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Beauty's Crystal Ball: What's Brewing for 2026?



The K-Beauty World platform, from Landing International, is led by Landing CEO Sarah Chung Park, who has helped launch more than 180 K-beauty brands in the U.S. market since 2007. With a high-profile partnership with Ulta Beauty, the appetite for K-beauty will be tested in the year to come.

Beauty is in a curious moment. Skin care's prestige sector is losing the battle against mass and masstige brands that deliver elevated value, while consumers are all too happy to splurge on prestige hair care, particularly those that offer skinified benefits (treatments, scalp care, etc.). Fragrance is still growing strong, but mass and value formats such as minis are experiencing the fastest growth by far. And makeup? Aside from a few superstar categories like lip liners, growth in mass and prestige is largely elusive. At the same time, many multinational legacy brands are shuttering or being reviewed for potential divestment, while far too many legendary indies have closed their doors.

Where does that leave us as we head into a new year?

As we do every year, *Global Cosmetic Industry* is using its November issue to decode some of the trends we can expect to see in the next 12 months. Our range of experts, including ingredient, packaging, product development, marketing and manufacturing specialists, have unearthed a range of consumer, market, R&D and innovation opportunities for 2026. But, before you dive into these expert insights, I wanted to share my own predictions for the year to come.



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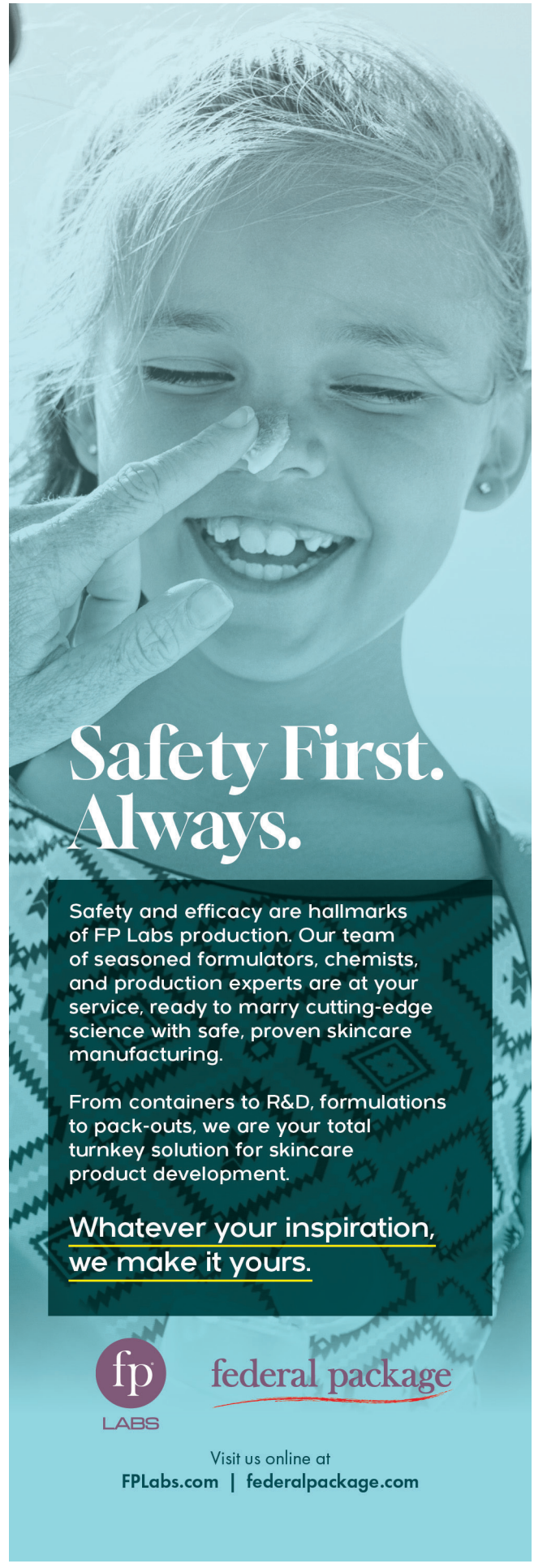
ADA POLLA
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Image courtesy of K-Beauty World

- **K-beauty reckoning:** The rapid expansion of Korean beauty brands across major Western retailers will begin to reveal just how much appetite the world's shoppers have for the country's brands.
- **Regionalized manufacturing:** Expect to see more facility openings and manufacturing M&A around the world as companies seek to minimize the impacts of tariffs and trade disputes.
- **A race toward the middle:** As consumers face growing debt and economic uncertainty, and with innovation and claims advancing across mass and masstige brands, the market is evolving. Mass brands are elevating their offerings, while prestige brands are beginning to compete at the more affordable end of the price spectrum.
- **Standout longevity:** As ingredient suppliers and brands increasingly target the mechanics and hallmarks of biological aging, the field is growing crowded. Brands will need to stand out with proven clinicals and unique ingredients to avoid being seen as just another longevity play. Expect to see more topical-ingestible matchups in the space.
- **Aging up:** With Gen Alpha moving into its teen years and the oldest Gen Z consumers nearing 30, youth-oriented brands will continue to find ways to grow with their consumers. As we saw with millennial brands, aesthetics, product formats and claims will evolve to fit the changing life stages of their core shoppers. Also expect to see beloved Gen Z brands make an argument for a broader consumer base—both for younger and more mature shoppers.

Whether or not these predictions come true, my greatest wish—as always—is that all of you have a happy, healthy, peaceful and successful new year.

We'll see you then. ■



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An increasingly informed consumer base, growing awareness of year-round SPF use, and ongoing innovation from brands and suppliers in the industry are driving category growth.

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365 Days of SPF: SUN CARE SHINES YEAR-ROUND

Growing consumer awareness opens up opportunities beyond traditional seasonal and format conventions.

Earlier this year, Circana's Larissa Jensen reported that "sun care-related products from sunscreen to self-tanners grew[a]" in the U.S. beauty market in Q1 2025, reflecting strong interest in SPF protection in even the coldest, darkest periods of the year. Across the Atlantic, Circana noted, "Prestige sun care value sales in the U.K. reached their highest levels to date in 2024… This surge comes despite a decline in sunshine hours versus the previous year." The firm concluded[b], "The growth signals a more educated consumer base, heightened awareness around year-round SPF use (prior to and within makeup application), and continued innovation from brands in the category."

The growing adoption of SPF defense presents an opportunity to premiumize. Per a recent Mintel report[c] on Canadian shoppers, "74% of consumers who use skin protection agree that it's worth spending more for sunscreen with facial skin care ingredients or benefits. This strong acknowledgement of the value of skin care highlights a key factor in the sun care market today."



Compact and portable, TaikiUSA's sunscreen dispensers are designed for on-the-go sun protection, with metered dosing options ensuring precise application every time.

This holistic approach is clearly evident at the R&D and product manufacturing level.

"Solésence is widely recognized for our innovations in zinc oxide-based UV protection," says the company's president and CEO, Kevin Cureton, "but what we're increasingly focused on, and what we believe the market is responding to, is the long-term skin health benefits that come from these products—the longevity benefits that come from comprehensive protection from UV, pollution and other environmental aggressors. This is where multi-aggressor defense becomes essential."

[a]www.circana.com/post/mass-beauty-us-sales-growth-outperforms-in-q1-as-prestige-remains-flat-circana-reports

[b]www.circana.com/post/glow-and-protect-spf-goes-year-round-as-uk-consumers-wise-up

[c]https://store.mintel.com/report/canada-suncare-and-skin-protection-market-report

Image courtesy of TaikiUSA

So, if the consumer is finally getting the message that multifunctional SPF protection year-round—and away from the beach—is the best practice, how can brands respond?

Sunscreen's Sneaky Makeover: Setting Sprays & Lip Gloss

Incorporating sun defense "prior to and within makeup application," as Circana put it, perhaps points to the motivation behind two top-growing SPF-focused product categories: setting sprays and lip gloss.

In June, Spate noted[d] that the SPF setting spray category grew "117.5% compared to last year across platforms," including TikTok and Google. The trend is being driven by the format's convenience, as well rising interest in products that combine skin care and makeup benefits.

Per Spate, U.S. consumers interested in the sector are most often searching for Supergoop!, maker of (Re)setting Refreshing Mist SPF 40, as well as e.l.f., manufacturer of the Suntouchable All Set for Sun SPF 45, and Coola, the brand behind the Makeup Setting Spray SPF 30.

That said, "most top queries remain unbranded," per Spate, meaning there is no single "owner" of the category. Other SKUs in the category include One/Size by Patrick Starrr's Mini On'Til Dawn Mattifying Sunscreen Makeup Setting Spray SPF 28, Cay Skin's Isle Nourishing Body Mist SPF 50 with Sea Moss and Hyaluronic Acid, and Australian favorite Ultra Violette's Preen Screen SPF 50 Facial Sunscreen Mist With Niacinamide. As can be seen from these examples, SPF setting sprays often feature additional skin-friendly ingredients.

Another makeup hybrid, SPF lip gloss, is gaining popularity, with interest across platforms increasing 155.9% over the last year, per Spate. e.l.f. Sun Boss Gloss SPF 25 is a leader in branded searches, though top hashtags on TikTok include Supergoop!, maker of the Glow Gloss SPF 40 Lip Balm with Peptides and Shea Butter.



In June, Spate noted that the SPF setting spray category grew "117.5% compared to last year across platforms," including TikTok and Google.

In addition to SPF defense and a pop of color, consumers searching for these products are seeking hydration, as evidenced by the prominence of hashtags like #hydratedlips. Examples of SKUs leaning into this include Caliray's Lipguard SPF 31 Hydrating Lip Gloss Balm, Ultra Violette's Sheen Screen SPF 50 Hydrating Sunscreen Lip Balm and SPF50 Glow + Go Lip Oil in Coconut.

While there are opportunities for brands to take market share in these popular categories, savvy marketers and R&D teams will surely target other color cosmetic sectors that can bring the mix of convenience and defense that consumers are seeking.

The K-Beauty Factor

The K-beauty frenzy has reached a fever pitch in the United States in 2025, but as recently as last year Spate data unearthed its growing influence on sun care.

Powered by interest in Korean beauty, top growing sun care brands on search and TikTok last year included K-beauty stars such as Innisfree and Beauty of Joseon, as well as Tocobo and Thank You Farmer.

Tapping into this interest, CTK has developed a range of sun defense concept products, including a Solar Barrier Sun Lotion SPF 50 formulation, featuring avobenzone, octisalate, homosalate and octocrylene, featuring a fast-absorbing, non-sticky gel texture appropriate for sensitive skin and inspired by Korean skin care rituals.

The company has also developed the 16.5 g Sun Shield Stick SPF 50, featuring avobenzone, octisalate, homosalate and octocrylene. The stick offers a silky, transfer-proof experience inspired by K-beauty.

The company's Second Skin Serum SPF 50 features zing oxide and a serum-like, lightweight texture housed in a 30 ml tottle.

Solving Consumers' SPF Beauty Pain Points

In addition to expanding SPF-focused product categories, beauty brands have

[d]www.spate.nyc/beauty

Image by Anna Neubauer at Adobe Stock

a significant opportunity to promote year-round SPF use by addressing the category's legacy of inconvenient formats and unappealing textures.

"Tacky or visible formulas remain categorical pain points for consumers," a recent Mintel sunscreen trend report[e] notes, adding that "emerging formats make it easier for even the most active individuals to protect their skin for long periods."

Fortunately, new ingredient and packaging supplier innovations offer tools to solve consumers' biggest complaints—without sacrificing on performance or safety.



CTK's 16.5 g Sun Shield Stick SPF 50 features avobenzone, octisalate, homosalate and octocrylene, and offers a silky, transfer-proof experience inspired by K-beauty.



CTK's Second Skin Serum SPF 50 features zinc oxide and a serum-like, lightweight texture housed in a 30 ml tottle.

Problem Solved: High-SPF Sun & Skin Care

Symrise AG's Neo Heliopan 310 (INCI: Diethylhexyl Butamido Triazone) is a crystalline organic UVB filter designed to support high-SPF formulations across various applications, including sunscreens, serums, lotions and anti-aging products. According to Symrise, Neo Heliopan 310 is soluble and compatible with a range of cosmetic ingredients, making it suitable for emulsions, water-resistant formulations and anhydrous systems.

According to the company, the ingredient reaches an absorption peak of 310 nm thanks to its three chromophore groups.

With its high absorption efficiency and strong photostability, the ingredient is approved for use at concentrations up to 10% in sun care and skin care products in the EU, Mercosur, ASEAN and China.

Julio Bombonati, global category director for sun protection at Symrise, noted, "[Neo Heliopan 310] is giving answers to regulatory requirements known from traditional UV filters, and it also provides strong UV protection and photoaging prevention. Thus, our offering fulfills the needs of customers and consumers alike."

[e]https://store.mintel.com/report/the-future-of-suncare



Symrise AG's Neo Heliopan 310 is a crystalline organic UVB filter designed to support high-SPF formulations across various applications, including sunscreens, serums, lotions and anti-aging products.

Problem Solved: Balancing Safety and Efficacy for Multifunctional Defense

"Regarding the popularity of zinc oxide, I believe this is part of a broader market desire for safe and effective skin care," says Solésence's Cureton. "Zinc oxide stands out because it is uniquely capable of providing both of those benefits—being both safe and effective—without controversy or regulatory concern."

He adds, "Consumer preference continues to favor mineral-based SPF products, with the most recent data we have seen from Mintel noting that 71% of consumers prefer

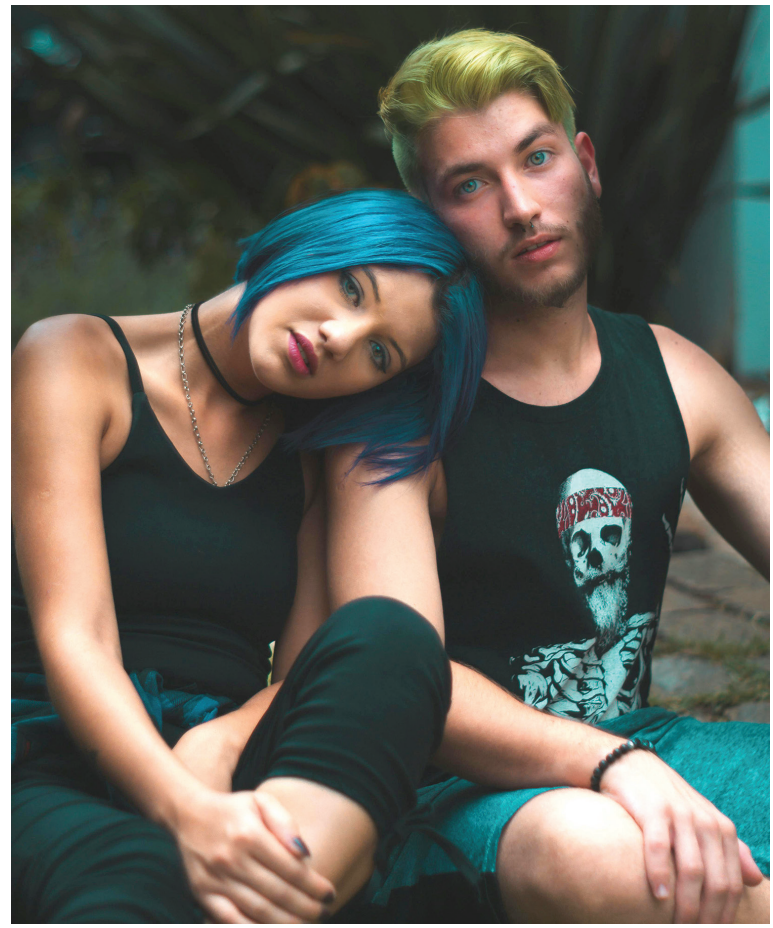
Top: Images courtesy of CTK; Bottom: image by verona_studio at Adobe Stock

mineral-based sunscreens. We knew that if we could solve for the challenging aesthetic experience that came with zinc oxide historically, we would be able to expand the base of consumers able to achieve skin health on their own terms. We are excited to see this continue even more."

Cureton concludes, "The market continues to move toward multi-aggressor protection, and zinc oxide is increasingly preferred not just because it's effective, but because it enables clean, safe and multifunctional claims—all of which align with evolving consumer and regulatory expectations."

Problem Solved: Ultra-Light Mineral Sunscreens

Inolex's LexFeel SunLight MB is a multifunctional ingredient designed to support the formulation of lighter, less whitening mineral sunscreens, in line with the concerns highlighted in recent Mintel research. LexFeel SunLight MB (INCI: Heptyl Undecylenate (and) Polyhydroxystearic Acid) is reportedly a 100% natural, low-viscosity dispersing solution that supports the creation of stable metal oxide dispersions with even particle distribution—allowing for higher use levels of metal oxides such as uncoated, non-nano zinc oxide.



Parsol SLX can deliver enhanced hair color protection and fiber UV defense, while leaving hair soft and smooth.



Inolex's LexFeel SunLight MB is a multifunctional ingredient designed to support the formulation of lighter, less whitening mineral sunscreens.

Per the company, the solution offers flexibility in formulation by supporting a wide range of emollients, oils and preservatives without negatively impacting skin feel. Key features of the ingredient include: ultra-light, fast-spreading dispersions; reduced whitening effect in mineral sunscreens; stable performance with high pigment loads; smooth, silky finish with a natural feel; and compatibility with uncoated, non-nano metal oxides.

The ingredient is said to support formulators aiming to meet clean and natural formulation goals while improving the sensory and visual profile of mineral-based sun care products.

From top: image by Luis Fernandes at Pexels; image by Krakenimages.com at Adobe Stock

Problem Solved: High Performance Without Sacrificing Sensory

DSM-Firmenich's Parsol SLX UVB filter for sun, skin and hair care can reportedly boost sunscreen performance by up to 50%—without compromising users' sensory experience on the skin, per new findings from the company. Notably, this should allow brands to lower the total chemical loads in their products while offering a"barely there" feel.

Parsol SLX is a lightweight film-forming polymeric UVB filter that allows products to avoid heaviness and harm to the microbiome. Parsol SLX's SPF boosting capabilities can reportedly support the creation of lighter, non-greasy sun protection products that offer an"invisible, uniform shield," per DSM-Firmenich.

This combination of factors makes the technology ideal for daily care routines to prevent premature aging associated with sun exposure. Parsol SLX's polymeric structure enables its film formation, broad compatibility and high efficiency, according to the company.

"Today's consumers are increasingly seeking sun protection solutions that minimize chemical load without compromising on performance," said Tina Vogt, director, global marketing, sun care. "With Parsol SLX, we're proud to offer a future-proven UVB filter that meets this demand—delivering high SPF efficacy with a lightweight, elegant skin feel. Its unique polymeric structure allows for reduced ingredient concentration while maintaining superior protection, making it a smart and sensorially pleasing choice for modern sun care formulations."

Parsol SLX can also deliver enhanced hair color protection and fiber UV defense, while leaving hair soft and smooth.

"In hair care, Parsol SLX protects hair from photodamage, prevents color fading and provides a lightweight, luxurious feel," said Melanie Waeckel, global senior marketing manager, hair care. "Instrumental tests demonstrate up to 32% color retention of red permanent hair. Leveraging the smart film-forming technology, it delivers UV performance, leaving hair soft and smooth."

Problem Solved: Improving Texture & Pigment Dispersion

Vantage Personal Care's Distinctive Sunbooster (INCI: Butyloctyl Salicylate) is a lightweight emollient that reportedly boosts SPF performance while improving texture and pigment dispersion.

Ideal for use across sun care, skin care and color formulations, it "helps to stabilize and maintain the effectiveness of UV filters such as avobenzone," per the company, while minimizing white cast and enhancing spreadability.

Problem Solved: Sensitive Skin

Chemyunion's Physavie 250 MB (INCI: Physalis Angulata Extract (and) Caprylic/Capric Triglyceride) is recommended for sensitive or reactive skin. It has soothing and anti-inflammatory properties comparable to corticosteroids, per the company, and can be incorporated into sun care products to enhance protection without affecting SPF performance.

COSMOS approved, the ingredient has been shown to support the extracellular matrix while offering protection against environmental stressors such as blue light and infrared radiation, per the company.

Problem Solved: Smooth, Mess-Free Application

Taiki USA has unveiled its latest line of sun care dispensers, offering advanced protection delivery systems designed for both powder and liquid sunscreen formulations. These dispensers incorporate integrated application tips and patented mechanisms, providing smooth, mess-free product dispensing.

In a move toward sustainability, Taiki introduces refillable options to minimize waste and reduce environmental impact. Compact and portable, these dispensers are designed for on-the-go sun protection, with metered dosing options ensuring precise application every time.

A standout feature includes the use of cruelty-free, animal-free fiber brush heads, ensuring gentle yet effective application. Taiki's dispensers are tailored to meet diverse needs, with customizable designs and solutions for various formulations.

Among the new offerings, the 1008 Powder Dispenser (15.3 ml/5.1 g capacity) and the 1040B-2 Powder Dispenser showcase Taiki's commitment to blending innovation with user convenience.

Elsewhere, as seen in the makeup sector, stick formats are also on the rise.

"Sunsticks are fast becoming a rising star in sun care packaging," says Sue Nichols, Group CEO, ICONS America. "Convenient and portable, they provide mess-free application and are perfect for on-the-go use, whether at the beach or commuting in the city. With



TaikiUSA's dispensers use of cruelty-free, animal-free fiber brush heads, ensuring gentle yet effective application.

Image courtesy of TaikiUSA

a simple swipe, sun sticks make it easy to reapply sun protection without any mess or residue left on hands."

She adds, "At ICONS America, we are seeing an increase in demand for targeted sun protection for the face, lips and body, and we have a growing range of petite, travel-sized pansticks that are particularly handy for smaller application areas like lips, nose, top of ears or under eyes."

The company's latest panstick innovations feature a variety of monomaterial PP pansticks. These come in a"chubby" shape, optimal for diverse sun care formulations and precise application.

"Our new range of short cap monomaterial pansticks are versatile options for sun care and hybrid formulations," says Nichols, adding they are"easily recyclable in curbside recycling bins and available with PCR PP material."

She adds, "We also have several refillable stick options, push up sticks, top or bottom fill, flat and slant tip cups, various fill sizes and a new in-mold matte mini stick in a cute 2 g size, perfect for packing in pockets and purses."

Nichols notes, "Another standout sun care packaging option is our tube-shaped squeezy PE tottle we call 'The Tuttle' [available in 175 ml]. It has a center-dispensing PP cap ideal for convenient, single-handed, on-the-go use for sun care lotions, creams and gels."

Problem Solved: Inclusive SPF Defense

Earlier this year, Solésence, Inc., a specialist in non-nano, mineral-based skin care, was awarded the prestigious *Cosmetics & Toiletries* (C&T) Allē Award for its Au Lait Face Milk SPF 50+, recognized as the Best Prestige Finished Formula.

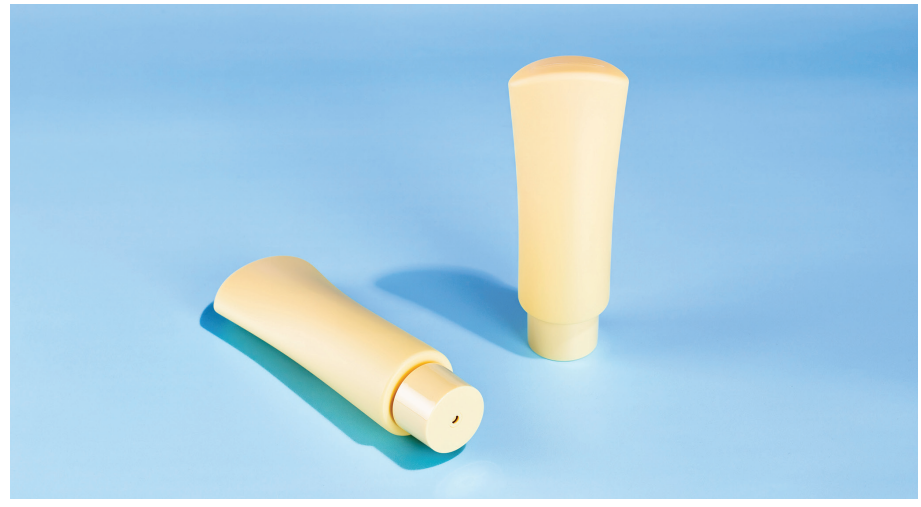
The Au Lait Face Milk SPF 50+ stood out for its inclusive, 18-shade range designed to suit all primary skin tones and undertones. Built with Solésence Kleair technology, the product offers advanced sun



ICONS America's latest panstick innovations feature a variety of monomaterial PP pansticks.



"Our new range of short cap monomaterial pansticks are versatile options for sun care and hybrid formulations," says Sue Nichols of ICONS America.



ICONS America's 175 ml tube, "The Tuttle," is a squeezable container that features a cap designed for easy, one-handed use, making it ideal for lotions, creams and gels on the go.

Images courtesy of ICONS America

protection, while providing a luxurious, nourishing, lightweight feel that encourages daily use.

A key factor in its win was the product's global compatibility, designed to meet international standards, including compliance with the latest EU regulations for microplastics.

Kevin Cureton the company's new president and CEO, notes, "Whether a brand chooses any of our three different go-to-market options—white label, white label+ and custom development—all have access to our technology innovations, and because we strive to stay ahead of the curve in terms of textures with our white label concepts, brands are also able to offer to their community a wide range of product aesthetics and experience."

He adds, "Because speed to market is often a major driver for success, we generally see white label+ as a preferred option for indie brands all the way through to multinational brands. Generally, we are seeing playful texture innovations as an increasing driver of brands' product design decisions, though these textures must still deliver regulatory compliance, along with multifunctional skin benefits and an experience that brings a smile to the end consumer's face when the product is used."

As for his mission as the newly installed head of the company, Cureton says, "We like to lean in on the FranklinCovey approach to begin with the end in mind—so 18 months to two years from now, when we look back, we will see that through exclusive collaborations with our brand partners, we will have enabled access to what we believe is a broader available market for skin health products. We will achieve this through further leveraging our 90 U.S. and global patents to deliver joy by three avenues: First, by significantly broadening the number of consumers that achieve skin health through the use of UV protection products on a daily basis. Second, by addressing a broader range of skin health issues through the prevention of environmental damage, the reduction of or even reversal of the damage done by reactive oxygen species, and the improvement of cellular turnover. And third, by bringing award-winning, best-in-class product to market that enhances skin health across face, body and scalp. We expect that this will occur not just in the U.S., but on a global basis, particularly in regions where skin cancer is highly prevalent." ■





The OTC monograph limits certain novel sunscreen formats in the U.S. market, as some high-profile brands recently discovered.

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SUNSCREEN DOPING & UNAPPROVED FORMATS: SPF'S TOP REGULATORY CHALLENGES

From undisclosed UV filters to novel formats that might impact SPF efficacy, some sun care brands are pushing the envelope.

Over the summer, sunscreen consumer safety was thrust into the spotlight on two fronts: the U.S. Food and Drug Administration (FDA) issued several warning letters to brands over unapproved foam and whipped product formats, and the *Journal of the American Academy of Dermatology (JAAD)* highlighted a study (in press[a]) uncovering "hidden" actives present in sunscreen products without proper labeling.

These developments emphasize the need for compliance and transparency in sunscreen design, while providing the FDA with valuable consumer insights that could be leveraged for broader public health benefits.

Unapproved Sunscreen Forms Cross Monograph Boundaries

FDA letters, dated Aug. 6, 2025, were sent to Supergoop! , Vacation Inc., Kalani Sunwear, K & Care Organics and TiZo's parent company, Fallene Ltd. , citing that mousse, whipped and foam sunscreens do not align with the approved dosage forms under OTC Monograph M020—making these products misbranded. Vacation Inc. drew particular scrutiny for packaging that resembled whipped cream canisters. The FDA flagged this design as potentially misleading and posing a risk of accidental ingestion.

Per the monograph, only sunscreens in oil, lotion, cream, gel, butter, paste, ointment, stick, spray and powder forms are approved. Newer foam and whipped formats would require a new drug application approval.

Sunscreen Experts React

Industry expert Kelly Dobos highlighted these warnings letters in a recent social media post, remarking, "I do think there may be legitimate concern about the dispersion of the actives and even application, especially with particulates like ZnO..."

In a separate comment, she continued, "There are a myriad of issues with sunscreen regulations and test method... In fact, I'm very curious how a foam could be dosed for the SPF or UVA test. [T]he more I think about this, more questions I have…"

Other experts added that these cases are an opportunity for the FDA to revisit the Monograph in light of modern sunscreen formats, especially considering people enjoy using them. This could drive more consistent compliance and support efforts to prevent skin cancer and photodamage.



The novelty and sensory experience of foam and other formats make them attractive to consumers, but they may come with efficacy downsides.

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[a]www.jaad.org/article/S0190-9622(25)02647-7/abstract; *Editor's note:* C&T *acknowledges that the measurement techniques used, once published, could shed new light on the reported findings.*

Researchers Uncover Undisclosed UV Filters

Then, on August 17, an analysis of 150 of the most popular sunscreens was highlighted in *JAAD* (in press), reportedly revealing the presence of hidden UV filter chemical analogs not disclosed on product labels.

While additional details of the study are not yet available (as of this writing), a review of the supplementary data revealed:

- more than 50 products containing butyloctyl salicylate,
- 19 containing diethylhexyl syringylidenemalonate (DESM),
- 12 containing ethylhexyl methoxycrylene (EHMC) and
- 4 with ethyl ferulate.

See the full report (when available) for details. Notably, butyloctyl salicylate is not on the FDA monograph as a sunscreen, and ethyl ferulate is not an FDA-approved sunscreen.

Butyloctyl salicylate is described by Hallstar as an SPF booster since it can "help prevent the breakdown of certain UV filters, provide increased solvency, and potentially improve film formation on the skin." These capabilities can enhance sun protection by an SPF of 2 but only when it is combined with other UV filters, per the company.

What's more, to be considered a sunscreen (and require labeling as such), according to Hallstar, the FDA states the ingredient "must contribute 2+ SPF units to a formulation"—and at the recommended use limit (5%), it does not reach this threshold.

Acts of Sunscreen 'Doping'?

So are these incidences of hidden sunscreens acts of "sunscreen doping?" Maybe. According to a report by the brand Pavise, which was founded by biomedical engineer Sophie Bai (who reportedly coined the term), there's a difference between SPF boosters and hidden UV filters (aka "doping").

As most formulators know, boosters are inactive and used to help improve the efficacy of actual sunscreens.



Are some sunscreens "doping"? A new report claims yes.

Doping refers to the intentional use of filters that have the same function as FDA-approved filters but are not approved or labeled as such, and often hidden away in the *inactive ingredients* section of the label.

"These hidden filters are used most often to supplement the UV protection in '100% mineral' sunscreens," the company states on its website. "[This circumvents] the need for higher percentages of actual mineral UV filters, which can make formulas feel chalky, thick and greasy."

According to Pavise, this allows formulators to create a more cosmetically elegant product that offers comprehensive protection and still supports a *100% mineral* product claim. However, Pavise adds, "besides being slightly deceitful, this is a significant safety concern."

Hidden filters have the same or similar structures and functions as FDA-registered chemical UV filters, and the latter have undergone strict toxicity, safety and efficacy testing directing their use levels moderating their disclosure in products.

Interestingly, 30 of the 150 products investigated contained one or more of the listed ingredients—and are promoted as *mineral only* sunscreens.

Owning Sunscreen Formulation Responsibilities

These developments underscore two key responsibilities when it comes to sunscreen formulating. Formulators must ensure that novel textures like foams and mousses meet regulatory requirements. In addition, they must maintain transparency around active ingredients. The presence of hidden or unlabeled UV filters illustrates the fine line between enhancing product performance and risking noncompliance or consumer safety concerns.

On the regulatory side, these headlines offer insight into how products are being designed and marketed in ways that challenge existing monograph standards. Monitoring the emergence of new product forms and undisclosed actives can guide policy updates, close regulatory gaps and potentially support public health goals.

As the sunscreen market continues to innovate, the lessons from these recent warnings and research findings emphasize that compliance and transparency are critical for protecting consumers while allowing safe, effective product innovation. ■

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"Hair is under constant attack from everything your body is exposed to — sun, pollution, diet, sleep and stress," says Fabrice Guillemard, director of marketing for beauty and care at DSM-Firmenich.

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THE HAIR REPAIR DREAM TEAM: NEXT-GEN INGREDIENTS ARE HERE

Consumers increasingly seek out products to counteract hair damage resulting from heat styling, chemical treatments, UV exposure and environmental pollutants.

Consumers are increasingly seeking innovative solutions to combat hair damage from heat, chemicals, UV and environmental stressors. This demand is driving new advancements in ingredient technology, with a focus on deep repair, strengthening and overall scalp health. Leading the charge are new offerings like DSM-Firmenich's Bond Aid with OXY 229 CB, Active Concepts' AC Curezyme and Primient Covation's microbiome-friendly Zemea propanediol, all designed to restore hair's integrity and vitality from root to tip.

Meet the New Bond Builders

Consumers increasingly seek products to counteract hair damage resulting from heat styling, chemical treatments, UV exposure and environmental pollutants. "Hair is under constant attack from everything your body is exposed to — sun, pollution, diet, sleep and stress," says Fabrice Guillemard, director of marketing for beauty and care at DSM-Firmenich.

Bond Aid with OXY 229 CB: The company's new Bond Aid with OXY 229 CB (INCI: Water (*Aqua*) (and) Glycerin (and) Caprylyl Glycol (and) 1,2-Hexanediol (and) *Saccharomyces* Lysate (and) Valine (and) Threonine (and) Glutamic Acid (and) Glycine (and) Disodium Succinate) is powered by a biotech-derived peptide complex and reportedly visibly restores hair's structural integrity and vitality.

Bond Aid with OXY 229 CB is said to support both keratin binding, actively strengthening the hair fiber from within and scalp oxygenation, enhancing scalp vitality and fostering an optimal environment for healthy hair growth.

The OXY 229 CB complex contains more than 700 peptides. Per the company, molecular modeling of a subset of 19 of these peptides revealed the ingredient's ability to bind with keratin and enable multi-dimensional structural repair.

Key performance data demonstrated:

- Up to 22% improvement in hair tensile strength after a single use at 1%,
- A 22% increase in combability, indicating enhanced smoothness,
- A 750% increase in scalp oxygen uptake in vitro, and
- A 10% boost in cell viability in vitro, supporting a healthier scalp.

Designed for seamless integration into both leave-on and rinse-off applications, Bond Aid with OXY 229 CB demonstrates high efficacy at a minimal 1% concentration, according to the manufacturer.

In line with clean beauty principles, Bond Aid with OXY 229 CB is derived from a natural and sustainable yeast extract. The ingredient is 98.17% of natural origin (ISO 16128), readily biodegradable (OECD test), halal-certified and produced without palm-oil derivatives, the company reports.

AC Curezyme: Meanwhile, Active Concepts has launched AC Curezyme (INCI: Vegetable Protein Keratinoligase), an ingredient

combining quaternization and bond-building. This hybrid bridges the gap between classic conditioning and advanced bond repair, elevating both performance and sustainability, per the manufacturer.

AC Curezyme is powered by the company's Curamina ingredient (INCI: Water (*Aqua*) (and) Glycerin (and) Transglutaminase), a biomimetic active that mimics an enzyme naturally found in skin and hair follicles to create essential peptide bonds. Paired with AC hydrolyzed vegetable protein PF, a plant-based and sustainable alternative to keratin, the ingredient is said to leverage an optimized enzyme-to-protein ratio.

As the company explains, through Curamina's unique mechanism of forming covalent peptide bonds, and AC hydrolyzed vegetable protein PF's hydrolyzed corn, wheat and soy protein anchoring, AC Curezyme mimics the natural cross-linking of healthy, undamaged hair. This targeted, science-backed approach rebuilds and fortifies hair structure, enhancing tensile strength, elasticity and resilience.

Together, these components seal and strengthen the hair fiber as well as deliver a weightless, deeply nourishing and environmentally mindful solution — aligning with the needs of consumers entering the post-quat era, the company reports.

In addition, unlike conventional quaternary ammonium compounds (quats) that coat the hair's surface, AC Curezyme is designed to work on a molecular level, penetrating the hair fiber to deliver bioactive repair, providing lasting hydration and frizz control.

AC Curezyme offers benefits such as bioactive repair that rebuilds the hair's internal protein matrix for genuine strength and resilience, reportedly surpassing typical conditioning. Its smart protein technology ensures weightless strength by using low molecular weight hydrolyzed proteins that absorb deeply, improving elasticity for all hair types without buildup. Moreover, it stands out as a sustainable, plant-based innovation, aligning with the demand for clean and effective beauty solutions over synthetic polymers.



AC Curezyme is powered by the company's Curamina ingredient, a biomimetic active designed to mimic an enzyme naturally found in skin and hair follicles to create essential peptide bonds.

Microbiome Friendly Scalp and Vaginal Care

Beyond rebuilding hair, Primient Covation seeks to maintain microbiome integrity in both hair and feminine hygiene products. The company, headquartered in Loudon, Tennessee, announced its Zemea propanediol received MyMicrobiome certifications for standards 19.20 (for the scalp) and 21.10 (for the vagina).

The ingredient achieved scores of 1.1 and 1.2 on the MyMicrobiome Standard scale, indicating minimal to no impact on microbial health. This milestone follows the ingredient's previous certifications for sebaceous (standard 18.10) and dry skin, reinforcing Zemea propanediol's compatibility and performance across various skin types.

"Microbiome health is increasingly important for consumers and manufacturers," said Sean L. Gahan, global technical service manager at Primient Covation. "Our certifications give formulators confidence in using Zemea propanediol in hair care and female hygiene products without compromising microbiome integrity."

The 100% bio-based 1,3-propanediol is derived from regeneratively grown dent corn in the U.S. Midwest and offers a sustainable alternative to petroleum-based products while supporting microbiome balance in sensitive areas.

Zemea propanediol is used in beauty and personal care formulations. It functions as a humectant to hydrate skin, creating an ideal environment for beneficial microbes, and as a co-solvent in preservative systems, reducing the need for harsher preservatives. ■

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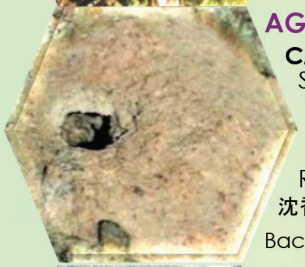
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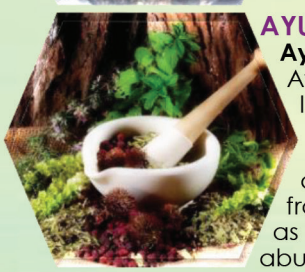
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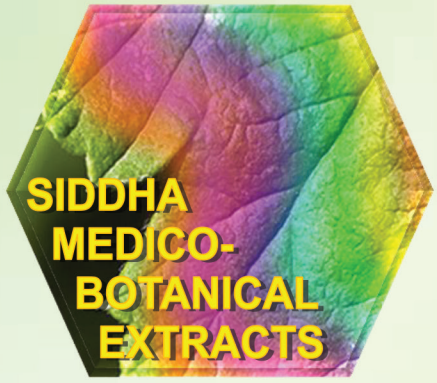
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Lonicera Japonica (Honeysuckle) Flower Extract
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Dark Black 黑

LIPO & OIL SOLUBLE LIQUIDS 脂/油溶性液体

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BEAUTY'S NEW CLASS OF ANTI-AGING INGREDIENT TECH

As the industry prepares for a new year of innovation, we looked at the latest batch of novel materials poised to shape product development in 2026 and beyond.

From salmon-free PDRN to a clean, green SPF booster, emerging ingredients are offering high performance and ethical credentials. As the industry prepares for a new year of innovation, we looked at the latest batch of novel materials poised to shape product development in 2026 and beyond.

The Future of Collagen is Blooming: VC-H1

Ingredient supplier Freemen Nutra Group has partnered with Rawga Inc., an ingredient development company from South Korea focused on sustainability, to launch VC-H1, a novel plant-based collagen peptide, to the North American market.

VC-H1 (INCI: Not Provided) is sourced from organically grown hibiscus and is composed of bioactive peptides from a collagen-like protein, along with free-radical scavenging hibiscus polyphenols.

VC-H1 reportedly stimulates collagen production more effectively than traditional animal-sourced collagen peptides and provides multiple validated skin health benefits at a 1.5 g dose.

The randomized, double-blind, placebo-controlled clinical study demonstrated that VC-H1 provided significant benefits including:

- Deep, lasting hydration,
- Improved bounce and firmness,
- Enhanced skin surface texture and
- Visible age-defying effects.

"The key to the efficacy of VC-H1, and any collagen, really, are the short two- to four-amino-acid-length peptides that stimulate collagen production in the body," noted Eric Withee, director of innovation at Freemen Nutra. "And VC-H1 has a very low molecular weight, meaning



VC-H1 is sourced from organically grown hibiscus and is composed of bioactive peptides from a collagen-like protein, along with free-radical scavenging hibiscus polyphenols.

Image by SHOTPRIME STUDIO at Adobe Stock



"DHK instantly calms skin and supports the skin barrier, and continually improves skin's resilience to external aggressors," says Deinde CEO Joshua Britton.

Image courtesy of Deinde

it is made almost entirely of these collagen-boosting peptides."

"We see this as a tremendous opportunity to bring to our customers, especially those with a focus on sustainability, a research-backed ingredient in a high-demand category," commented Hanks Li, president of Freemen Nutra. "VC-H1 is not only an innovative option within the collagen market, but with a 1.5 g dose, many if not most of our customers will also see a cost savings. That is truly a rare opportunity."



A recent clinical trial has positioned pterostilbene, a natural compound found in blueberries and grapes, as a promising, more effective alternative to resveratrol in the fight against signs of aging.

Uniproma's New Anti-Aging Secret: It's Not Salmon, It's Science

Uniproma scientists have introduced a new anti-aging ingredient, RJMPDRN REC (INCI: Sodium DNA), developed using a patented biological synthesis technology. The ingredient reportedly offers a new way to boost collagen generation for youthful-looking skin.

The advanced ingredient, a recombinant polydeoxyribonucleotide (aka PDRN; INCI: Sodium DNA), is engineered for 100% sequence accuracy in every batch. This precision sets it apart from traditional salmon-derived PDRN, per the company.

In vitro, lab studies confirm its effects: RJMPDRN REC showed a significant increase in collagen production, outperforming natural salmon PDRN in boosting Collagen I and equally increasing Collagen III.



Uniproma's new RJMPDRN REC (Sodium DNA) offers salmon-free anti-aging benefits with 100% sequence accuracy for boosting collagen and youthful skin.

Additional technical advantages include the following.

- ***Patented biological synthesis:*** 100% sequence accuracy with zero batch variation ensures consistent, high-purity results every time.
- ***Cell-level power:*** Potent anti-inflammation through A2A receptor activation, inhibiting TNF-α for new skin health.
- ***Green manufacturing:*** No animal sourcing and no ocean waste — new production aligning with global trends.
- ***Scalable production:*** High purity with unlimited scalability through biotechnology, ensuring stable global supply.

The Berry Good News for Ageless Skin: Pterostilbene

A recent clinical trial[a] has positioned pterostilbene, a natural compound found in blueberries and grapes, as a promising, more effective alternative to resveratrol in the fight against signs of aging.

[a]https://www.sciencedirect.com/science/article/pii/S2950306X25000160?via%3Dihub

From top: images by Sasha Brazhnik; Kat Ka at Adobe Stock

The open access study, published in the *Journal of Dermatologic Science and Cosmetic Technology*[a] (JDSCT), tested a 0.1% pterostilbene emulsion in 31 subjects over the course of 28 days, revealing significant improvements in skin elasticity, firmness and wrinkle reduction vs. the control emulsion.

The trial used a double-blind, split-face design, where participants applied the pterostilbene emulsion to one side of their face and a control emulsion to the other. After 28 days, the pterostilbene-treated side showed:

- Firmer, more elastic skin,
- Reduced wrinkles, including on the forehead and crow's feet area, and
- Smaller visible pores and a thicker epidermis, supported by increased collagen and elastic fibers.

According to the study, pterostilbene has demonstrated higher bioavailability and pharmacological potency compared with its parent compound resveratrol.

In addition, pterostilbene is reportedly stabler, making it more effective in skin care formulations. Indeed, an article in *Biochemistry and Biophysics Reports* noted resveratrol has a shorter half-life than its pterostilbene analogue.

Finally, pterostilbene also demonstrates greater ROS-scavenging capacity than resveratrol.

These advantages, per a study in the *Journal of Applied Pharmaceutical Science*, can be attributed to pterostilbene's two –OCH3 groups that make it more lipophilic, enhancing its membrane permeability, bioavailability, stability and biological potency. The health and longevity brand Jung+ adds that resveratrol contains hydroxyl groups (-OH), making it less stable and more quickly metabolized.

Pterostilbene's benefits extend beyond skin care. The JDSCT study highlighted its anti-inflammatory properties, which are being investigated for diabetes, cancer, cardiovascular diseases and neurodegenerative disorders, among others.

Its ability to stimulate collagen production could also make it a game-changer in anti-aging treatments, surpassing existing ingredients like retinol and vitamin C, *Popular Mechanics* reported.

While pterostilbene is not yet a household name, its potential is undeniable. It gained media attention earlier this year in *Sports Medicine Weekly* and *SciTechDaily*, and researchers are calling for further studies to explore its effects across different demographics and concentrations.

With its proven efficacy and superior properties, pterostilbene could soon become a staple in the next generation of skin care products.

Cool, Calm and Resilient: Meet the Skin Care Hero from Prickly Pear

Deinde's Instant-Calming Recovery Gel features biotech-derived dihydrokaempferol (DHK) as the primary active ingredient. The cooling treatment demonstrates clinically proven efficacy in providing immediate relief while improving skin barrier function, per the company.

As Deinde reports, DHK represents a breakthrough antioxidant naturally occurring in prickly pear cactus (*Opuntia* species), which demonstrates remarkable resilience in extreme environmental conditions. The biotech-derived version eliminates the sustainability challenges associated with traditional botanical extraction, while maintaining the compound's therapeutic properties.

The ingredient's mechanism of action centers on immediate skin calming and soothing effects, delivering improved complexion evenness, while enhancing skin resilience to environmental stressors over time. Clinical applications include:

- post-procedure care,
- mitigation of active ingredient irritation (particularly retinol) and
- treatment of environmental damage including sunburn, windburn and xerosis.

The gel formulation additionally incorporates a multi-component active system beyond DHK:

- ***Polysaccharides:*** Sugar-based protective molecules to form a biomimetic barrier, shielding skin from environmental pollutants and particulate matter adhesion; and
- ***Biotech squalane:*** A skin-identical lipid that mimics kin's natural sebaceous composition, to optimizing moisture retention while providing lightweight sensory properties.

This combination reportedly supports Deinde's commitment to formulations with ≥ 94% bio-based content, aligning with industry sustainability targets.

Bakuchiol Just Got a Major Glow-Up: Pure Plus

Ichimaru Pharcos has launched Bakuchiol Pure Plus, a new cosmetic



Ichimaru Pharcos has launched Bakuchiol Pure Plus, a new cosmetic ingredient that sets a higher standard for purity and stability in plant-based retinol alternatives.

Image by NadiaA at Adobe Stock

ingredient that sets a higher standard for purity and stability in plant-based retinol alternatives. With > 99% bakuchiol content, this innovative material offers retinol-like performance while being suitable for sensitive skin.

Bakuchiol Pure Plus (INCI: Bakuchiol) is manufactured from the seeds of the babchi plant (*Psoralea corylifolia* L.) using a sustainable, supercritical carbon dioxide extraction method. According to the company, this environmentally friendly process eliminates the need for harsh solvents and results in a product with superior clarity and stability compared to conventional bakuchiol extracts.

Its Natural Index (NI) of 1, according to ISO 16128, additionally confirms its natural origin and user-friendly profile.

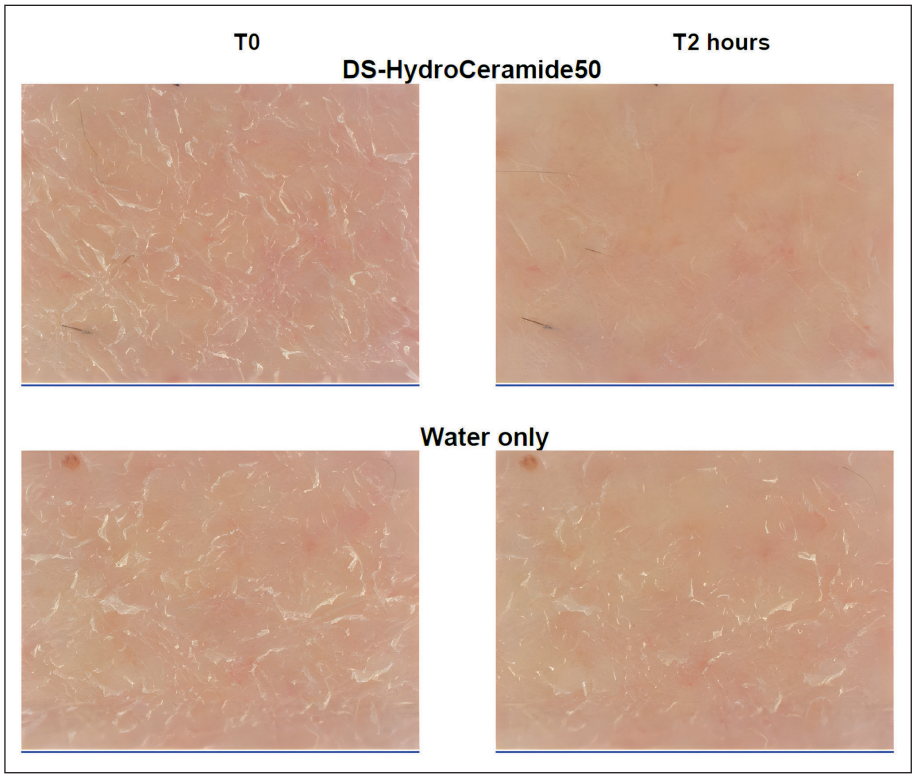
This new ingredient reportedly provides significant skin care benefits, including:

- wrinkle reduction,
- the promotion of healthy keratinization, and
- overall skin improvement.

Per the company, by minimizing trace impurities, Ichimaru Pharcos has enhanced the material's performance, delivering a reliable and effective solution for formulators seeking a natural alternative to retinol.

In line with its commitment to ethical sourcing, Ichimaru Pharcos ensures that Bakuchiol Pure Plus adheres to the principles of the Convention on Biological Diversity (CBD). An access agreement has been established between the company's Indian partner and the State Biodiversity Committee of the region of origin, ensuring the responsible and commercial utilization of biological resources.

This makes Bakuchiol Pure Plus a highly sustainable — as well as responsible — raw material for the cosmetics industry.



Croda Beauty Actives introduced DS-HydroCeramide50 and 50S bio-fermentation-derived skin-identical ceramide NP ingredients; here, the former is shown to increase skin moisture within two hours of application.

Rinse and Shine: Ceramides Make a Splash in Cleansers

Croda Beauty Actives has introduced DS-HydroCeramide50 and 50S, bio-fermentation-derived skin-identical ceramide NP ingredients from the company's SphingoCare range.

According to the company, DS-HydroCeramide50 and 50S (INCI: Ceramide NP (and) Polyglyceryl-10 Stearate (and) Sucrose Stearate (and) Hydrogenated Lecithin) represent significant advancements for rinse-off applications, addressing the challenge of incorporating ceramides into gentle cleansers and body washes while maintaining product stability.

The ingredients employ a water-dispersible solid lipid particle technology to overcome traditional ceramide formulation limitations. As Croda explains, this vectorization system enables controlled, continuous ceramide delivery into the epidermis while operating at incorporation temperatures below 50°C.

DS-HydroCeramide50 is a water-dispersible form of oleic acid moiety ceramide NP while DS-HydroCeramide50S a water dispersible form of stearic acid moiety ceramide NP. The technologies thereby simplify formulation processes compared to conventional pure ceramide applications, per the company.

In addition, the company underscores the ingredients' ability to boost skin ceramide neo-synthesis, providing a dual action and ensuring prolonged efficacy.

Clinical testing revealed DS-HydroCeramide50 increased skin moisture by +13.4% versus the placebo within two hours post-application, even at low usage concentrations, the company reports. Surface texture improvements also showed a +13% increase in aspect score compared to water cleansing alone.

Skin permeation studies demonstrated DS-HydroCeramide50 achieved +93.7% increased

Image courtesy of Croda Beauty Actives



DS-HydroCeramide50 is a water-dispersible form of oleic acid moiety ceramide NP while DS-HydroCeramide50S a water dispersible form of stearic acid moiety ceramide NP.

ceramide penetration versus control, significantly outperforming non-vectorized ceramide NP at +56.1%, the company highlights.



Swiss-based biomaterials firm Seprify has launched the cellulose-based SilvaLuma, which can reportedly double SPF values at just 3% dosage levels, per in vitro studies, which can lower UV filter loads without sacrificing protection.

From top: image by oriori at Adobe Stock; courtesy of Seprify

Finally, a 14-day study following a barrier disruption simulation showed the ingredient reduced transepidermal water loss by 27%, indicating enhanced barrier reinforcement capabilities.

In addition, electroencephalogram evaluation of the effects of DS-HydroCeramide50 formulated in light cream demonstrated a positive influence on comfort and pampering sensations in test subjects versus placebo controls, the company reports.

Croda Beauty Actives Highlights its DS-HydroCeramide50 meets 100% natural-origin content requirements per ISO16128 standards. The ingredient also reportedly maintains vegan suitability and holds RSPO, Natrue and COSMOS approvals. IECIC listing additionally ensures regulatory compliance across multiple markets.

An SPF Booster That's Redefining Clean Beauty

Swiss-based biomaterials firm Seprify has launched the cellulose-based SilvaLuma, which can reportedly double SPF values at just 3% dosage levels, per in vitro studies, which can lower UV filter loads without sacrificing protection.

The ingredient technology is derived from the company's prototype SkyWhite pigment and allows for reef-safe claims while supporting non-greasy, non-sticky, matte finishes with no white cast.

SilvaLuma disperses in both oil and water phases, functions at 1-5% use levels, and can act as a stabilizer or co-emulsifier, making it highly versatile across formats, including:

- creams
- gels
- serums
- powders
- sticks

Per the company, the ingredient technology can also act as a TiO_2 replacement in oral care.

SilvaLuma is fully biodegradable, microplastic-free and compliant with EC 1223/2009 as a non-nano material.

The ingredient is produced using Seprify's proprietary process, which reportedly achieves up to 70% lower greenhouse gas emissions compared to conventional pulp-based materials by leveraging low-energy processes, recycling all chemicals involved and sustainable sourcing from nearby pulp mills.

Seprify's process also eliminates chemical-intensive wastewater treatment and reduces energy demand by more than 50%.

"With SilvaLuma, we're proving that formulators no longer have to choose between performance and principles," said Lukas Schertel, Ph.D., CEO and co-founder of Seprify. "Building on the foundation of SkyWhite, SilvaLuma delivers targeted SPF-boosting power with refined validation and commercial focus.

"By controlling how cellulose structures interact with light, we provide mattifying solutions and meaningful SPF enhancement in a cleaner, simpler way — exactly what consumers expect from modern beauty." ■



In a September 2025 analysis, Circana's Natallia Bambiza noted that lip liners remained "among the fastest growing subsegments and top gaining contributors to both prestige and mass makeup sales, growing 28% and 36%, respectively, so far this year."

A Slowing Lip Boom Requires New Innovation:

Micro Briefing

In the first half of 2025, prestige lip product sales grew 3% year-over-year, per Circana, driven in part by lip contouring products such as lip liners. On the other end of the spectrum, lip products represented the only growth area for mass makeup during the period. However, this growth was notably slower than in recent periods.

In a September 2025 analysis, Circana's Natallia Bambiza noted that lip liners remained "among the fastest growing subsegments and top gaining contributors to both prestige and mass makeup sales, growing 28% and 36%, respectively, so far this year."

Image by Doğu Tuncer at Pexels

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Spate reported in January 2025 that Sacheu's Lip Liner Stay-N, Nyx's Suede Matte Lip Liner and Make Up For Ever's Artist Color Pencil Lip Liner were top performers in the sector.

Meanwhile, a September report from Trendalytics highlighted rising interest in sheer wearing lip products, particularly lip glosses and lipsticks. Leaders in the trend included Summer Friday's Lip Butter Balm and Dior's Addict Lip Glow, per the report. Other SKUs in the space include Refy's Lip Blush, offering sheer wear, as well as Nars' Afterglow Sensual Shine Lipstick, "a color-meets-care hybrid lipstick with dimensional shine and hydration," and Violette_FR's Bisou Balm sheer matte lipstick.

This collective data strongly suggests that product developers should concentrate on developing innovative, multifunctional lip products. These products must seamlessly blend desirable features such as hydration, dimensional shine and buildable wear. Marketers can capitalize on this momentum by emphasizing these key benefits in campaigns and leveraging popular social media platforms to showcase how these products enhance everyday and bold looks alike.

Innovation Inspo: New Lip Makeup Concepts

A New Pencil is Sharpening the Future of Sustainable Makeup

Tokiwa Cosmetics Corporation recently unveiled its EcoLux Pencil at MakeUp in New York (MUINY). This 100% paper-packaged color cosmetic pencil is designed with sustainability and functionality in mind; it's completely plastic-free, featuring a layered paper barrel that reportedly ensures strength, prevents oil bleeding and reduces environmental impact. EcoLux uses only 1/10th of the wood seen in conventional pencils, while maintaining exceptional durability.

Tokiwa's 100% natural formula is enriched with lightweight moisturizing oils and amino-acid-based emollients to deliver a silky-smooth glide and six times more moisturization than conventional lipsticks, per the company.

EcoLux's key features:

- 100% plastic-free: Fully recyclable, paper-based design.
- Minimal resource use: Just 1/10th the wood of wooden pencils.
- Customizable branding: Layered paper allows for intricate designs.
- Lightweight design: Slim and precise for effortless application.





The EcoLux Pencil is designed with sustainability and functionality in mind; it's completely plastic-free, featuring a layered paper barrel that reportedly ensures strength, prevents oil bleeding and reduces environmental impact.

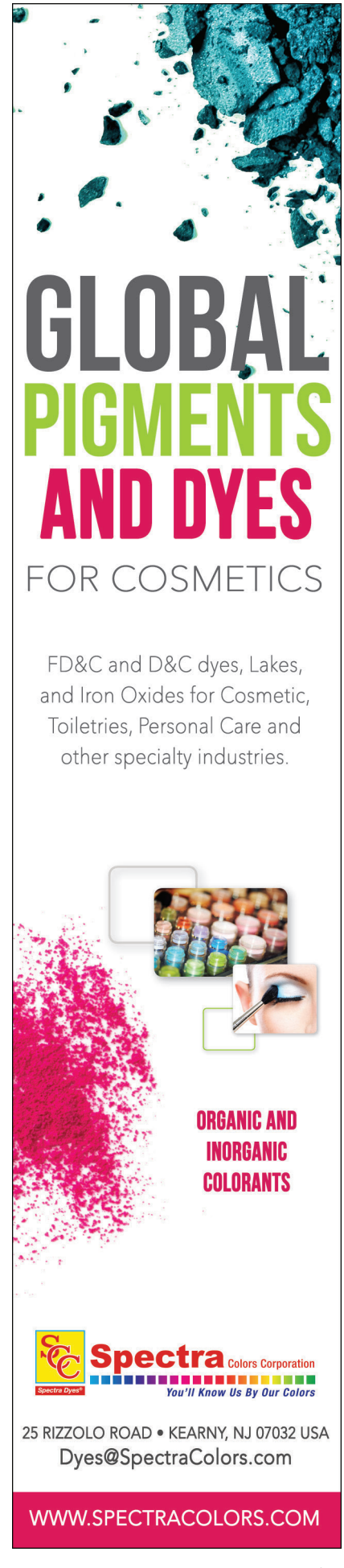
Pucker Up: The Last Call Lip Lacquer

GPI Beauty's Last Call Lip Lacquer is a bold, high-shine lip vinyl that delivers saturated color in a single swipe. Its long-wearing, comfortable formula provides a glossy, mirror-like finish without stickiness. It can be worn alone for a bold look or layered over a liner for added dimension.

Key ingredients include jojoba seed oil to soften and nourish the lips, *Mentha piperita* (peppermint) oil for a tingly, refreshed sensorial experience, vitamin E to nourish and protect the lips, and a VP/hexadecene copolymer to boost color duration and shine.

The lip lacquer's pack includes an ABS cap and outer bottle, PP stem, PETG inner bottle, LDPE wiper, and TPE applicator. ■

Images courtesy of okiwa





Cheek-plumping blushes are just one concept ushering in an era of skin-first color cosmetics.

Image by Ron Lach at Pexels

BEYOND HYBRIDS: THE NEW ERA OF SKIN-CARE-FIRST MAKEUP

A September 2025 analysis by Circana's Natallia Bambiza noted, "In the past few years, we witnessed a shift from makeup products featuring skin care benefits to products that are true hybrids, with skin care benefits and color being equally important. Lately, skin-care-first brands have expanded into makeup by launching products where skin care ingredients and benefits take priority, while color plays a supporting role."

This shift is already being seen in the market. Recently, BiotechBeauty debuted at Credo Beauty, delivering "science-backed, skin-improving makeup" that is both acne-safe and microbiome friendly.

"What excited us about BiotechBeauty is how it brings real science into everyday makeup," said Credo Beauty VP of brands Jessica Treiber at the time. "The products are fun and effortless, yet backed by research that supports the skin's microbiome and barrier. It's that rare mix of innovation, performance, and joy that we know our clients will connect with."

This opens opportunities for cross-innovation, delivering pigmented products featuring hot ingredients such as peptides—as seen with Doll 10's Peptide Bounce Balm foundation and Danessa Myricks Beauty's Yummy Skin Soothing Serum Skin



Recently, BiotechBeauty debuted at Credo Beauty, delivering "science-backed, skin-improving makeup" that is both acne-safe and microbiome friendly.

Image courtesy of BiotechBeauty



"Hybrid makeup has quickly shifted from a trend to a standard product offering, as consumers expect foundations, powders and highlighters to deliver both flawless color and measurable skin benefits," says Irena James, senior business development manager, beauty and personal care, ingredients and specialties at Univar Solutions.

Tint Foundation with Peptides + Ceramides—as well as exosomes and PDRN, for which there are currently no examples on the market.

This could be a particularly timely innovation shift, especially in light of the flat U.S. prestige facial makeup sector.

Here's what that might look like in practice.

Beauty with Benefits: The Rise of Skin-Forward Makeup

"Hybrid makeup has quickly shifted from a trend to a standard product offering, as consumers expect foundations, powders and highlighters to deliver both flawless color and measurable skin benefits," says Irena James, senior business development manager, beauty and personal care, ingredients and specialties at Univar Solutions. "Multifunctionality is no longer optional—it's the new baseline for innovation. This need for multifunctionality stems from lifestyle shifts, time-pressed routines, the wellness-driven focus on skin health, and a growing desire for fewer, smarter products that will still deliver visible results. For today's consumer, every step in the beauty care routine is expected to do more."

Provital's Sculpup, for instance, points to the possibilities of reshaping facial makeup. The blackberry-derived active ingredient is designed to naturally plump and lift cheeks by boosting collagen production, protecting the skin with antioxidants and enhancing adipocyte activity. Its pro-adipogenic and firming properties promote volume, firmness and definition without the need for invasive procedures. With its ability to improve skin texture and radiance, Sculpup is ideal for hybrid makeup products like blushes, tinted moisturizers, or foundation balms, delivering both cosmetic color and skin care benefits for a youthful, sculpted appearance.

Image by Twinkles_Photos at Pexels



Beyond actives, makeup has an opportunity to expand its reach with SPF-forward products.

A number of ingredients on the market offer benefits, says James, including DSM-Firmenich's Pepha-Tight CB, which reportedly delivers instant smoothness and tightening, giving visible results quickly—while being versatile for primers and tinted products. The company's Alpaflor Sebum, meanwhile, can help balance the skin's microbiome, reducing shine and breakouts and purportedly extending makeup wear.

Functional ingredients offer benefits as well, says James. For instance, Dow's DowSil 1686 Resin can extend shine, radiance and coverage, maintaining makeup's cosmetic impact, while its DowSil EP-9801- Hydro Cosmetic Powder offers a soft feel and masks imperfections, enhancing the sensory experience in makeup applications.

A Perfect Moment for Hybrid SPF Products

Beyond actives, makeup has an opportunity to expand its reach with SPF-forward products.

"Sun protection is essential, and consumers are increasingly looking for SPF products with formats that feel elegant, deliver hydration and integrate seamlessly into beauty routines," says James.

She adds, "This has fueled the rise of hybrid SPF products, daily moisturizers, tinted sunscreens and foundations with built-in UV protection, that combine skin benefits with beauty performance. The goal is to make SPF or sunscreen not just a necessity, but a product that people genuinely enjoy using every day."

Ingredients are driving the evolution of SPF into multifunctional hybrid beauty products that offer both protection and cosmetic benefits. For instance, DSM-Firmenich's Pentavitin provides long-lasting hydration, while DL-α-tocopherol ensures a smooth application and strengthens the skin barrier. Meanwhile, the company's Syn-Coll CB helps protect skin's structural proteins from UV damage, maintaining firmness and elasticity, making it ideal for SPF-infused makeup with anti-aging benefits.

Sustainable ingredients like Syensqo's DermalCare LIA MB and Dow's SunSpheres Bio SPF Booster enhance spreadability, sensory appeal and SPF efficiency while supporting eco-conscious formulations. In addition, Dow's DowSil EP-9801 Hydro Cosmetic Powder adds a velvety finish, while its DowSil EL-8052 Silicone Organic Elastomer Blend improves smoothness and filter compatibility. Together, these materials position hybrid SPF products as the perfect fusion of protection, skin care and beauty.

Skin-Care-Forward Inspiration: New Concept Products

Recently, GPI Beauty developed a range of concept products highlighting the movement toward more sophisticated skin-friendly makeup. Its Dance Floor Flush Cream Blush offers a lightweight, long-lasting wear with a buildable formula that melts into the skin.

Image by Vikto at Adobe Stock



Recently, GPI Beauty developed a range of concept products highlighting the movement toward more sophisticated skin-friendly makeup.

Key ingredients include sunflower seed wax for a smooth glide and locked-in color, silica for a blurred effect, vitamin E for antioxidant defense, and microcrystalline wax for supporting long-wear.

The company's Hit Replay Cream Eyeshadow is a buildable pigment with crease resistance that can pair with other shadows. Its key ingredients include nourishing jojoba esters, synthetic beeswax for adherence to skin, trimethylsilioxysilicate for long-wear performance and blurring silica.

Its Lash Out Loud Mascara is smudge-resistant, delivers easy length and lift, conditioning effects (thanks to shea butter) and layerability. Key ingredients include panthenol for protection and strengthening of lashes, lengthening myristoyl pentapeptide-17 and hydrating sodium hyaluronate.

5 Skin-First Makeup Strategies

1. **Hybrid Products are the New Standard:** Consumers now expect makeup to deliver both flawless color and measurable skin benefits. Products that combine skin care ingredients (like peptides, exosomes, PDRN) with color are no longer a trend but a baseline expectation.
2. **Skin-Care-First Approach:** The market has shifted towards"skin care-first" makeup. Prioritize skin care ingredients and benefits, with color playing a supporting role. Products that are acne-safe, microbiome-friendly, and barrier-supporting resonate strongly.
3. **Multifunctionality is Key:** Due to lifestyle shifts, time-pressed routines, and a wellness focus, consumers seek fewer, smarter products that deliver visible results. Every step in a beauty routine is expected to "do more," creating opportunities for innovative multi-functional ingredients.
4. **Embrace Functional Ingredients Beyond Actives:** Beyond traditional "active" skin care ingredients, functional ingredients (like those from Dow) can extend wear, enhance shine, provide a soft feel, or mask imperfections, significantly improving the user experience of makeup.
5. **Capitalize on SPF Integration:** There's a strong demand for SPF products in elegant, hydrating formats that integrate seamlessly into daily beauty routines. Hybrid SPF products, tinted sunscreens, and foundations with built-in UV protection offer significant market potential. ■

Image courtesy of GPI Beauty

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"Consumers are no longer just dabbling in supplements—they increasingly believe in the power of ingestibles to influence skin, scalp, and overall beauty outcomes," says Lorne Lucree, founder, Quiet Coyote. "The next step is ingredient alignment: the same actives delivered through both a topical serum/cream and an ingestible capsule/powder, sending a unified signal of support to the body."

Image by Yaroslav Shuraev at Pexels

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2026 Beauty Preview: from Neuro Skin Aging to Cautious Shoppers

Predictions are notoriously difficult, and no less so in the age of accelerating AI advancements, whiplash TikTok trends, and ever-evolving regulatory and economic conditions. But, if you look closely at the trendlines and the narratives behind emerging innovations, a wide range of trends and industry-shaping forces begins to emerge. As we head into a new year, *Global Cosmetic Industry* assembled thought leaders in the worlds of ingredients, marketing, packaging, manufacturing and more to decode where product innovation and consumer behaviors are heading in 2026. Taken together, these voices highlight an array of growth opportunities and challenges facing beauty in the year to come.

- *Flashback: 7 Beauty Predictions for 2025*

The 2026 Beauty Innovation Agenda

The Brain-Skin Connection: Neuro Skin Aging, Emotional Wellness and Multifunctional Formulations

Amandine Scandolera, head of biological evaluation, Givaudan Active Beauty

In 2026, neuro-skin aging will gain momentum as a research-driven beauty frontier. Research conducted by Givaudan Active Beauty shows that the decline in sensory neurons with age has a direct impact on the vitality and connectivity of the skin across its different layers. By bridging dermocosmetics and neuroscience, we can design next-generation 'pro-sensation' actives that preserve both skin function and sensory acuity, redefining the science of skin longevity."

Michael Lull, director of marketing, Ashland

As today's beauty and personal care consumers become increasingly informed, engaged, and intentional, their evolving expectations are reshaping the innovation landscape. We're seeing a strong shift toward wellness-driven solutions—where mental wellbeing and holistic health are central to product value.

Looking ahead, I anticipate a surge in demand for products that not only support skin health but also enhance mood and reduce stress—positioning emotional care as a functional benefit. From a formulation standpoint, multifunctional ingredients will be key. These materials empower brands to create differentiated, effective products that deliver elevated, seamless, and more gratifying user experiences across a wide range of applications.

Beyond Anti-Aging: Longevity & Prejuvenation

Chris Valencius, chief marketing officer, Evolved By Nature

In 2026, we expect a continued shift from "anti-aging" to "longevity"



Amandine Scandolera, head of biological evaluation, Givaudan Active Beauty.



Michael Lull, director of marketing, Ashland.



Chris Valencius, chief marketing officer, Evolved By Nature.

From top: images courtesy of Givaudan; Ashland; Evolved By Nature

and "prejuvenation," with consumers seeking products designed to proactively support healthy skin processes before they become compromised.

This shift is influencing a wide range of consumer behaviors, driving the"skinification" of everything, from makeup to body care, as people look for skin care benefits across all product categories. At the same time, modern lifestyles and environmental stressors are making sensitive skin the norm, prompting innovation in gentle yet effective formulas.

Within this longevity mindset, consumers are also gravitating toward biotech-driven solutions that align with both skin health and sustainability. They recognize that long-term personal wellness isn't possible if the planet is on fire.

Even the growing popularity of aesthetic procedures like fillers and microneedling, especially among younger consumers, reflects the overall longevity and prejuvenation trend. These treatments blur the lines between cosmetics and dermatology, increasing demand for science-backed, high-efficacy products that can extend or even replace in-office procedures with visible results at home.

Longevity's Frontier: Navigating Fair Product Claims in a Rapidly Evolving Market

Alec Batis, co-founder of Sweet Chemistry Labs

With more and more interest in the term "longevity" vs. "anti-aging," new technologies will continue to focus on, and expand further into some of the trendy concepts that have been popping up such as the following (with the industry trying it's best to validate several of these technologies faster than the field of regenerative medicine can): exosome therapies, growth factor development, advanced peptide engineering, microbiome diversity support, nanotechnology delivery systems, NAD cellular energy boosters, and biotech actives that replace ones found in nature.

Marketers will need to be very careful with claims veering into drug claims, but it's fairly certain they will make every attempt to get creative.

The End of 'More Is Better': Biotech, Skin Care & Precision Dosing

Joshua Britton, Ph.D., founder and CEO, Debut

Biotechnology is disrupting the "more is better" approach to active ingredient concentration that has long dominated skin care formulations. Legacy actives are being pushed to higher and higher concentrations—vitamin C at 20% and niacinamide at 10%, for example, both of which are well beyond their recommended use levels. This leads to skin irritation, inflammation and a compromised skin barrier, to name a few side effects.

By contrast, biotech-derived molecules are engineered for precision and potency, delivering measurable effects at dramatically lower concentrations, typically below 0.5%. This approach mirrors pharmaceuticals, where the precise dosage is critical: too much ibuprofen can be harmful, but a carefully determined amount provides real benefit.

The same principle applies to skin care. With biotechnology, active ingredients are optimized for efficacy at the lowest effective dose. By designing molecules with precision at the molecular level, scientists can create actives that target specific biological pathways in the skin with far greater accuracy than traditional ingredients. The result is optimal performance with minimal exposure to the harshness that often accompanies high percentages.

As regulators in the EU continue to tighten restrictions on legacy ingredients such as retinol and kojic acid, and consumers increasingly identify as having sensitive skin, the demand for high-performing, gentle and targeted solutions will only intensify. Biotechnology answers that demand, delivering smarter, safer, science-backed ingredients validated by rigorous clinical testing and data.



Alec Batis, co-founder of Sweet Chemistry Labs.



Joshua Britton, Ph.D., founder and CEO, Debut.



"In a world of immediacy where we do not have any patience for anything, products that accelerate the recovery of skin after any procedure—surgery, lasers, injections—will grow in options, formats and results," says Anna Balaguer, global trend manager, Provital.



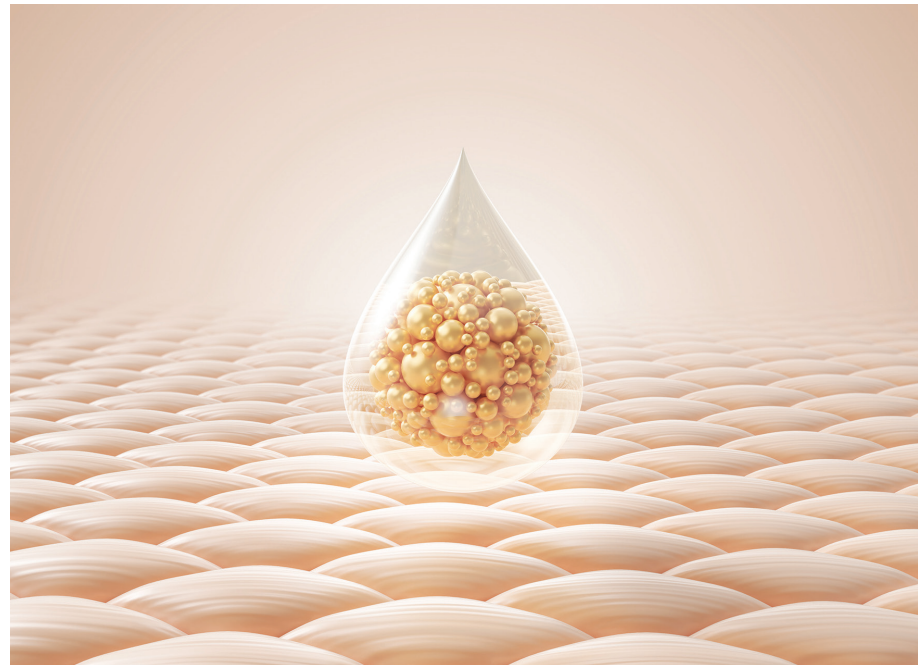
Michelle Chavez, chief commercial officer, Accupac.

From top: images courtesy of Sweet Chemistry; Debut; Provital; Accupac

The Rise of Post-Procedure Skin Recovery Products

Anna Balaguer, global trend manager, Provital

In a world of immediacy where we do not have any patience for anything, products that accelerate the recovery of skin after any procedure—surgery, lasers, injections—will grow in options, formats and results. As all these procedures have become more affordable and popular, consumers welcome these post-clinic products that work from the inside, enhancing skin recovery, reinforcing the barrier and reducing scars appearance so that all the irritation and impact is not that visible. In China, this is a huge trend, with brands creating specific packs for this fast recovery to be used one or two weeks after procedure, which cover the whole beauty routine during this specific period.



"A range of exciting new ingredients like exosomes, peptides, adaptogens, glycogen and more will provide skin care brands and manufacturers with a new world of high-tech possibilities," says Jeffrey Martin, director of marketing, FP Labs and Federal Package.

Biotech's Credibility Advantage

Michelle Chavez, chief commercial officer, Accupac

Biotech has officially graduated from curiosity to credibility, and in 2026 it takes center stage as beauty's most exciting frontier. Consumers no longer see lab-grown actives as artificial—they see them as advanced, sustainable, and in many cases superior to natural alternatives. From lab-grown collagen and keratin that replace what the body loses over time, to microbiome ferments that restore balance, to exosome-inspired systems that amplify repair, biotech is transforming what's possible in everyday formulations. The message resonates: these are not ingredients designed to mask age or fatigue, but to work with biology to reinforce resilience and extend vitality.

This shift represents a profound change in the story beauty tells. Bio-innovation reframes personal care as part of the wellness and vitality movement, tapping into cultural momentum around healthspan and preventative care. For brands, this means moving from novelty claims to biologically aligned solutions that promise real restoration and resilience. Consumers increasingly see biotech as the trusted partner that can future-proof their skin and hair, making bio-innovation not just a scientific advance, but a redefinition of what beauty means in the decade ahead.

Skin Care's New Superheroes

Jeffrey Martin, director of marketing, FP Labs and Federal Package

A range of exciting new ingredients like exosomes, peptides, adaptogens, glycogen and more will provide skin care brands and manufacturers with a new world of high-tech possibilities. Not only do these ingredients provide a fantastic range of benefits themselves, but many have the capacity to amplify the effects of other hero ingredients. By boosting the bioavailability of active ingredients, brands and formulators may be able to actually decrease the amount of hero ingredients while maintaining optimum effectiveness for consumers looking for the next big thing.

Proof Over Promise: Evidence-Based Beauty

Michelle Chavez, chief commercial officer, Accupac

In 2026, beauty isn't just about aspiration—it's about evidence. Consumers have moved beyond being impressed by glossy marketing or high price tags; they want to see and feel results for themselves. A serum that plumps skin in minutes, a cleanser that leaves an unmistakable smoothness after one wash, or a cream that measurably boosts hydration—these have become the new markers of trust. Social media has turned before-and-after transformations into the industry's most powerful form of advertising, and the rise of at-home skin diagnostics has put lab-style validation right in the consumer's hands. Proof has become the new luxury, and anything less risks being dismissed as empty promise.

This is changing the way brands formulate. It's no longer enough to focus on long-term outcomes; products must deliver instant sensorial proof—a

Image by Anusorn at Adobe Stock

cooling sensation, a visible glow, or a firming effect—while also carrying the weight of clinical data over time. Consumers expect both the "wow" they can feel in the moment and the results they can measure weeks later. For brands, the opportunity is enormous: turn proof into a differentiator, design every texture and effect as a trust signal, and communicate in the language of results, not rhetoric. In today's market, proof isn't just a feature—it's the foundation of loyalty.

Science-Driven IP is the Next Frontier

Alec Batis, co-founder of Sweet Chemistry Labs

In the past, the clean beauty movement propagated because of the public's need for increased transparency and also because of the need for new brands to somehow stand out from existing ones—basically to instill fear of existing brands so that new ones could have strong points of difference. Then to further differentiate, the concept of "science-backed" came to be where brands needed to show their expertise went further than "no" lists, creating formulas with active ingredients that had proven efficacy. That resulted in many new brands essentially donning a white lab coat in marketing photos in order to appear "science-backed."

Now, the shift has evolved towards "science-driven," which means that brands will increasingly need to own their IP. The reason for this is because with the advent of AI, savvy content creators and consumers will be able to easily find out if a company is creating "marketing complexes" of existing ingredients and calling them "proprietary" vs. having their own technology. Having owned IP may be one of the only ways to demand higher prices vs. commodity prices.

In order to have your own IP, brands will need to either have true R&D, or purchase technologies with exclusive rights from suppliers and different biotech popup companies.



"It's no longer enough to focus on long-term outcomes; products must deliver instant sensorial proof—a cooling sensation, a visible glow, or a firming effect—while also carrying the weight of clinical data over time," says Michelle Chavez, chief commercial officer, Accupac.

2026 Consumer Perspectives

Smart Shoppers, Tight Budgets: AI and Hero Products Are Shaping Spending

Christine Staples, CEO, Cohere Beauty

Economic pressures will force consumers to splurge only on hero products that deliver results while trading down or cutting everything else. Dupes will continue to thrive, forcing brands to prove their worth in pared-back routines.

With economic pressures mounting and consumer sentiment declining (-18.45% annualized drop since Jan 2024, according to the University of Michigan), shoppers will be hyper-focused on value. Armed with AI tools that compare formulations and ingredients in seconds, consumers are increasingly laser-focused on finding products that are truly efficacious and prove performance at the right price.

Image by 8pCarlos Morocho at Adobe Stock



"[T]he concept of 'science-backed' came to be where brands needed to show their expertise went further than 'no' lists, creating formulas with active ingredients that had proven efficacy," says Alec Batis, co-founder of Sweet Chemistry Labs. "That resulted in many new brands essentially donning a white lab coat in marketing photos in order to appear 'science-backed.'"

Beauty & Sustainability: Consumers Demand More

Jeffrey Martin, director of marketing, FP Labs and Federal Package

Beauty consumers are incredibly savvy when it comes to sustainability. In the coming years, the conversation will continue to evolve. Environmentally friendly initiatives will become far more nuanced as consumers dig deeper into the nature of individual ingredients, packaging, sourcing, and demand hard data and accomplishments on sustainable practices from companies, not just promises.



"Gen Alpha is no longer an emerging consumer segment," says Christine Staples, CEO, Cohere Beauty. "At ages 7-14, they're already driving nearly half of skin care sales growth, with the average Gen Alpha consumer spending $324 annually on beauty."

The 'Sephora Kids' Have Arrived: Gen Alpha is Taking Over the Beauty Industry

Christine Staples, CEO, Cohere Beauty

Gen Alpha is no longer an emerging consumer segment. At ages 7-14, they're already driving nearly half of skin care sales growth, with the average Gen Alpha consumer spending $324 annually on beauty. By 2029, their economic footprint will reach $5.5 trillion, rivaling millennials and Gen Z combined. What sets them apart is their innate algorithmic sophistication that makes them powerful brand influencers powered by trends and data. This generation doesn't just buy beauty products; they shape the conversation around them.

The Underserved 50-Plus Consumer

Christine Staples, CEO, Cohere Beauty

Women over 50 represent 40 million U.S. consumers with $15 trillion in

From top: images by WinWin; Olha Tsiplyar at Adobe Stock



Christine Staples, CEO, Cohere Beauty.



"One of the biggest shifts I see ahead is the continued emergence of inside-out systems: topical and ingestible products intentionally developed to work in tandem," says Lorne Lucree, founder, Quiet Coyote.



"Hair health, with +45.2% predicted YoY growth, is quickly moving to mainstream as concerns rise from scalp to tips," says Addison Cain, senior insights and marketing lead, Spate.

purchasing power, yet they remain largely invisible in beauty marketing. When they are represented, 28% of portrayals are negative, depicting them in isolated situations or as care recipients rather than as active, confident consumers. This is a massive miss for our industry. The reality: at 50, she's in the prime of her life and at the peak of her career. She knows exactly who she is and what she wants. According to AARP, the 50-plus population contributed $8.3 trillion in economic activity in 2018. That figure will more than triple to $26.8 trillion by 2050. This isn't just about representation; it's about capturing the world's wealthiest age cohort with products, messaging, and brand experiences that reflect their reality, not outdated stereotypes.



"Women over 50 represent 40 million U.S. consumers with $15 trillion in purchasing power, yet they remain largely invisible in beauty marketing," says Christine Staples, CEO, Cohere Beauty.

2026's Top Category Growth Opportunities

K-Beauty: Reshaping Beauty from Head to Toe

Addison Cain, senior insights and marketing lead, Spate

K-beauty, with +30.2% predicted YoY growth, has already redefined skin care globally—snail serums and pimple patches put it on the map. But it's no longer just about the 10-step routine. We're seeing its influence spread into makeup (lip stains, eye makeup), hair (innovative shampoos and treatments), and soon body care, as consumers extend face-first formulas to full-body rituals. K-beauty's next chapter is cross-category, and it's reshaping beauty from head to toe.

The Inside-Out Glow-Up: Two Are Better Than One

Lorne Lucree, founder, Quiet Coyote

One of the biggest shifts I see ahead is the continued emergence of inside-out systems: topical and ingestible products intentionally developed to work in tandem.

Consumers are no longer just dabbling in supplements—they increasingly believe in the power of ingestibles to influence skin, scalp, and overall beauty outcomes. The next step is ingredient alignment: the same

From top, L to R: images courtesy of Cohere Beauty; Lorne Lucree; Spate; image by Matilda Wormwood at Pexels

actives delivered through both a topical serum/cream and an ingestible capsule/powder, sending a unified signal of support to the body.

Each format can be powerful on its own—but the magic happens when they're designed together. A topical serum that hydrates and brightens the skin, combined with a companion supplement that nourishes from within, creates results neither could achieve alone. It also gives consumers clarity and confidence: instead of piecing together a mix of products, they can trust a paired system that feels purposeful, simple, and elevated.

In 2026, I expect to see more brands invest in this "strong alone, better together" strategy, reframing beauty not as isolated steps, but as connected pathways that unlock visible, holistic results.



"K-beauty, with +30.2% predicted YoY growth, has already redefined skin care globally—snail serums and pimple patches put it on the map," says Addison Cain, senior insights and marketing lead, Spate. "But it's no longer just about the 10-step routine."

From Scalp to Strand: Science is the Future of Hair Care

Addison Cain, senior insights and marketing lead, Spate

Hair health, with +45.2% predicted YoY growth, is quickly moving to mainstream as concerns rise from scalp to tips. It's all about holistic wellness—dandruff care, scalp treatments, and nourishing formats like collagen hair masks are gaining ground. With the focus on both internal and external health, healthy scalp care and everyday staples like scalp-care shampoos and hair serums will become non-negotiable in shower routines.



"Brands like K18, Redken, Kérastase and Olaplex dominate because users recognize their consistent efficacy across hair types and textures," says Manessa Lormejuste, beauty scientist and product developer, LORM·CO.

Manessa Lormejuste, beauty scientist and product developer, LORM·CO

I predict hair care in 2026 will follow a similar path as skin care, with brands leaning into science-backed positioning. Science and clinical performance will become the anchor for brand identity. Brands will increasingly lead with clinical studies, proprietary molecules, and performance-driven claims to stand out in a crowded market and provide clarity for users across hair types. Over the last decade, the category leaned heavily on natural and plant-based positioning, but that often compromised performance. Consumers, especially those with textured and natural hair, are now demanding products that truly deliver results.

This shift is already visible on TikTok, where the conversation centers on products that put science first rather than just clean or botanical stories. Brands like K18, Redken, Kérastase and Olaplex dominate because users recognize their consistent efficacy across hair types and textures. Performance will increasingly be measured by outcomes such as curl retention, breakage reduction, frizz control, and strengthening, validated through instrumental testing, rather than only before-and-after photos or consumer panels.

The brands that win will invest in true clinical validation and communicate results with the same rigor we expect in skin care. There is an opportunity to co-create with dermatologists, trichologists, and cosmetic chemists to reinforce the value of expert-led development. Offering consumers a salon-level experience at home, backed by science, is what will define the next generation of leaders in hair care.

Body Care's Main Character Moment

Christine Staples, CEO, Cohere Beauty

The body care category is having its skin care moment. Consumers now expect the same active ingredients, clinical efficacy, and results-driven formulations for their entire body that they've come to demand from their facial regimens. This isn't

From top: images courtesy of Anua; Manessa Lormejuste



"EuroMist's versatility supports everything from lightweight mists to oil-based formulas, enabling dupe brands to deliver a luxurious sensory experience at an accessible price point," says Erin Harmon, director of marketing, North America, Aptar.



"Body mists are also seeing renewed interest, especially among younger consumers who favor layering, lightness and affordability," says Erin Harmon, director of marketing, North America, Aptar.

just ingredient migration. It's a fundamental shift in how we define efficacious body care, creating growth opportunities across every price point as high-performance actives become democratized beyond the face.

Consumers are strategically curating high-low beauty routines, mixing luxury formulations with accessible everyday products as high-performance ingredients migrate across all price points. Shoppers will splurge on hero treatments while filling in with affordable ingredient-forward essentials, creating a democratization opportunity that drives simultaneous growth in both prestige and mass body care markets.

The Fragrance Boom's Next Chapter

Christine Staples, CEO, Cohere Beauty

While other segments plateau, fragrance is accelerating. We're seeing 12% growth in 2024, with fragrance now commanding 28% of total prestige beauty sales. The opportunity extends beyond traditional formats: body sprays are up 94%, hair fragrances up 32%. Perhaps most striking, teenage boys drove 26% of this growth, with TikTok becoming the primary purchase driver for Gen Z at 66%. This isn't a trend; it's a fundamental shift in how consumers discover, purchase, and engage with fragrance across demographics we previously underserved.

Erin Harmon, director of marketing, North America, Aptar

Fine fragrance dupes are set to be a defining trend of 2026, as consumers increasingly prioritize performance and affordability over the "concept of brand" itself. In today's market, a "dupe" is no longer seen as a compromise; it's a smart, savvy choice. Consumers view dupes as cost-effective alternatives to high-end products that deliver comparable results, reflecting a broader cultural shift across all categories of consumer goods. Fueled by the ongoing cost-of-living crisis and a growing desacralization of prestige brands, shoppers are embracing value-driven purchases with pride. Worldwide, 63% of global consumers believe that premium beauty products do not outperform their mass-market counterparts.

This shift is amplified by the rise of influencer culture, which has transformed discount shopping from shameful into a celebrated lifestyle. Social media platforms have not only made dupes acceptable but in some cases, the preferred choice, with 32% of consumers reporting that they purchased a dupe due to influencer recommendations. One standout example is Dossier, a brand that rose to fame through TikTok for its "Impressions' line, which offers affordable alternatives to designer scents. In a major move that signals the mainstreaming of dupes, Dossier opened its first physical store in New York. This transition from digital to brick-and-mortar retail reflects the growing legitimacy and demand for dupe fragrances in mainstream beauty culture.

Fragrance, once dominated by prestige, is feeling the impact most acutely. In the U.S., mass fragrance sales surged by 17%, compared to the 6% growth seen in prestige fragrance.

L to R: images courtesy of Aptar

Influencers now play a pivotal role in fragrance discovery, with nearly half of consumers (49%) saying they've purchased a scent they first encountered through an influencer. The fragrance dupe market is no longer defined by cheap imitations; it's evolving into a space of innovation and quality. Dupes now account for 20% of the global fragrance market, representing a $10 billion segment. These products offer similar scent profiles, long-lasting wear, and joyful packaging, all without the luxury pricing. As consumers continue to seek smart and affordable beauty experiences, fragrance dupes are not just a passing trend; they're a reflection of a new era in consumer values.

As fragrance dupes gain traction in 2026, packaging innovation is playing a critical role in elevating consumer experience. Aptar's EuroMist sprayers are a standout of this shift, offering high-performance, fine mist dispensing rivals' prestige packaging, without the luxury price tag. These sprayers are engineered to deliver consistent dosage, compatibility across a wide range of formulations, and customizable aesthetics, making them ideal for both mass and premium dupe brands. EuroMist's versatility supports everything from lightweight mists to oil-based formulas, enabling dupe brands to deliver a luxurious sensory experience at an accessible price point.

Body mists are also seeing renewed interest, especially among younger consumers who favor layering, lightness, and affordability. These formulations offer a casual, everyday approach to fragrance that aligns with the rise of dupes and the decline of prestige exclusivity. 65% of consumers say they purchase these for the sake of variety. Mists are increasingly positioned as fragrance staples, allowing users to switch scents based on mood, occasion, or season, without the commitment or cost of traditional perfumes.

In parallel, travel-size formats are emerging as a major force in the fragrance category, driven by consumer preferences for convenience, affordability, and personalization. Today's consumers are increasingly on-the-go and selective, seeking products that fit seamlessly into their fast-paced lifestyles.

Compact bottles offer more than just portability, they represent a low-risk, high-reward entry point for scent exploration. Consumers can experiment with new fragrances without committing to full-size prices, making minis ideal for both discovery and convenience.

Unit sales of mini and travel-size fragrances grew by 15%, nearly four times faster than other product sizes. This surge reflects a broader shift toward flexible beauty routines and impulse purchasing, especially among younger demographics and online shoppers.



"As we look toward 2026, beauty brands are increasingly investing in custom tooling and exclusive primary packaging designs to create a more distinctive on-shelf presence and deeper sensory connection with consumers," says Sue Nichols, ICONS Group CEO. Pictured are ICONS America custom in-mold pattern aluminum sticks.

Image courtesy of ICONS America

The 2026 Beauty & Personal Care Packaging Agenda

What Consumers Want from Today's Packaging

Sue Nichols, ICONS Group CEO

ICONS America's newest collection of innovation spotlights the future of beauty packaging through smart functionality, sustainable materials, and engaging, playful designs. Today's consumers are looking for more than just packaging performance, they want packaging that is experimental and goes beyond function to deliver an experience. Our latest innovations reflect this new era of beauty offering multi-functional formats, accessible design and a new level of interactivity.

Men's Grooming: Trends in Elevated Packaging

Melanie Gaudun, business development and marketing manager, Viva Healthcare Packaging (Canada) Ltd.

At Viva, we're seeing continued growth in men's grooming across hair care and body care categories, paired with rising demand for elevated packaging and decoration, including:

- Extra-large tubes and wide sticks that project a masculine, modern aesthetic.



"In men's care, packaging that blends practical performance with a touch of premium appeals to consumers seeking products that feel both functional and like a small, everyday indulgence," says Melanie Gaudun, business development and marketing manager, Viva Healthcare Packaging (Canada) Ltd.



Sue Nichols, ICONS Group CEO.

- Durable, travel-ready formats—deodorant sticks, tubes and jars—designed for active, on-the-go lifestyles.
- Premium decoration including matte and soft-touch finishes, bold metallic accents, and in-mold label graphics that reinforce a lifestyle-driven, elevated look.

In men's care, packaging that blends practical performance with a touch of premium appeals to consumers seeking products that feel both functional and like a small, everyday indulgence.

What's Ahead: Tubes, Sticks, and Tactile Designs

Sue Nichols, ICONS Group CEO

As we look toward 2026, beauty brands are increasingly investing in custom tooling and exclusive primary packaging designs to create a more distinctive on-shelf presence and deeper sensory connection with consumers. In particular, we expect to see an increase in packaging featuring tactile in-mold designs and patterns, from minimalist in-mold embossed or debossed logos in caps to more intricate, tactile in-mold patterns that span from cap to base.

We are also seeing a surge in demand for tube packaging, with innovative applicators and custom designs for formulations spanning all product categories, from color cosmetics, skin care, sun care, to hair care. The momentum behind stick packaging is also showing no signs of slowing down, especially when it comes to customs designs incorporating playful, nontraditional shapes and designed with recyclable mono-materials, combining sustainability with standout shelf appeal.



"We are ... seeing a surge in demand for tube packaging, with innovative applicators and custom designs for formulations spanning all product categories, from color cosmetics, skin care and sun care to hair care," says Sue Nichols, ICONS Group CEO. Pictured is an ICONS America tube with a pump and custom in-mold pattern aluminum sticks.

100% PCR PET: The Future of Sustainable Cosmetic Packaging?

Amy Pan, Epopack

By 2026, 100% PCR is likely to play an increasingly important role in sustainable cosmetic packaging.

Rising demand for sustainable packaging is positioning 100% PCR (post-consumer recycled) plastic as a likely preferred solution by 2026. The global PCR plastic packaging market is on a strong growth trajectory, driven by increasing environmental awareness, the need to reduce virgin plastic use, and supportive government regulations.

Advances in PCR materials are overcoming historical limitations: clarity, durability, and visual appeal are now approaching the high standards expected by premium cosmetic brands. While cost and margins remain considerations, they are becoming more manageable as supply chains mature and production efficiencies improve.

Epopack is ready to help brands, contract manufacturers, and packaging traders embrace the next generation of sustainable packaging. All PET components can be crafted in 100% PCR PET bringing eco-conscious luxury to every detail. Our mono-material jars stand apart,

From top: images courtesy of Viva Healthcare Packaging; ICONS America; ICONS America



"In 2026, we foresee one of the most significant trends in beauty packaging to be an increase in demand for domestic manufacturing, paired with global flexibility, ensuring brands' stable supply and broader options," says Sue Nichols, ICONS Group CEO.

made entirely in 100% PCR PET for a seamless, sustainable solution that outshines multi-material alternatives. With competitive pricing and effortless integration into existing product lines, we make the transition to sustainability smooth, stylish, and cost-effective.



"By 2026, 100% PCR is likely to play an increasingly important role in sustainable cosmetic packaging," says Amy Pan, Epopack.

From top: image by Kalyakan at Adobe Stock; image courtesy of Epopack

Domestic Manufacturing and Global Flexibility

Sue Nichols, ICONS Group CEO

In 2026, we foresee one of the most significant trends in beauty packaging to be an increase in demand for domestic manufacturing, paired with global flexibility, ensuring brands' stable supply and broader options. At ICONS America, we are embracing this movement at our North Carolina HQ factory where we produce our injection-molded, in-mold label tubes and caps, with domestically sourced resin and labels. We are also in the process of expanding our capabilities at our 160,000 square foot facility to include a wider range of rigid packaging including extrusion blow molding (EBM) and injection molding.

At the same time, we provide a wide range of Asian manufactured primary packaging through our Taiwan branch. We prioritize a global approach combining our domestic U.S. manufacturing with the flexibility and breadth of options from our international supply—providing a strategic balance to meet the evolving demands of our clients worldwide. ■

PACKAGING INSPO: DESIGN & FUN MEET SUSTAINABILITY

Shaping the future of packaging, blending environmental responsibility with consumer convenience.



"ICONS America showcased our newest range of packaging including our duo-end slant tip lipstick, our duo-end pencil and our slimline wand pack, each incorporating a 'pillow' tip applicator that delivers a blurring effect, merging functionality with fun," says Sue Nichols, Group CEO, ICONS America.



Aptar Beauty's Astrea Airless features piston airless dispensing that protects the formula, contained in a transparent tubular thick-walled glass bottle (15 ml, 30 ml or 50 ml).



The AQ Bottle Heavy Wall Bottle from Epopack is a sleek, sustainable packaging solution crafted entirely from PET.

L to R, clockwise: images courtesy of ICONS America; Aptar Beauty; Epopack

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Innovative packaging solutions for beauty and personal care combine sustainability, functionality and design. From Aptar's eco-friendly dispensing and spray pumps to advanced manufacturing processes at ICONS America's U.S.-based facility, these innovations are reducing environmental impact while enhancing efficiency. This month's packaging inspiration roundup explores how these advancements are shaping the future of packaging, blending environmental responsibility with consumer convenience.



ICONS America's Multini mini tottle family features PE tottles with PP caps available in three shapes and sizes.

Pillow-Tip Perfection: a Tactile Beauty Trend

At MakeUp in New York, ICONS America LLC showcased new packaging innovation, highlighting tactile, playful, multifunctional and sustainable designs.

Squishy, pillow-shaped silicone applicators are a rising beauty trend because their playful shape and fun feel turn everyday routines into a sensorial experience.

"ICONS America showcased our newest range of packaging including our duo-end slant tip lipstick, our duo-end pencil and our slimline wand pack, each incorporating a 'pillow' tip applicator that delivers a blurring effect, merging functionality with fun," says Sue Nichols, Group CEO, ICONS America. "Designed to engage consumers through touch as much as sight, the range provides consumers a multi-sensory, interactive beauty experience."



Cosmopak is helping brands stay agile with its range of made-to-order packaging solutions. Whether brands are looking for eco-forward options, lotion pumps, fine mist sprayers or tottle applicators, Cosmopak has a format to suit their needs.

Piston Airless Dispensing for Dermocosmetics

Aptar Beauty's Astrea Airless features piston airless dispensing that protects the formula, contained in a transparent tubular thick-walled glass bottle (15 ml, 30 ml or 50 ml).

The design has a stabilizing bottom, high compatibility and high-speed

From top: images courtesy of ICONS America; Cosmopak

filling capacity, making Astrea Airless ideal for dermocosmetics brands, per Aptar. Several actuator options in plastic and metal and different finishes can be applied to achieve the desired look and feel. The tubular glass type 3 is recyclable in the glass stream.

AQ Bottle: Where Green Meets Glam

The AQ Bottle Heavy Wall Bottle from Epopack is a sleek, sustainable packaging solution crafted entirely from PET. It's also available with 100% PCR content for an eco-conscious choice.

This heavy-wall bottle features an elegant flush-cap design, making it ideal for showcasing premium setting sprays and liquid foundations. The AQ Bottle proves that luxury and sustainability can seamlessly intertwine. Specs: full volume, 106 ml; diameter, 39.0 mm; height, 131.3 mm; neck finish, 24/410; size options, 30 ml, 60 ml and 100 ml.

Fun x Functionality

As consumer lifestyles continue to change, so does the demand for packaging that combines sustainability with functionality.

"At ICONS America, we meet that demand with our new Multini mini tottle family," says Nichols. "The PE tottles with PP caps are available in 3 shapes and sizes, 7.5 ml to 15 ml, each available with multiple applicator options."

The executive adds, "We also introduced our newest Mix& Match family of duo end pansticks, bottles and tubes with built-in sponge or brush. The interchangeable, removable and washable brush and sponge applicators provide hygienic, mix and match multifunctionality for a wide range of color and skin care formulations. The collection brings together versatility, reusability and convenience."

Agile Packaging for Dynamic Times

Cosmopak is helping brands stay agile with its range of made-to-order packaging solutions. Whether brands are looking for eco-forward options, lotion pumps, fine mist sprayers or tottle applicators, Cosmopak has a format to suit their needs.

Leveraging a global manufacturing network, Cosmopak provides brands with the flexibility and reliability needed to navigate market shifts, tariffs, and supply chain disruptions.

Available options include glass and aluminum bottles, pumps, droppers, and tottles, all designed to help brands stay ahead of the curve.

Sustainable Packaging for Beauty Routines

"At ICONS America, sustainability is designed into every product, including our 100% monomaterial and recyclable in-mold label tubes that provide minimal environmental impact with maximum visual appeal," says Nichols.

The company's refillable monomaterial PP jar features a built-in spatula housed in the inner cap.

"The 100 ml jar is perfectly sized for daily skin care routines and ensures hygienic application," says Nichols, "and the reusable mono PP spatula easily clicks back into place after use.

New Eco-Chic Line: Refill, Reuse, Radiate

GPI Beauty has also worked sustainability and design into its latest offerings. Its aluminum bottles feature a heavy and luxe design, refillable



ICONS America's refillable monomaterial PP jar features a built-in spatula housed in the inner cap.



GPI Beauty's aluminum bottles feature a heavy and luxe design.

L to R: images courtesy of ICONS America; GPI Beauty;



Recently, Lumson launched two new Push Down Button type products—Alu Drop and Alu Drop Touch—both with a 20/400 neck, compatible with a range of Lumson glass bottles.

capacity, and flexibility across formats including foamers, lotion pumps, sprayers and sifters.

Meanwhile, the company's refillable mascara, available in 8 ml and 12 ml variants, can also be made available with a lip applicator.

Drop It Like It's Luxe: Sleek New Cosmetic Droppers

Lumson's cosmetic droppers have been developed for precise, controlled application of various types of formulations. The collection, which ranges from Cosmetic Droppers to Push Down Button Droppers, features various collars, designs and materials. Each dropper complements Lumson's glass bottles.

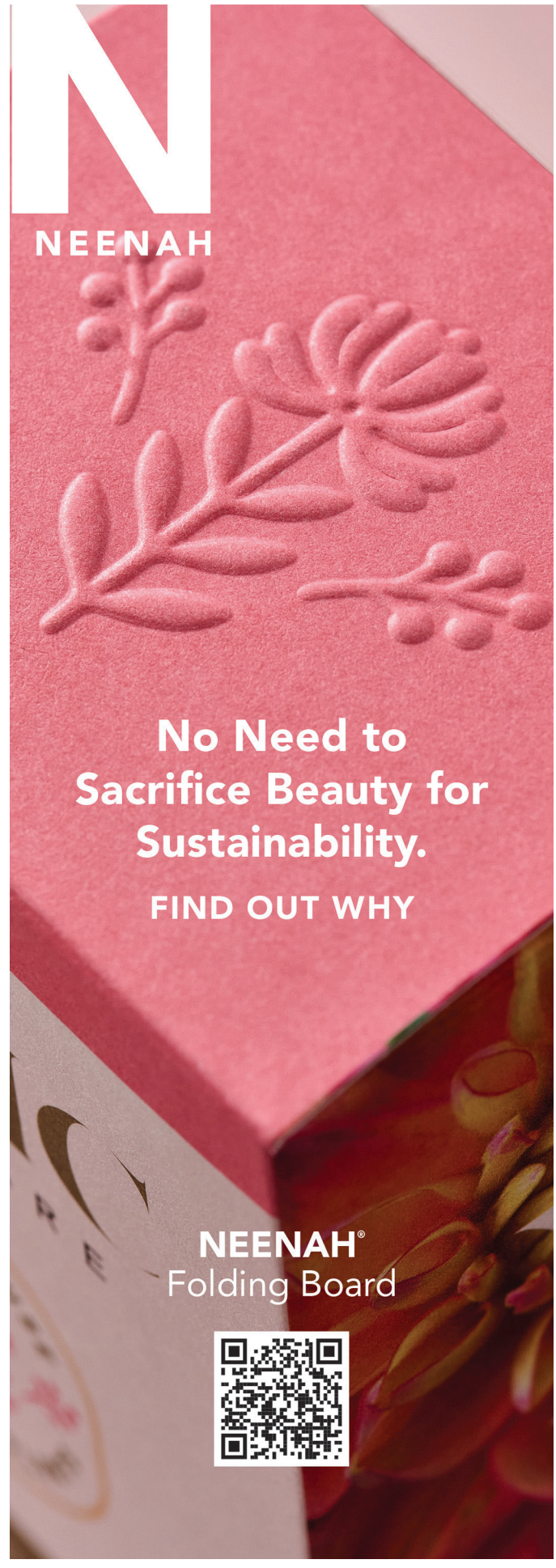
Recently, Lumson launched two new Push Down Button type products—Alu Drop and Alu Drop Touch—both with a 20/400 neck, compatible with a range of Lumson glass bottles.

Alu Drop features a clean, simple design that gives the packaging a minimalist and contemporary appearance. The Alu Drop Touch features a textured surface that offers a tactile experience.

Tactile Packaging for Global Brands

Cosmopak's "Let's Create" debut collection is a fully custom array of beauty packaging and accessories. Each item is 100% made-to-order, allowing you to tailor

Image courtesy of Lumson



the size, shape, material, decoration and function.

From airless pumps and eco-forward aluminum formats to trendy key chain minis and stylish totes, this collection is a tactile showcase for global brands.

New Recyclable All-Plastic Pumps are Here

Aptar Beauty has introduced its new Advance Collection, a line of all-plastic pumps designed with sustainability at its core. These dispensers are made entirely from polyolefin components like polypropylene (PP) and polyethylene (PE), making them fully recyclable within existing plastic waste streams.

Starting with the company's popular GSA Advance dispensing pump and PZ Advance spray pump, Aptar ensures these eco-friendly options offer the same performance and design customers expect. The omnichannel pumps are also e-commerce ready, combining convenience with environmental responsibility.

Packaging Manufacturing: Local Roots, Global Routes

"At ICONS America, we call the Charlotte, North Carolina area home for our headquarters and our ICONS manufacturing facility," says Nichols. "It's where we produce our injection-molded, in-mold label (IML) tubes and caps using a fully automated, in-line process that ensures speed, consistency, and quality. By manufacturing in the United States, we help our North American based clients reduce lead times, cut carbon emissions, and build stronger, more resilient supply chains across North America. And by sourcing our resin domestically, we've taken another big step toward lowering our environmental footprint."

She adds, "We are also in the process of expanding our made-in-USA capabilities at our 160,000 square foot North Carolina facility, with plans to include a broader range of rigid packaging products, including extrusion blow molding (EBM) and injection molding. It's all part of our commitment to being flexible and responsive to our customers' evolving needs. At the same time, we understand that global reach matters. That's why our ICONS America LLC, Taiwan branch (formerly ICONS|ICS) supports clients with end-to-end international primary packaging sourcing and design from concept to delivery."

Nichols concludes, "This integrated global network allows us to offer both regional manufacturing and international flexibility, helping clients reduce risk while increasing options. For us, it's a global approach—combining the strength of our domestic USA manufacturing with the flexibility and breadth of options of our global operations, providing a balanced, scalable foundation that strengthens the long-term resilience and sustainability of our clients' supply chains."



Cosmopak's "Let's Create" debut collection is a fully custom array of beauty packaging and accessories.

Sustainable Glam On-The-Go: Refillable Innovations

Aptar Beauty's Nomad Refill is a 10 ml travel purse spray designed to be refillable in less than 5 seconds, per the company. The design is compatible

Image courtesy o Cosmopak



Aptar Beauty's Nomad Refill is a 10 ml travel purse spray designed to be refillable in less than 5 seconds, per the company.

with all full-size perfumes with a standard screw neck and prevents overflow and overpressure.

Aptar Beauty has also launched its new Toujours Lipstick, a refillable concept designed with innovation and sustainability in mind. This new lipstick replaces the traditional twist mechanism with a patented slide gesture: users simply press a button to extend the lipstick for application and press again to retract it. An anti-push back system keeps the bullet secure during use.

The Toujours Lipstick features a reusable main casing made from lightweight aluminum, ensuring long-lasting durability. The refill casing is made from recyclable plastic (PP) and is capable of using post-consumer recycled resin. Additionally, the secondary over cap can be made from biodegradable material. ■

Image courtesy of Aptar

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	1. *Mailed outside county*	3,159	1,624
	2. *Mailed inside county*	0	0
	3. *Distribution outside the mail*	1	3
	4. *Distribution by other classes mailed through the USPS*	0	0
c.	*Total paid and/or requested distribution*	3,160	1,627
d.	*Nonrequested distribution*		
	1. *Outside county*	0	0
	2. *Inside county*	0	0
	3. *Distribution by other classes mailed through the USPS*	0	0
	4. *Distribution outside the mail*	400	300
e.	*Total nonrequested distribution*	400	300
f.	*Total distribution*	3,560	1,927
g.	*Copies not distributed*	43	45
h.	*Total*	3,603	1,972
i.	*Percent paid and/or requested circulation*	88.76%	84.43%

16. *Publication of this Statement of Ownership: Will be printed in the* November 2025 *issue of this publication.*
17. *Signature and title of editor, publisher, business manager or owner:* Samantha Attebery, *Audience Development Manager*

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