer w/SPF	54%
Bronzer & color palette	23%	Lipstick w/SPF	53%
All-over stick (works for lips, cheeks and eyes)	22%	Blush & highlighter duo	53%
Lipstick with SPF	22%	Two-in-one lip liner and lipstick	53%
Foundation stick with concealer	21%	CC cream	52%
Mascara with primer	21%	Eyeshadow palette with face powders	51%
CC Cream	20%	All-over stick (works for lips, cheeks and eyes)	51%
Lipstick with lip balm core	19%	Eyeliner with smudger	51%
Dual-tip eyeliner	18%	Highlight and contour stick	50%
Two-in-one lip liner and lipstick	18%	Lip gloss with plumper	49%
Highlight and contour stick	17%	Dual-tip eyeliner	49%
Eyeshadow palette with face powders	17%	Brow pencil with highlighter	47%
Setting spray with glow/glitter	16%	Bronzer & color palette	47%
Cream to powder blush and eyeshadow	16%	Eyebrow gel and tint	43%
Brow pencil with highlighter	14%	Setting spray with glow/glitter	42%

Source: The Benchmarking Company, January 2025 Beauty Habits Study

(Continued from Page DM12)

The form factors that are most appealing when buying a multitasking color cosmetic product include (**T-6**):

58% Multi-use sticks
57% Dual-ended products
55% Creams
54% All-in-one palettes

Building Your Brand's Multitasking Buyer Base

Consumers clearly see value in buying skin care and makeup products with multiple benefits. Two-thirds of buyers actively seek out skin care, color cosmetics, and hair care products that can provide more than one benefit now. Consumers appreciate the time savings, potential money savings, and convenience of multitaskers.

To overcome purchase barriers when marketing multitasking beauty products, consumers need assurance that the multitasking product will be as effective as if they were purchasing single-tasking products separately. Providing the proof that consumers seek—in the form of consumer claims from independent third-party research, as well as positive product reviews from consumers like them—will give them permission to explore the many multi-benefit beauty products that have piqued their interest. ■



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

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