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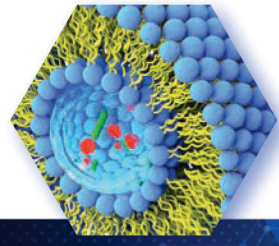
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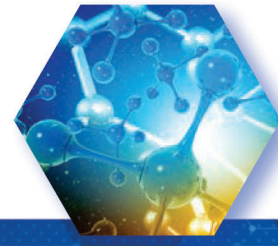
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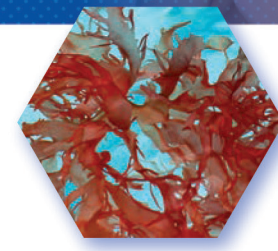
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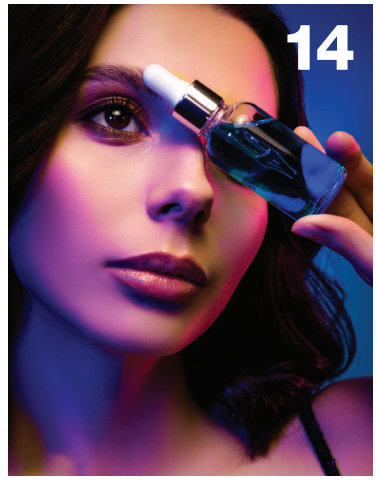
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CONTENTS

MARCH 2026 | VOLUME 194, NUMBER 2









FEATURES

8 Insider Insights: Beauty in Two Worlds: K-shaped Strategies to Capture Both Premium and Value Consumers

10 Face-Grade Body Care, Sculpting Actives and Next-Gen Ingredients: What's Driving Performance in 2026

Across body care, the trend is clear: consumers now demand face-grade efficacy, ethical sourcing and inclusivity.

14 Next-Gen Ingredients Cutting Through the Noise in Clean Skin Care

14 [preview] Powering the Next U.S. Sun Care Era

A new UV filter is making history.

22 The K-shaped Skin Care Market Playbook

22 [briefing] How to Scale a Beauty Brand in 2026: Claims, Regulations & Packaging Strategies

Is your team ready to scale your brand and tackle the challenges of today's market?

28 Bioactives, Delivery Systems and Sustainable Innovation: What's Next in Beauty

This report highlights notable new ingredients shaping the industry—from bioactives that mimic in-office aesthetic procedures to stress-fighting and neurobeauty compounds and beyond.

28 [briefing] Building Trustworthy AI for Cosmetic R&D

The real enabler is smart data: high-quality, expert-validated, structured, and deeply embedded in the realities of cosmetic formulation and global regulations.

36 As the Hair Care Market Booms, New Ingredients Drive Fresh Innovation

All signs point to a market shifting toward performance, treatment and scalp-led solutions.

ON THE COVER: Image by insta_photos at Adobe Stock

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44 From Precision to Sustainability: How Tubes, Applicators and Brushes Are Shaping the Future of Packaging for Beauty

Today's consumers expect packaging that performs, delights, and aligns with sustainability values—making tubes, applicators and brushes not just tools, but strategic differentiators in a competitive market.

IN EVERY ISSUE

4 Spark: Beauty in a K-Shaped Economy: Thriving Segments, Squeezed Middle and Strategic Opportunities for 2026

BY JEB GLEASON-ALLURED

5 Product Roundup

Precision Packaging, Claims & Problem-Solving Ingredients

48 Products & Services Showcase

48 Advertiser Index

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Beauty in a K-Shaped Economy: Thriving Segments, Squeezed Middle and Strategic Opportunities for 2026



Consumers are trading up for science-backed efficacy, personalization and immersive experiences, or trading down for clarity, reliability and value.

The beauty industry is entering 2026 in a distinctly K-shaped economy, with premium and mass segments thriving while mid-tier offerings face mounting pressure. Consumers are trading up for science-backed efficacy, personalization and immersive experiences, or trading down for clarity, reliability and value. Across tiers, transparency, multifunctionality and demonstrable performance have become non-negotiable.

In this environment, success requires brands to master the barbell strategy: hero products at the top and smart efficient solutions at the base, while avoiding the soft middle where offerings blur and relevance fades. To understand these dynamics, Global Cosmetic Industry spoke with experts across brand building, marketing, manufacturing, packaging, ingredients and R&D.

The result is our special report, "Beauty in Two Worlds: K-shaped Strategies to Capture Both Premium and Value Consumers," exploring how consumer behavior is evolving and how beauty brands can pivot to capture growth—whether by moving up, moving down or strategically meeting consumers where they now feel most comfortable spending.

The report offers actionable insights for designing compelling products, navigating polarized growth, and thriving in a market defined by value, efficacy and experience.

Happy reading; we'll see you next month.





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Precision Packaging, Claims & Problem-Solving Ingredients

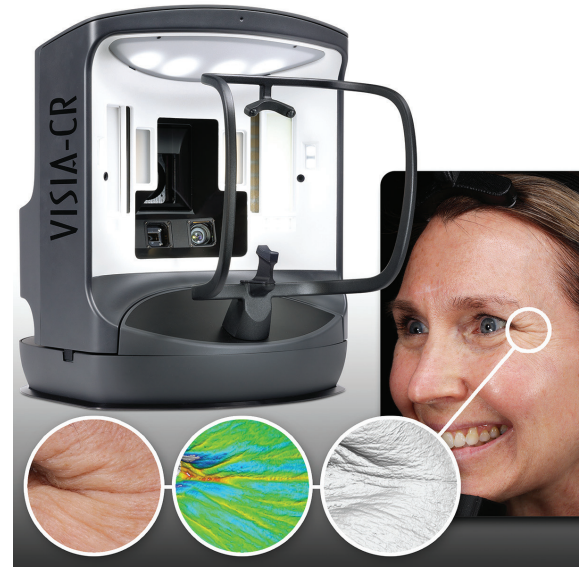


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Nuon Medical

https://www.nuonmedical.com/

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Shell Chemicals LP

https://tinyurl.com/Shell-Beauty

Shell NEODOL alcohols are classified as "readily biodegradable" per OECD guidelines and environmentally preferred. The lightly branched, essentially linear structure delivers performance comparable to oleo alcohols and can improve handling properties and compatibility. Produced via proprietary hydroformylation, Shell NEODOL grades are ideal for cleansing agents, solubilizers, stabilizers, and emollients.



Courtesy of the manufacturers

BEAUTY IN TWO WORLDS: K-SHAPED STRATEGIES TO CAPTURE BOTH PREMIUM AND VALUE CONSUMERS

Across tiers, transparency, multifunctionality, and demonstrable performance are non-negotiable.



Courtesy of Nejron Photo

Wealthier, asset-confident consumers tend to trade up, seeking science-backed efficacy, personalization, and experiential value, while less wealthy or paycheck-tight consumers trade down, prioritizing clarity, reliability, affordability, and multifunctional performance—though many shoppers move fluidly between the two, mixing premium hero items with value-focused everyday purchases. Across income tiers, both groups increasingly demand transparency, demonstrable results, and smart, efficient solutions, making performance the ultimate currency in a barbell-shaped market.

The beauty industry is entering 2026 in a distinctly K-shaped economy: premium and mass segments are thriving, while mid-tier offerings face mounting pressure. Consumers are trading up for science-backed efficacy, personalization, and experience, or trading down for clarity, reliability, and value. Across tiers, transparency, multifunctionality, and demonstrable performance are non-negotiable.

To understand the implications, we spoke with experts in brand building, marketing, manufacturing, packaging, ingredients and R&D. Their insights reveal how success now requires brands to master the barbell—hero products at the top, smart, efficient solutions at the base—while avoiding the soft middle where offerings blur. The following report explores how this dynamic is shaping skin care, hair, oral and personal care, ingredients, packaging, and manufacturing strategies for 2026.

Beauty in a K-Shaped Economy: Winning at Both Premium and Value

"As beauty and personal care move into 2026, the industry is operating within a distinctly K-shaped economy—one where premium and mass segments continue to grow in parallel, while mid-tier offerings face increasing pressure," says Michelle Chavez, chief commercial officer at Accupac. "Consumers are trading up for performance and credibility, or trading down for clarity and value, leaving less room for products that sit ambiguously in between. This divergence is reshaping how brands approach product development, portfolio architecture, pricing, and manufacturing strategy, elevating the importance of precision and flexibility across categories."

"The beauty industry naturally mirrors a K-shaped economy, with premium brands benefiting from affluent consumers trading up, while mass and value brands compete aggressively on price," says Scott Lingren, CEO, ICONS Beauty Group. "Higher-income consumers continue to spend on prestige skin care, wellness and personalization, while lower-income households prioritize affordability and durability. This divided economy rewards companies that can operate successfully across multiple price tiers."

"Affluent consumers remain willing to pay for beauty, but expectations have risen," says Moira Stein, Berlin Packaging insights and strategy. "They are becoming more discerning and intentional with their spending, so premiumization must be anchored in tangible value rather than price alone. Product development should emphasize multifunctionality (e.g., color cosmetics with skin care benefits), science-backed efficacy, medical endorsements (as demonstrated by the growing popularity of dermocosmetics), and high-quality or clean ingredients."

Stein adds, "Today's consumers—especially younger generations—want experiences not just products. A GlobalData survey found that people are 'willing to pay more for products that satisfy them on a more experiential level[a].' Demand for unique experiences, combined with the rise of social media and popularity of sharing experiences on Instagram and TikTok, is transforming the beauty industry. Digital brand engagement has become essential for beauty brands. According to McKinsey, 64% of global Gen-Z consumers say social

[a]https://www.globaldata.com/store/report/premiumization-and-indulgence-consumer-trend-analysis/



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From top: Courtesy of ICONS Beauty Group; Accupac; Berlin Packaging

media is one of their top sources of beauty inspiration[b]."

Lingren notes, "For consumers who are impacted by higher fundamental costs that create lower levels of affordability, beauty products are often regarded as functional necessities tied to self-confidence, employability, and social participation."

As a result, he says, "Affordable beauty enables individuals to present professionally without significant financial strain. Maintaining access to quality, value-priced products helps mitigate some of the social effects of economic inequality."

Across income tiers, value perception is shifting.

Stein explains, "Dupe culture is becoming normalized and widespread, with aspirational consumers seeking products that mimic their higher-priced counterparts. According to McKinsey, 63% of global consumers do not believe that premium beauty products perform better than mass products. The rise (and continued success) of "dupe culture" reflects this sentiment. Unique forms and buzz-worthy design can help increase social media awareness, which is a driving force behind dupe culture."

Barbell Beauty: Why 2026 Rewards Brands That Deliver Hero Performance and Everyday Value

"[B]eauty isn't splitting cleanly by income," says Nick Ignazzi, area sales and operations director, Provital. "It's splitting by confidence. There's an asset-confident consumer, people who feel okay because their investments, home equity, job trajectory, or simply their sense of momentum is intact. And there's a paycheck-tight consumer, people who feel every price increase immediately and must actively manage daily trade-offs. Those groups don't map perfectly to tax brackets, and plenty of people bounce between them depending on the month."

Ignazzi continues, "Beauty makes this dynamic unusually visible because it's one of the few categories where consumers can splurge and economize inside the same routine, and sometimes in the same basket. That's why Ulta is such a useful signal. In its latest reported quarter, Ulta, which serves a broad mass-to-prestige customer base, delivered comparable sales up 6.3%, driven by a higher average ticket (+3.8%) and more transactions (+2.4%). That doesn't read like a niche "only the wealthy" story. It reads like broad participation, paired with selective premiumization."

The market, then, is not so much K-shaped as it is barbell-shaped.

"On one end is proof and experience—products people will pay up for because they feel earned through demonstrable results, sensorial pleasure, personalization or brand," says Ignazzi. "On the other end is utility and math: products that win on cost-per-use, multitasking, bigger formats and no-nonsense performance."

But, he warns, "The danger zone is the soft middle, where products are neither meaningfully better nor meaningfully cheaper. That's where brands quietly become interchangeable."

Ignazzi argues, "This is also why 'trading down' is the wrong headline. Many consumers aren't trading down—they're trading sideways. They protect a few emotional or results-driven hero purchases and then value-engineer everything around them through dupes, bundles, simplified routines and smarter replenishment. In other words, the same person can buy a prestige fragrance and a value cleanser in the same trip and feel smart about both."

What will brand building look like in 2026?

Ignazzi urges brands to "create explicit upgrade and downgrade paths, good/better/best that truly feels different. Defend hero products with real moats: substantiation, delivery systems, sensorial signatures, speed-to-results. Use packaging as a pricing instrument: value should look honestly efficient and generous, and premium packaging must earn its footprint by improving the experience or performance."

He concludes, "In a polarized market, the goal isn't to be everything to everyone. It's to be clearly worth it to the people you're built for."



"[B]eauty isn't splitting cleanly by income," says Nick Ignazzi, area sales and operations director, Provital. "It's splitting by confidence."

Courtesy of Provital

Category Realities in a K-Shaped Economy

Fragrance's K-Shaped Boom: Mass Thrives, Luxury Indulges

"Fragrance is the category that most clearly reflects a K-shaped dynamic," says Larissa Jensen, Circana's senior vice president and global beauty industry adviser. "Throughout 2025, we've seen strong performance at both ends of the spectrum: mass fragrance posted double-digit growth, while prestige and luxury fragrance outpaced overall prestige growth. The drivers have remained consistent—on the mass side, luxury-inspired brands and scents continue to excite consumers, while in prestige and luxury, higher-concentration formats are fueling growth as shoppers increasingly value the benefits of indulgence."

[b]www.mckinsey.com/~/media/mckinsey/industries/consumer%20packaged%20goods/our%20insights/state%20of%20beauty/2025/the-state-of-fashion-beauty-june-2025-f.pdf

Performance Rules in a K-Shaped Market: Science-Backed Premium and Smart, Accessible Skin Care

"In skin care, premium growth is fueled by clinically inspired formulations, biotech-derived actives, microbiome-supportive ingredients, and advanced delivery systems that justify higher price points through visible, measurable results," says Chavez. "At the same time, mass skin care continues to gain momentum through streamlined routines, multifunctional products, and hero ingredients that deliver proven benefits. Brands that succeed are those able to translate efficacy across price tiers while maintaining trust and consistency."

Lingren adds, "Trends historically reserved for luxury— dermatological science, more advanced environmentally friendly designs and formulations—are increasingly trickling down into mass brands. Industry leaders are helping to increase the pace of broad availability."

"Social media and generative AI have dramatically lowered barriers to expertise, enabling consumers to interrogate claims, compare products, and demand transparency in ways that were not possible even a decade ago," says Alec Batis, CEO/co-founder of Sweet Chemistry. "Together, these forces are reshaping the beauty industry at a foundational level."

He notes, "What distinguishes the K-shaped economy is not simply a divergence in income, but a convergence in expectations. Across price tiers, today's beauty consumer is more discerning, more informed, and less tolerant of superficial differentiation. Value is no longer synonymous with price; it is defined by performance, credibility and intention."

Batis explains, "At the top of the K, affluent consumers are willing to spend—but only when a brand delivers a truly modern value proposition. This has raised the bar for product development, placing renewed emphasis on formulation integrity, clinically relevant ingredient levels, and manufacturing choices that prioritize efficacy over novelty. Packaging is expected to signal quality and restraint while also addressing sustainability and functional design. Brands such as Sweet Chemistry, Victoria Beckham Beauty, and Chris McMillan Haircare reflect this shift, succeeding not through excess or spectacle, but through clarity of purpose and demonstrable results."

He adds, "In this context, premium beauty is becoming quieter and more disciplined. Technology and science have replaced glamour as markers of status, and marketing is evolving from persuasion to education. Trust, once eroded by years of overpromising, is now the most valuable brand asset."

Meanwhile, says Batis, "At the lower end of the K, constrained spending power has not diminished expectations—it has sharpened them. Entry-level consumers are demanding products that work, even if they cannot afford to splurge. This has fueled the rise of brands such as Bubble, Remedy, Kitsch and Odele, which focus on democratizing expertise through efficient formulations, focused portfolios and honest communication. Ingredient transparency, thoughtful sourcing and simplified routines allow these brands to deliver credible performance at accessible price points without relying on inflated marketing narratives."

Batis concludes, "Ultimately, the K-shaped economy is forcing the beauty industry to grow up. Success now depends less on aspiration and more on accountability—on building brands that can substantiate their claims, respect consumer intelligence, and deliver real value at every rung of the economic ladder."

In this environment, strong efficacy can be a differentiating factor.

"In a K-shaped economy, both high- and low-income consumers seek performance as proof of value, even if their budgets and motivations differ," says Joshua Britton, Ph.D., founder and CEO, Debut. "Across income levels, performance delivers tangible benefit."



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"In a K-shaped economy, both high- and low-income consumers seek performance as proof of value, even if their budgets and motivations differ," says Joshua Britton, Ph.D., founder and CEO, Debut. "Across income levels, performance delivers tangible benefit."

He adds, "For high-income consumers, performance is a differentiator linked to efficacy and science-backed results that other products can't deliver, and it is reinforced by elevated aesthetics, refined textures, and access to exclusive clinical validation. Brands that deliver breakthrough innovation, novel ingredients, robust testing, dermatologist-blinded studies, and compelling data, paired with superior sensoriality, earn the trust of affluent

From top: Courtesy of Sweet Chemistry; Debut

consumers and sustain premium pricing. By contrast, mid- and low-income consumers seek value in fewer, smarter purchases at lower price points, where performance justifies the purchase. Brands that succeed in this tier simplify the science without diluting credibility. They lead with demonstrable efficacy rather than aesthetics."

Britton notes, "Biotechnology delivers on both fronts. Advances in active ingredients that work synergistically at lower concentrations enable entirely new formulations, rather than relying on high percentages of single ingredients such as 20% vitamin C or 10% niacinamide. In addition to offering differentiated performance, biotech beauty also extends the efficacy—and in some cases replaces—costly in-office treatments such as skin tightening, firming and rejuvenation. This reflects a broader shift in beauty spending, with consumers across the board prioritizing results and affordability over how or where products and services are delivered."

Britton concludes, "Economic downturns, while challenging, can also present opportunity, a "reset" in the beauty ecosystem. Academic research, including *MIT Sloan Management Review*'s "When Launching a Product During a Recession Pays Off[c]" (April 2025), shows that brands launching products during macroeconomic downturns often achieve higher sales and longer market lifespans because there is less competitive noise. Factoring in the typical two-year innovation cycle, products in development now will reach shelves in 2027 and beyond, by which time the divergence of the K-shaped economy will likely have narrowed, with science-backed brands breaking exciting new ground."

[c]https://sloanreview.mit.edu/article/when-launching-a-product-during-a-recession-pays-off/

Hair Care in a K-Shaped Market: Scalp Wellness at the Top, Simplified Performance at Scale

"Hair care reflects a similar dynamic [to skin care]," says Chavez. "On the premium end, consumers are investing in scalp health, bond repair, and personalized regimens, treating hair as an extension of overall wellness. In mass segments, growth is driven by simplified repair, frizz control, and everyday performance—products that offer noticeable improvement at accessible prices. This places increased emphasis on formulation efficiency and sensorial experience."

From Oral Healthspan to Everyday Essentials: How a K-Shaped Economy Is Splitting Oral and Personal Care

"Oral care and personal care are also experiencing accelerated bifurcation [seen in other sectors]" says Chavez. "Premium oral care is evolving toward 'oral healthspan,' with enamel-restoring technologies, biotech-derived minerals, and wellness-forward positioning that reframes daily care as long-term maintenance and prevention. Meanwhile, mass consumers continue to prioritize cavity protection, sensitivity relief, and clean-label basics they trust."

Chavez adds, "In personal care, prestige is defined by skin barrier support, microbiome balance, and adaptive formats, while mass growth comes from multifunctional cleansers, deodorants, and body treatments that deliver reliability and value."

Ingredients in a K-Shaped Beauty Economy: Why Versatility, Performance and Cost Discipline Are Now Strategic Imperatives

"Teams are often trying to serve two very different market realities at the same time: one driven by premium expectations, and another shaped by value and accessibility," says Roni Rot, CEO, Jojoba Desert. "This tension shows up very clearly in how products are formulated and how ingredient decisions are made."



"Teams are often trying to serve two very different market realities at the same time: one driven by premium expectations, and another shaped by value and accessibility," says Roni Rot, CEO, Jojoba Desert. "This tension shows up very clearly in how products are formulated and how ingredient decisions are made."

Courtesy of Jojoba Desert

Rot adds, "In premium segments, brands are becoming more deliberate. There are fewer launches, but each one carries higher expectations. Ingredients are expected to deliver measurable performance, refined sensoriality, and credible sustainability within leaner formulations. Innovation here is defined by performance efficiency rather than novelty."

The executive notes, "Value-driven brands face a different challenge. Under margin pressure and supply uncertainty, ingredient decisions prioritize reliability, formulation efficiency, and scalability. Ingredients that can perform multiple roles, simplify formulas, and support consistent production are critical to maintaining quality while controlling costs."

Formulation strategies are evolving to emphasize multi-benefit performance, and materials that deliver reliable results across both high-end and value-driven products.

"This polarization is reshaping portfolio strategy," says Rot. "Rather than developing entirely separate solutions for premium and mass markets, brands and suppliers are increasingly focused on adaptable ingredient platforms. A single



"Brands now need solutions that deliver superior performance while remaining cost-effective and versatile enough to serve two very different consumer segments: those seeking premium, science-backed products and those prioritizing affordability and practicality," says Michael A. Lull, director of marketing, personal care NA, Ashland.

material may need to support different textures, performance levels, or positioning strategies across price tiers and geographies."

He adds, "Sustainability remains part of the conversation, though it is being reframed. In premium brands, it often reinforces brand values and differentiation. In value-oriented products, it is more closely tied to efficiency, waste reduction, and smarter use of resources. In both cases, sustainability is expected to deliver practical results."

Rot concludes, "As the market continues to polarize, broad marketing claims are losing relevance. Clear explanations, ingredient transparency, and proven performance matter more than ever. Ultimately, the K-shaped economy is accelerating a structural shift in beauty. Ingredients are becoming strategic assets that shape portfolio flexibility, cost structures, sustainability performance, and brand credibility."

"Brands now need solutions that deliver superior performance while remaining cost-effective and versatile enough to serve two very different consumer segments: those seeking premium, science-backed products and those prioritizing affordability and practicality," says Michael A. Lull, director of marketing, personal care NA, Ashland.

He adds, "Ingredient suppliers can play a pivotal role by focusing on multifunctional innovations that simplify formulations and reduce costs without compromising efficacy or quality. Developing ingredients that offer multiple benefits such as conditioning, rheology modification, and sensory enhancement in a single molecule enables brands to streamline their portfolios and lower manufacturing complexity. Hybrid or performance elevating technologies such as polymers that provide both styling and rheology modification, or materials that provide enhanced benefits while reducing or replacing multiple materials in formulations enable brands to create differentiated products while minimizing the need for additional additives."

Lull argues, "Cost efficiency is equally critical. Highly efficacious ingredients that perform at low dosages allow brands to maintain superior results while controlling costs. Scalable manufacturing solutions, further reduce operational expenses and support sustainability goals. These efficiencies are essential for mass market products, where price sensitivity is high, but they also appeal to premium brands seeking eco-conscious production."

In a bifurcated market, versatility is essential. Winning suppliers will pair high-efficacy, science-backed ingredients with sustainability for premium consumers, while offering cost-efficient, multifunctional solutions that preserve performance and sensorial appeal for value-focused shoppers.

Lull explains, "Technology and sustainability will underpin these strategies. Digital formulation tools and predictive modeling can accelerate product development and reduce waste, while circular solutions like ingredients sourced from upcycled feedstocks or renewable resources offer a compelling story for both ends of the market. These approaches allow suppliers to deliver innovation that is not only high performing but also aligned with evolving consumer expectations around environmental responsibility."

Finally, he says, "[I]ingredient suppliers must act as strategic enablers in this new economic landscape. By delivering multifunctional, high-performance solutions that optimize cost and complexity, suppliers empower brands to thrive in a market defined by divergence and differentiation meeting aspirations at the top while ensuring accessibility at the base. The ability to balance innovation with affordability will determine which players succeed in building resilient, futureproof portfolios."

Packaging in a K-Shaped Beauty Economy: How Design, Sustainability and Shareability Win at Both Ends of the Market

"The widening wealth gap is reshaping the beauty landscape, creating a polarized market where price-conscious and premium seeking consumers coexist," says Stein. "While many U.S. consumers are spending less on beauty care, many high-income shoppers continue to splurge. Effective packaging strategies can help beauty care brands appeal to consumers at both ends of the economic spectrum."

Stein adds, "Packaging plays a critical role in signaling a premium positioning. Bespoke pack designs that are difficult to replicate can protect against commoditization and dupes. Luxe materials and finishes—such as metallic accents, soft-touch coatings and direct decoration—reinforce premium positioning, while minimalist design cues communicate efficacy, transparency, and clean ingredients."

She concludes, "Because image is essential on social media, brands must cultivate strong packaging aesthetic appeal that is not only memorable but shareable. Unique bottle shapes and Insta-worthy brand design can help brands create buzz across online platforms. Secondary

Courtesy of Ashland



"The widening wealth gap is reshaping the beauty landscape, creating a polarized market where price-conscious and premium seeking consumers coexist," says Stein. "While many U.S. consumers are spending less on beauty care, many high-income shoppers continue to splurge. Effective packaging strategies can help beauty care brands appeal to consumers at both ends of the economic spectrum."

packaging also offers opportunities for engagement, as unboxing videos are becoming increasingly prevalent on social media."

"Across all categories, packaging strategy has become a critical lever," says Chavez. "Premium brands are using refill systems, elevated materials, and design-led formats to signal longevity and responsibility. Mass brands are prioritizing lightweight, efficient packaging—thinner walls, fewer components, and mono-material structures—to reduce cost, freight, and environmental impact while meeting sustainability expectations. Early collaboration between formulation, packaging, and manufacturing teams is essential to ensure these strategies are scalable and cost-effective."

"The beauty industry is changing fast, and the K-shaped economy is making the split impossible to ignore," says Amy Pan, CEO of Epopack. "Consumers are spending more selectively, choosing products based on what matters most: whether that's quality, values, or price. That divide is shaping how brands develop products, and it's especially visible in the way they approach packaging."

She continues, "From a packaging manufacturer's perspective, sustainability sits at the center of both ends of the market, even if it looks different for each. Premium brands think long term. Packaging isn't just a container, it's part of the experience, influencing how a product looks, feels, and lives with the consumer. Sustainable materials are expected, but so is refinement. The question has shifted from 'Is this responsible?' to 'Does this reflect who we are as a brand?'"

Pan adds, "Value-driven brands are equally focused on sustainability, but in a more practical way. Consumers want responsible choices that don't compromise accessibility or price. This drives demand for simpler, recyclable packaging, PCR materials, and efficient, scalable designs. Here, sustainability is about making smart choices that work in the real world."

Lingren notes, "While sustainable packaging isn't new, it's now more important than ever with tightening packaging regulations in most markets. And at ICONS America, we continue to explore, develop and design new sustainable products, as consumer demands continue to shift towards more sustainable choices. This is reflected in our growing selection of mono-material, PCR and ocean plastic material, recyclable and refillable products."

"Across the board, one thing is clear: consumers want transparency," says Pan. "They want to know what packaging is made from, how to recycle it, and whether sustainability claims are meaningful. Brands are responding by being more deliberate with packaging decisions and involving manufacturing partners earlier in the process.

She concludes, "In a K-shaped economy, there's no single path forward. But sustainability is the common foundation, helping brands stay true to their values, connect with consumers, and navigate a split market with confidence."

Agility Wins in a Polarized Beauty Market: Why Flexible, Sustainable Manufacturing Is the New Competitive Edge

"Manufacturing agility underpins success in a K-shaped market," says Chavez. "Brands increasingly require partners that can support multiple price architectures, flexible batch sizes and rapid innovation without compromising quality or compliance… In 2026, success will favor brands that compete with clarity across an increasingly polarized beauty landscape."

Sustainability also remains a key consideration in the manufacturing space.

"One elemental trend that is shared across both economic tiers is a desire for products with greater sustainability," says Lingren. "The industry leaders continue to invest in using post-consumer and recyclable materials and are also investing in more localized sourcing to reduce their carbon footprint."

The executive adds, "Companies

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like ICONS America benefit from greater supply chain agility, with our production in the United States at our headquarter manufacturing facility in North Carolina and the majority of raw materials sourced from the United States, and our Taiwan Branch, which provides clients with a wide range of primary packaging and the best in global sourcing solutions."

Size Matters: Travel Size, Large Formats& Refillables

"Scaled formulations and packaging innovation—such as travel- and personal-sized products—make advanced beauty accessible at lower price points," says Lingren. "At ICONS America, we are seeing demand for travel-friendly beauty booming, whether it's try-before-you-buy sampling or travel-friendly touch-ups, consumers expect the same performance, sustainability and aesthetic appeal as full-size packaging."

He continues, "In response, we have a growing range of travel-size packaging options in all products categories including petite and portable tubes, jars, bottles, tottles, wands and sticks. And our 35 mmD and 40 mmD in-Mold Label tubes prove that smaller doesn't mean less effective. With fill capacities from 30-160 ml (1-5.5 oz), they offer the perfect balance between full-size and travel-ready convenience."

"As cost consciousness increases, right-sizing strategies are becoming essential," says Stein. "Mini and trial sizes lower barriers to entry, encourage experimentation, and reduce perceived risk, while also supporting travel and impulse purchase occasions. Conversely, value-oriented consumers are drawn to larger formats that offer a better price-per-unit. Refillable and lightweight packaging systems deliver both economic and sustainability benefits, improving margins while appealing to environmentally conscious shoppers. According to Euromonitor [report unavailable publicly], "beauty pouch sales rose 5.5% in 2024, with room for further development." ■



In 2026, beauty brands will thrive by partnering with agile, sustainability-focused manufacturers capable of supporting multiple price tiers, flexible batch sizes, rapid innovation, and localized, eco-conscious sourcing without compromising quality or compliance.



Travel- and personal-sized formulations and packaging are increasingly essential, making high-performance, sustainable beauty more accessible, convenient and affordable, while encouraging sampling, experimentation and impulse purchases.

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CAN BEAUTY REALLY BE LOW-CARBON? OUR EXPERT SAYS YES.



"Carbon-conscious formulation represents a growing commitment within the cosmetics industry to minimize environmental impact by reducing the carbon footprint across the entire product lifecycle," says Univar's Irena James.

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Low-carbon beauty is moving from ambition to execution—and the margin for vague claims is disappearing fast. As regulators sharpen scrutiny and consumers demand proof, beauty brands are being pushed to rethink how carbon impact is reduced, measured, and communicated across the entire product lifecycle. In this *Global Cosmetic Industry* executive briefing, Univar Solutions' Irena James break down what credible low-carbon strategies look like today, from carbon-conscious formulation and decarbonized ingredient technologies to the next generation of carbon claim labels designed for clarity, not confusion. Their insights offer a practical roadmap for brands looking to cut emissions without compromising performance—while turning sustainability transparency into a competitive growth lever.

Beyond the Label: Why Clarity is the New Currency in Sustainable Beauty

"Carbon claim labels are becoming an important part of sustainability communication in beauty and personal care," says Irena James, sr. business development manager, beauty and personal care, ingredients + specialties at Univar Solutions. "But a label alone is not enough. Consumers want clarity and context. While packaging is often the first place that consumers look for sustainability information, many still don't actively research how sustainable a beauty brand is. It is essential for brands to provide clear, prominent messaging on packaging that explains what carbon neutrality or reduction truly means."

James adds, "Future carbon labels will likely go beyond stating just 'carbon neutral,' and instead break down where emissions occur in the product lifecycle, how they are reduced, and what actions consumers can take. Visual comparisons and simplified explanations, such as equating emissions to everyday items, will make abstract metrics like kilograms of CO_2 more tangible and relatable. This transparency helps build trust and elevates purchasing decisions."

This shift toward more detailed and transparent carbon labeling reflects a broader trend in sustainability communication. It's no longer just about meeting standards but empowering consumers with actionable insights. As brands embrace this approach, tools and strategies that simplify complex data become essential for fostering trust and making sustainability a core part of the conversation.

"Beyond raw materials, suppliers can provide tools like the Imp'Act Card," says James, "which helps simplify complex sustainability data into actionable insights on environmental impact, traceability and social responsibility. By leveraging these resources, brands can strengthen transparency, communicate authentic sustainability stories, and build consumer trust through informed marketing and packaging strategies."



"Carbon claim labels are becoming an important part of sustainability communication in beauty and personal care," says Irena James, sr. business development manager, beauty and personal care, ingredients + specialties at Univar Solutions. "But a label alone is not enough."

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From Product Lifecycles to Transparency: Putting Innovation into Action

"Carbon-conscious formulation represents a growing commitment within the cosmetics industry to minimize environmental impact by reducing the carbon footprint across the entire product lifecycle," says James. "This approach integrates sustainable sourcing of raw materials, prioritizing renewable and low carbon ingredients."

The executive adds, "Manufacturing practices are optimized for energy efficiency and low-emission processes, often leveraging cold-processing technologies or using renewable energy during the production step to help reduce energy consumption. Packaging strategies complement this effort by incorporating recyclable or biodegradable materials and reducing unnecessary bulk."

She continues, "Beyond production, carbon-conscious design also considers transportation and supply chain logistics, favoring local sourcing and lightweight packaging to lower emissions."

Aligning Beauty Innovation with Environmental Responsibility

"Equally important is transparency with consumers," says James, "clearly communicating the types of ingredients used and their environmental impact. As formulators, we have a responsibility to select ingredients that respect biodiversity and sustainability principles."

She notes, "For example, we can propose cold-processing and energy-saving methods to further reduce the ecological footprint. This helps ensure that beauty innovation not only delivers high-performance results, but also aligns with global environmental goals, supporting both skin health and environmental well-being."

4 Steps for Reducing Beauty's Carbon Footprint

"Reducing carbon footprint requires a multi-layered approach that combines operational changes with consumer education," says James, who shares four key steps:

1. **Material and ingredient choices:** Prioritize renewable energy in production and environmentally sourced ingredients to embed sustainability from the start.
2. **Packaging innovation:** Move toward biodegradable, compostable, plastic-free, and recyclable packaging. These claims resonate strongly with younger consumers, especially in trending categories like skin care and hair care, where Gen Z and Gen Alpha are driving demand for environmentally-friendly solutions.
3. Simplify sustainability com**munication:** Consumers often find sustainability statistics overwhelming. Put commitments front and center on packaging and make them easy to understand. Use visuals and relatable comparisons to explain carbon impact.
4. **Technology and partnerships:** Leverage advanced solutions like Dow's Decarbia silicone elastomer technology, which decarbonizes the most carbon-intensive part of silicone production, silicon metal feedstocks. This innovation delivers carbon-neutral silicones verified by PAS 2060, offering equal product performance while helping brands move closer to net-zero targets.

"By combining these strategies, brands can reduce emissions while reinforcing transparency and trust," James concludes.



"Manufacturing practices are optimized for energy efficiency and low-emission processes," says James, "often leveraging cold-processing technologies or using renewable energy during the production step to help reduce energy consumption."

Navigating the Green Maze: Surprises in Sustainability Marketing

According to James, companies are often surprised by the elements that can impact the carbon footprint of products and brands.

"One major surprise is that consumer expectations go beyond simple claims," she explains. "While some consumers associate sustainability with carbon offsetting, others prioritize renewable energy use and ethical sourcing."

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"Sustainability metrics like kilograms of carbon or hectares of rainforest often confuse consumers," says James. "Without context, these numbers can lack meaning."

James continues, "Another unexpected challenge is the complexity of communication. Sustainability metrics like kilograms of carbon or hectares of rainforest often confuse consumers. Without context, these numbers can lack meaning. Brands are learning that simplifying the message, through clear packaging claims and visual storytelling, is just as important as the technical work behind carbon reduction."

Finally, she concludes, "Many brands are also surprised by the business impact of ESG-related claims. Some products and brands making sustainability commitments have shown stronger cumulative growth over the past five years compared to those without such claims. Younger consumers, in particular, are willing to pay more for environmentally-friendly products and actively seek brands that align with their values. For some brands, sustainability can be a potential market growth driver."

5 Key Takeaways for Beauty R&D and Marketing Leaders

1. **Clarity is Key:** Vague sustainability claims are no longer enough. Consumers and regulators demand clear, transparent communication about your carbon reduction efforts. Go beyond simple"carbon neutral" labels and explain the *what*, *where* and *how* of your emissions strategy directly on your packaging.
2. **Rethink Formulation & Sourcing:** Carbon-conscious formulation is critical. R&D leaders should prioritize ingredients produced with renewable energy, leverage cold-processing methods to save energy, and partner with suppliers who offer decarbonized ingredient technologies, like carbon-neutral silicones, to reduce impact without sacrificing performance.
3. **Innovate in Packaging:** Move toward biodegradable, compostable, plastic-free, and recyclable packaging. These claims strongly resonate with younger consumers (Gen Z and Gen Alpha), who are driving demand for environmentally friendly solutions in key categories like skin care and hair care.
4. **Simplify Your Message:** Sustainability metrics can be confusing. Marketing leaders must translate complex data (like kilograms of CO_2) into simple, relatable comparisons. Use visual aids and clear front-of-pack messaging to make your carbon impact tangible and build consumer trust.
5. **Sustainability Drives Growth:** Don't underestimate the commercial power of ESG claims. Brands with strong sustainability commitments have shown higher cumulative growth over the last five years. Younger consumers are willing to pay more for products that align with their values, turning transparency into a competitive advantage and a significant market growth driver. ■

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Faster, Smarter, Scalable Private Label Skin Care: Q&A with Next Beauty Labs CEO, Warren Becker

Why flexibility, speed and clear guidance matter more than ever, and how brands can navigate an uncertain 2026 marked by cost pressures and consumer caution.



Warren Becker is stepping into the spotlight with the launch of Next Beauty Labs. Based in Boca Raton, Florida, the private label skin care manufacturer is built for the realities of today's fast-moving beauty market.

Courtesy of Next Beauty Labs

After more than two decades spent behind the scenes helping thousands of beauty brands develop, scale, and succeed, Warren Becker is stepping into the spotlight with the launch of Next Beauty Labs. Based in Boca Raton, Florida, the private label skin care manufacturer is built for the realities of today's fast-moving beauty market—where speed, scientific credibility, and operational agility are no longer nice-to-haves, but table stakes. Drawing on experience across formulation, manufacturing and brand incubation, Becker created Next Beauty Labs to serve founders, medical professionals, indie labels and established players with what he characterizes as a more responsive, partnership-driven model.

Next Beauty Labs offers full-service, turnkey support—from semi-custom and ready-to-launch formulations to packaging, compliance, and brand development—while specializing in clean, treatment-based, clinical-grade products. With flexible MOQs, shorter lead times and an emphasis on long-term collaboration, the company aims to help brands move from concept to creation without compromise.

From Vendor to Partner: Q&A with Next Beauty Labs' Warren Becker

As brands launch faster, operate leaner, and face rising pressure around clinical credibility, transparency and compliance—often with tighter budgets and shorter timelines—the role of the contract manufacturer has shifted from vendor to strategic partner. In this Q&A, Becker digs into why flexibility, speed and clear guidance matter more than ever; how brands can navigate an uncertain 2026 marked by cost pressures and consumer caution; and what separates the beauty companies that merely launch from those that truly scale.

In the following Q&A, Becker shares why he believes private label manufacturing is being reimagined, what today's beauty entrepreneurs need most from their partners, and how Next Beauty Labs is designed to help brands launch faster, grow smarter, and win bigger.

Next Beauty Labs was created after more than 20 years of working closely with beauty founders, medical professionals, and product development teams, and seeing firsthand how dramatically the way brands are built has evolved.

Building Scalable, High-Quality Skin Care Brands

Becker: Today's brands move faster, launch leaner, and make more intentional decisions than ever before. Whether it's a doctor developing a treatment line, a med spa expanding into retail, or a founder bringing their first product to market, the need is the same: a partner who can move quickly, stay flexible, and offer real guidance without compromising quality or compliance.

I've spent years watching brands struggle, not because their ideas weren't strong, but because the path from concept to finished product was harder than it needed to be. Many brands and founders are operating with limited capital, tighter timelines, and higher consumer expectations. They need access to proven, clinical-grade formulations, reasonable minimums, and teams who understand how to turn a vision into something real and scalable. That's why Next Beauty Labs was created. We focus on making the process clearer, faster, and more approachable, offering low-MOQ, fast-turnaround private label skin care, paired with hands-on operational support.

At the end of the day, our goal is simple: to be a true partner in our customers' success. Someone they can trust to help make smart decisions, simplify the complicated, and build products they're proud to put their name behind.

Building a Resilient Brand in a Volatile Market

Becker: A lot is happening at once. Costs are still moving around, especially raw materials and packaging, and consumers are being more careful with discretionary spending.

At the same time, expectations around compliance, documentation, and transparency keep rising. Founders and investors are also being much more thoughtful about where capital goes and how it's used.

My advice to brands is to focus on resilience, not perfection. Keep your product line tight. Don't over-customize too early. And work with partners who help you move efficiently without forcing you into commitments that don't make sense for where you are today.

Flexibility really matters right now, and the ability to adapt quickly is a big advantage.

Trends in Product Development: Credibility, Simplicity and Transparency

Becker: One big shift is toward clinical credibility over hype. Consumers are smarter and more skeptical than ever, and they want to understand why something works, not just what it claims to do. Brands that can clearly explain performance, ingredients, and formulation choices are going to stand out.

We're also seeing a real move toward simplification. Fewer SKUs, more intentional routines, and stronger hero products. Multifunctional products that do more with less are becoming more attractive, both for consumers and for brands trying to stay focused.

Transparency is another major theme. Brands are increasingly open about how products are formulated and made. That transparency builds trust and becomes part of the brand story itself.

And finally, iteration cycles continue to shorten. Brands want to test, learn, and refine quickly instead of betting everything on massive launches. For manufacturers, that means offering validated base formulas, modular customization, and clear paths to scale, not reinventing the wheel every time.

The Founder's Playbook: What Separates the Good from the Great

Becker: The brands that do well tend to have a few things in common. They understand their customer deeply and stay focused on serving that audience. They treat operations as a real part of the business, not something to figure out later. And they make decisions based on execution and data, not just trends or hype. They're also willing to take smart risks, listen, and adjust quickly.

And just as importantly, they know what not to do. Strong founders resist the urge to overbuild too early. They prioritize clarity and repeatability before expansion, which gives them a much stronger foundation as they grow.

What Next Beauty Labs Looks for in a Partner

Becker: We look for alignment more than size. The best partnerships come from founders who have a clear vision, realistic expectations around timelines and costs and a willingness to communicate openly.

Understanding the importance of quality and compliance goes a long way, as does thinking long term. We're at our best when we're working with founders who see manufacturing as a strategic partnership, not just a transaction. When that mindset is there, collaboration becomes easier and outcomes improve for everyone.

Scaling Pains: Navigating Growth in the Brand World

Becker: Early-stage and indie brands often struggle with limited budgets,

over-customizing too early, and figuring out which SKUs to launch first.

Many are learning the operational side of the business while trying to move quickly. As brands grow, the challenges shift.

Managing demand without breaking the supply chain becomes critical. Staying focused, product consistency, regulatory requirements, and accurate forecasting all become much more complex.

For more established brands, the focus usually turns to scaling efficiently, optimizing costs, consolidating vendors, standardizing processes, and staying agile as the organization grows.

What Makes a Great Manufacturer?

Becker: A strong manufacturer brings more than production capacity. They are responsive, have solid quality systems, clear documentation, and consistent processes.

They communicate openly, have the right infrastructure for your stage, and bring real formulation and production expertise to the table.

Just as important, they're willing to educate and guide their partners. The best manufacturers help brands avoid mistakes before they happen. Long-term relationships are usually a good signal that a manufacturer is doing something right.

Raising the Bar: Clarity, Accountability and Better Partnerships

Becker: More than anything, brands need clarity and partnership. That means honest guidance instead of vague promises, realistic timelines, clear cost structures and predictable execution.

Accountability really matters. There's a real opportunity for the industry to raise the bar by being more proactive and communicative. Manufacturers shouldn't just respond to requests; they should help brands think through decisions before problems show up.

Building Better Partnerships: Alignment, Trust and Shared Goals

Becker: Strong partnerships come down to alignment and trust. That starts with open communication and shared goals, and it grows through transparency on both sides.

Treating each other as strategic partners instead of vendors makes a huge difference. Respecting processes, timelines, and documentation goes a long way.

So does approaching challenges as shared problems to solve, rather than assigning blame.

When both sides understand each other's pressures and incentives, the relationship becomes more productive and much more resilient. ■



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"Social Media has tremendously broken down the stigma of tattoos and even helped elevate them to art," says Chi Quan Do, supervising chemist at Renu Labs LLC.

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Face-Grade Body Care, Sculpting Actives and Next-Gen Ingredients: WHAT'S DRIVING PERFORMANCE IN 2026

Across body care, the trend is clear: consumers now demand face-grade efficacy, ethical sourcing and inclusivity.

For years, the spotlight in beauty has been on facial skin care, even though the same concerns—acne, sagging, crepiness and signs of aging—extend to the body. Now, a new wave of brands is fueling the "skinification" of body care, with collagen and retinol body lotions leading the charge. Collagen body lotions, for example, have surged 154.5% year-over-year, per Spate, with TikTok driving the trend (76.9% popularity share) and Instagram showing over 1,000% growth. Retinol body creams are also booming, up 150.6% across platforms, as ingredient-savvy consumers increasingly seek products that combine performance with visible results. And, looking ahead, Spate[a] is predicting body skin care will continue to boom, with top trends including Korean body scrubs, shower oils and body lotions.

"Consumers are moving beyond basic hydration—body care now mirrors facial skin care, with growing demand for actives that brighten, smooth, firm and repair," say Cilver Coleman, technical marketing coordinator, and Anne Young, technical business development manager, Croda. "With 82% of women globally seeking 'face-grade' benefits, shoppers increasingly expect visible results, not just a sensorial experience."

Coleman and Young add, "Retinol, AHAs, ceramides, peptides and trending biotech actives like PDRN are rapidly expanding into body care. With technologies such as [Croda's] SphingoCare for barrier and hydration support across rinse-off and leave-on formats and Regestril for stretch-mark improvement, these actives now target texture, pigmentation, barrier repair and firmness—bringing true face-grade performance to the body."



"Consumers are moving beyond basic hydration—body care now mirrors facial skin care, with growing demand for actives that brighten, smooth, firm and repair," say Cilver Coleman, technical marketing coordinator, and Anne Young, technical business development manager, Croda.

[a]https://www.spate.nyc/reports/2026-beauty-wellness-predictions-the-trends-set-to-shape-the-year-ahead

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High-Performance Body Actives Target Contours, Volume and Firmness

Provital's Sculpup, a smart pro-adipogenic active derived from COSMOS-certified, 100% natural *Rubus fruticosus* (blackberry), amplifies the contours of authentic beauty. Inspired by aesthetic surgery techniques, it delivers a push-up and volume effect for bust and buttocks, supporting post-pregnancy, post-breastfeeding, menopause and post-weight-loss consumers. Sculpup stimulates adipogenesis while reducing lipolysis, reinforces collagen and extracellular matrix and helps prevent fibrosis and the orange-peel appearance. It is vegan-compliant, patent-pending and targeted for body sculpture applications in high-performance care actives.

Complementing this volumizing effect, Provital's Lipout, a marine plankton-based active from Tisochrysis *lutea*, targets slimming and contouring. Lipout activates thermogenesis in adipocytes to burn stored fat, reduces localized body volume in the abdomen, hips and thighs and diminishes the appearance of cellulite. It also improves skin firmness, elasticity and overall body contours, while being paraben- and preservative-free. Together, Sculpup and Lipout represent a new generation of body-sculpting actives that combine efficacy, natural origin and visible results, helping consumers achieve lifted, toned and smooth body contours.

Citrus Brings Facial-Grade Science to Neck & Décolleté Care

As body care continues to "skinify," Chemyunion is extending facial-grade science to one of the industry's most age-sensitive zones: the neck and décolleté. The supplier has introduced Ecoffea Citrus, a vegan, 100% natural-origin active derived from upcycled green coffee and Sicilian lemon by-products, designed to boost cellular longevity and visibly rejuvenate skin in 28 days. The ingredient taps into growing cross-generational demand—from boomers to Gen Z—for high-performance body formulations that address firmness, texture and wrinkles with the same rigor as face care.

Ecoffea Citrus targets key biological drivers of aging by stimulating sirtuin-3 (SIRT-3) expression (+33% vs. placebo ex vivo) to support cellular repair, while boosting Type I, III and IV collagen and fibronectin—critical to dermal structure and elasticity. In vivo 3D imaging of the neck and décolleté showed improvements in skin texture, elasticity and wrinkle reduction after 28 days at 0.5% use level. With its upcycled sourcing and efficacy-backed positioning, Ecoffea Citrus underscores Chemyunion's sustainability-led innovation strategy as body care moves firmly into prestige, results-driven territory.



Taking cues from pro treatments, Provital's Sculpup offers contouring and other benefits.

Image by Coka at Adobe Stock



As body care continues to "skinify," Chemyunion is extending facial-grade science to one of the industry's most age-sensitive zones: the neck and décolleté.

Revolutionizing Tattoo Care with Science-Backed Solutions

"Tattoos are now an extension of cosmetic and even medical technology…" says Chi Quan Do, supervising chemist at Renu Labs LLC. "Tattoos are… being used to restore natural skin tone after some surgeries and to make permanent makeup. As a result, Renu Labs LLC has developed tattoo care formulas to help protect tattoos from sun fading and balms that help restore the skin's natural barrier."

These solutions include balm formulas based on the skin's natural moisturizing oils, which reportedly help restore and care for tattooed skin. "Additionally," says Do, "we have mineral sunscreens that help protect the skin from UV damage, loaded with antioxidants to help maintain lively colors."

Do notes, "Social Media has tremendously broken down the stigma of tattoos and even helped elevate them to art. Renu Labs LLC has developed formulas that care for tattoos with the attention to detail that fine art demands."

The chemist adds, "People want to proudly display their artwork in the best possible frame, which makes caring for the skin over the tattoo very important. Today's customers are looking for modern ways to maintain their tattoos' best appearance and the formulas that Renu Labs LLC has developed can assist in that goal."

A Mild, Versatile Surfactant Blend for Modern Personal Care

Lamberti has launched Eucarol Easy MB, a concentrated, powder surfactant blend designed for mild yet effective cleansing in a wide range of personal care formulations. Combining Disodium Cocoyl Glutamate and Disodium Coco-glucoside Citrate, the ingredient, which is distributed by RITA Corp., offers high foaming performance, excellent skin and hair compatibility and a soft, conditioning feel. Both components are derived from vegetable raw materials and manufactured under the RSPO Mass Balance model, underscoring Lamberti's commitment to sustainable sourcing.

The multifunctional powder is ideal for skin, hair and baby care, including solid or concentrated formats like bars, powders, mono-doses and balms. Its solubility in water and compatibility with other surfactants, coupled with easy thickening and creamy foam generation, allow formulators to create high-performing, water-efficient products. Lamberti emphasizes safe handling and storage, with a 24-month shelf life under standard conditions. Eucarol Easy MB positions itself as a solution for the growing demand for mild, sustainable and versatile surfactants in next-generation personal care products.

Beyond the Neck: Body Care's Glow Up

For marketers, these innovations offer rich storytelling potential: ingredients for contouring and sculpting, technologies for neck and décolleté rejuvenation and tattoo care formulas for protection and color longevity. R&D and product developers can leverage these ingredients to create multi-functional, high-performance and clean-label formulations that satisfy consumers' growing expectations for visible results and sustainability. Across body care, the trend is clear: consumers now demand face-grade efficacy, ethical sourcing and inclusivity, providing a roadmap for brands to deliver differentiated, results-driven offerings in 2026 and beyond. ■

Image by buritora at Adobe Stock



Across the industry, suppliers are harnessing upcycled waste, biotechnology and regenerative farming to expand the palette of high-performance, ethical ingredients.

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Vantage Personal Care's Angel-Eye EFX leverages centuries of Asian herbal knowledge to support eye-area hydration and reduce wrinkles through improved microcirculation.

Next-Gen Ingredients Cutting Through the Noise in Clean Skin Care

Around the world, clean and sustainable skin care brands are facing growing competition, with many struggling to differentiate themselves or substantiate eco-friendly and safety claims. At the same time, clinically driven, results-focused products continue to capture market share. A new wave of innovative ingredients is now bridging this gap—offering formulators solutions that are sustainable, safe and clinically effective, enabling brands to deliver the performance, transparency and eco-conscious credentials today's consumers demand.

For instance, Vantage Personal Care's Angel-Eye EFX, Tucum-HA EFX and Lipovol Origin Cacay are three innovative, sustainable ingredients designed to meet growing consumer demand for effective, eco-conscious skin care. Angel-Eye EFX leverages centuries of Asian herbal knowledge to support eye-area hydration and reduce wrinkles through improved microcirculation. Tucum-HA EFX, a blend of tucuma oil, hyaluronic acid and jojoba esters, boosts fibroblast hyaluronic acid synthesis and recently won a gold sustainability award at In-Cosmetics Latin America. Finally, Lipovol Origin Cacay, the "Amazonian Gold" cold-pressed oil from the Colombian rainforest, delivers luxurious skin and hair benefits while supporting traceable, community-driven production.

While these materials demonstrate how tradition and science can merge, they are far from the only innovations redefining the space. Across the industry, suppliers are harnessing upcycled waste, biotechnology and regenerative farming to expand the palette of high-performance, ethical

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ingredients. From bio-fermented actives that rival synthetic retinols to plant-based silicones derived from sustainable forestry, the following examples showcase the diverse range of solutions available to brands looking to prove that"clean" can also mean"clinically superior."

A Botanical Eye Contour Active That Mimics Red Light Therapy

LipoTrue's OQilora is a high-performance botanical active designed to rejuvenate the delicate eye contour area. Drawing on traditional Chinese medicine and modern science, OQilora combines *Astragalus* root for vitality and resilience with *Passiflora* flower for calming effects, aiming to stimulate mitochondrial ATP production and activate GABA receptors.

According to LipoTrue, this dual-action mechanism relaxes micro-contractions, promotes collagen synthesis and reduces expression lines, delivering visible improvements in dark circles, puffiness and early wrinkles—offering results reminiscent of red-light therapy.



According to LipoTrue, its new ingredient offers results reminiscent of red-light therapy.

A Sustainable, High-Performance Botox Alternative

Chemyunion's Peptid4 B-Like is emerging as a next-generation, topical alternative to botulinum toxin for wrinkle reduction, now available to formulators seeking high-performance, sustainable ingredients. Developed through advanced molecular modeling, this Botox-like tetrapeptide targets α-sites of nicotinic cholinergic receptors, reducing muscle contraction and delivering visible wrinkle smoothing in just 14 days—with clinical studies showing up to 20% reduction in periorbital wrinkles and significant improvement in skin elasticity.

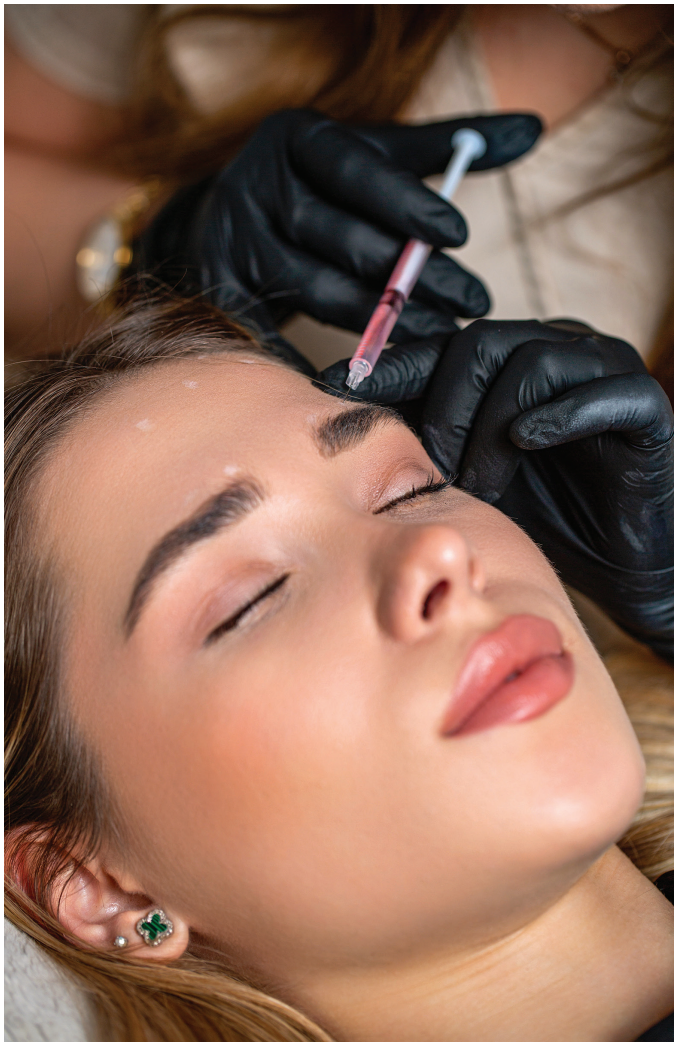
Beyond efficacy, Peptid4 B-Like stands out for its eco-conscious production, meeting 10 of 12 principles of Green Chemistry, using renewable raw materials, and achieving 99.86% natural origin (ISO 16128). Its cost-effective, high-purity synthesis makes it a scalable solution for brands looking to offer consumers affordable, non-invasive anti-aging results without injections, while supporting sustainability and clean beauty trends.

A Botanical Active for Sensitive Skin

BASF has introduced Ameriflor Calm, a botanical active derived from Self-Heal (*Prunella vulgaris*), designed to help consumers strengthen sensitive skin. Combining traditional plant knowledge with modern science, the ingredient reduces redness, supports the skin barrier and protects against environmental stressors.

Clinical studies reportedly show a 10% improvement in skin redness in just 7 days and an 11% boost in moisture retention compared to a placebo. Sourced from regenerative organic farms in Oregon and produced at a U.S. facility powered by 100% renewable electricity, Ameriflor Calm delivers sustainable, high-performance skin care for sensitive eco-conscious consumers.

Image by Streliuc at Adobe Stock



No needles required: Chemyunion's Peptid4 B-Like is emerging as a next-generation, topical alternative to botulinum toxin for wrinkle reduction, now available to formulators seeking high-performance, sustainable ingredients.

A New Plant-Derived Exosome Technology for the U.S. Anti-Aging Market

DSM-Firmenich has unveiled Exovive Lift, a skin care ingredient based on plant-derived exosome technology, now available for formulators seeking next-generation anti-aging solutions. Harnessing natural cellular communication from Alpine apples, Mediterranean tangerines and Sicilian papayas, Exovive Lift reportedly delivers clinically validated rejuvenation, reportedly improving skin elasticity by 33% and visibly reducing wrinkles by up to eight years after two months of use.

Backed by regenerative medicine and longevity science, the ingredient uses trillions of extracellular vesicles as messengers to modulate proteins and miRNAs that support renewed skin vitality, outperforming conventional fruit extracts in efficacy, per DSM-Firmenich. Produced via an

Image by Yevhen at Adobe Stock





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eco-friendly extraction process from Italian biodiversity-rich sources, Exovive Lift offers a sustainable, high-performance solution for brands targeting U.S. consumers seeking visible anti-aging results with clean, science-driven ingredients.

Skin-Firming Sesame Protein with Rapid Results

Seiwa Kasei has launched Sesaqua P, a 100% natural, upcycled sesame protein, a sustainable ingredient that combines visible anti-aging results with long-term skin health benefits. Derived from sesame oil pomace, this botanical peptide supports collagen remodeling, enhances cathepsin B activity by 17% and purportedly delivers instant wrinkle reduction in just five minutes, making it a high-performance addition to lotions, serums and firming creams.

Beyond efficacy, Sesaqua P aligns with sustainability trends, turning what was once waste into a COSMOS- and NMPA-compliant, plant-based cosmetic asset. With additional benefits including melanin suppression, moisturizing and immediate skin-firming effects, the ingredient empowers brands to meet rising consumer demand for clean, eco-conscious, and scientifically validated skin care solutions.

Redefining Niacinamide with Fermentation Technology

TRI-K's NiaPure introduces a next-generation, low-irritation niacinamide targeting sensitive and reactive skin. Using advanced fermentation technology, NiaPure delivers high-purity niacinamide with 10x less nicotinic acid, per the company, minimizing irritation while visibly brightening skin, evening ton and regulating sebum.

Dermatologically tested, vegan,

Image by Anastasia Shuraeva at Pexels

palm-free and GMO-free, NiaPure is reportedly ideal for brightening serums, moisturizers and daily care products that balance efficacy with gentle, safe use.

A 100% Biobased, High-Purity Alternative to Petrochemical Glycolic Acid in the U.S. Market

Phycus Biotechnologies is shaking up the U.S. skin care industry with Purolic Acid, a 100% biobased glycolic acid produced via a formaldehyde-free bio-fermentation process. Unlike conventional glycolic acid derived from petrochemicals such as formaldehyde or monochloroacetic acid, Purolic reportedly delivers high purity and reduced irritation, making it an ideal drop-in replacement for formulators seeking cleaner, safer alternatives.

While bio-fermentation has historically lagged petrochemical methods in scale, Phycus' production capabilities are positioned to meet rising demand from both small indie brands and major U.S. retailers, offering a sustainable, high-performance ingredient for the fast-growing natural and masstige skin care segments. As American consumers increasingly prioritize clean, effective, and eco-conscious formulations, Purolic says it positions brands to meet this demand without compromising on performance or safety.

"Traceability is a crucial factor for brands when selecting ingredient sources," says A. Vikram Pandit, Ph.D CEO and co-founder of Phycus Biotechnologies. "At Phycus, we rigorously evaluate our suppliers' manufacturing processes and raw materials to ensure they are sustainably sourced. Certifications such as FSC, PEFC, and ISCC Plus play a vital role in verifying the origin of these raw materials. These certifications assure our customers that Purolic is made entirely from 100% traceable, upcycled, plant-based materials, and that it meets stringent third-party verification standards."

Pandit continues, "Additionally, we validate our end products through independent studies. Using carbon-14 techniques, we certify the proportion of bio-based content, preventing the mislabeling of petrochemical-derived products as 'natural' or 'plant-derived.' Purolic is a USDA Certified Biobased Product, independently verified by a third-party laboratory following the ASTM D6866 standard."

Many formulators are cautious about ingredient consistency when switching to bio-based alternatives.



Global Cosmetic Industry asked Pandit what steps were taken to ensure Purolic Acid maintains the same—or better—performance characteristics as conventional glycolic acid.

"We have conducted many tests to ensure Purolic is just as efficient and effective [as conventional grades]," says the executive. "FTIR scans confirm that, molecularly, Purolic is identical to petrochemical derived glycolic acid. Additional studies, such as MTT assays confirm that it exfoliate similarly to petrochemical glycolic acid. Together, these tests validate that glycolic acid is a drop-in replacement in formulations, making the process to switch to a natural source easy and straightforward."

Phycus claims that Purolic causes less irritation than conventional glycolic acid because it is produced through microbial fermentation, avoiding impurities introduced by traditional methods using formaldehyde or monochloroacetic acid. IL-1a studies support this claim, per the company, highlighting the benefits of their purer, natural process.

Purolic uses upcycled plant materials instead of fossil fuels to create a sustainable carbon cycle that naturally absorbs and releases CO_2, according to the company. This approach reportedly significantly reduces the environmental impact by introducing less new carbon into the atmosphere. Purolic estimates that this process can lower greenhouse gas emissions by up to 50% compared to conventional petrochemical manufacturing.

"This represents a significant advancement for the beauty and personal care industry in its efforts to reduce its overall carbon footprint," says Pandit. "Additionally, it demonstrates that new and innovative technologies can produce essential molecules in our industry while making them more environmentally friendly."



Phycus Biotechnologies is shaking up the U.S. skin care industry with Purolic Acid, a 100% biobased glycolic acid produced via a formaldehyde-free bio-fermentation process.

A Next-Gen Biofunctional Active with Unique Nanostructure

Ultra Chemical's Bicoalgae Blue is a biofunctional ingredient developed by Bicosome that features a specialized nanostructure system. The ingredient reportedly delivers actives deep into the epidermis and dermis, targeting senescent cells that contribute to visible signs of aging.

The ingredient combines blue microalgae (*Spirulina platensis*) to stimulate keratinocyte and fibroblast proliferation with resveratrol, a polyphenol known for its anti-inflammatory and mitochondrial-boosting properties. Clinical data purportedly shows enhanced cell proliferation, increased ATP production, improved wound healing, and measurable gains in skin hydration and elasticity, making it ideal for rejuvenating both young and aging skin. Globally compliant—including in China—Bicoalgae Blue can be used at 1–3% in skin and color cosmetic formulations.

Image by RDNE Stock at Adobe Stock

A Sustainable, High-Performance Ceramide

TRI-K has introduced TerraCera Renew NP, a precision bio-fermented ceramide designed to restore and enhance the skin's barrier while delivering superior moisturization. Clinically tested to reduce trans-epidermal water loss (TEWL) and outperform market benchmarks, TerraCera Renew NP reportedly combines bio-identical lipid technology with high-purity fermentation to ensure optimal dermal integration and bioavailability.

Boasting certifications including COSMOS, ECOCERT, NATRUE, vegan and gluten-free, the ingredient is able to strengthen the skin barrier, boost hydration and support natural skin resilience. This positions TerraCera Renew NP as a versatile solution for moisturizers, serums and barrier-repair products. ■



Ultra Chemical's Bicoalgae Blue is a biofunctional ingredient developed by Bicosome that features a specialized nanostructure system. The ingredient reportedly delivers actives deep into the epidermis and dermis, targeting senescent cells that contribute to visible signs of aging.



Image by Alena Darmel at Pexels



THE K-SHAPED SKIN CARE MARKET PLAYBOOK

In the United States, the skin care market is being reshaped by a powerful middle ground: masstige skin care. Positioned between mass and prestige, masstige brands[a] are now dominating the U.S. skin care segment, per Circana data—outperforming both entry-level and luxury players as consumers recalibrate their spending in a K-shaped economy[b]. As inflation fatigue, selective splurging and value-conscious upgrading converge, American beauty shoppers are no longer trading strictly up or down. Instead, they are trading across—seeking clinically credible formulations, elevated branding and attainable price points that feel like smart investments rather than indulgences.

This shift signals more than a temporary pricing preference. It reflects new market dynamics in the U.S. beauty industry, where growth is increasingly concentrated in brands that can straddle efficacy, accessibility and aspiration. From dermatologist-inspired lines gaining traction at national retailers to digitally native brands redefining "affordable luxury," masstige skin care is emerging as the strategic sweet spot. For brands operating at every tier—from mass to prestige—the rise of masstige offers critical lessons on pricing architecture, innovation cadence, claims substantiation and consumer messaging in a polarized economy.

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[a]www.circana.com/post/us-beauty-industry-sales-accelerate-in-q3-circana-reports

[b]*A K-shaped economy describes an economic recovery in which different segments diverge sharply—higher-income consumers and premium categories continue to grow, while lower-income consumers and value segments struggle, creating uneven outcomes across markets and industries.*

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DUA, a skin care line created by Dua Lipa and Augustinus Bader Science, targets consumers on the upward arm of the K, particularly those who continue to invest in high-performance, science-led skin care as a form of long-term self-maintenance rather than discretionary luxury.

Courtesy of BTS by Morgan Maher for DUA



In this report, *Global Cosmetic Industry* explores how masstige skin care came to dominate the U.S. market, what it reveals about evolving consumer behavior, and how beauty brands can pivot to capture growth in a K-shaped economy—whether by moving up, moving down or strategically meeting consumers where they now feel most comfortable spending.

Masstige Brands Drive Growth in a K-Shaped Economy

In the first nine months of 2025, U.S. prestige skin care sales rose a modest 1% year-over-year to reach $6.7 billion, per Circana, with unit sales outpacing dollar growth—an indication of heightened promotional activity and more cautious premium spending. By comparison, mass skin care posted stronger gains, growing 5% during the same period, supported by continued demand for core daily use products.

Within the prestige category, facial skin care—the largest segment in the U.S. market—saw incremental growth, driven primarily by e-commerce, as consumers increasingly turn online for replenishment and product discovery. Body care and sun care emerged as the fastest-growing skin care segments. In mass retail, face serums and facial moisturizers ranked among the fastest-growing product categories, reflecting sustained interest in results-oriented, accessible solutions.

As inflation fatigue, selective splurging and value-conscious upgrading converge, American beauty shoppers are no longer trading strictly up or down. Instead, they are trading across—seeking clinically credible formulations, elevated branding and attainable price points that feel like smart investments rather than indulgences.



In the first nine months of 2025, U.S. prestige skin care sales rose a modest 1% year-over-year to reach $6.7 billion, per Circana, with unit sales outpacing dollar growth—an indication of heightened promotional activity and more cautious premium spending.

Against this backdrop, masstige skin care brands continue to outperform both mass and prestige, posting 14% nine-month growth through September 2025. The ability to balance perceived efficacy, elevated branding and attainable price points positions masstige to compete and win in an increasingly K-shaped beauty economy.

The Brands Positioned to Thrive in a K-shaped Economy

YSE Beauty fits squarely into the K-shaped economic reality by serving a financially resilient, results-driven consumer who is still willing to spend on skin care—but selectively. Positioned in Sephora at accessible-prestige price points, the brand delivers clinical credibility, multifunctional products and simplified routines that appeal to Gen X women seeking value defined by performance rather than indulgence.

From top: images by m-art; wedmoments.stock at Adobe Stock

Its strong DTC momentum, rapid retail expansion and triple-digit growth demonstrate how masstige and accessible-prestige brands on the "upward" arm of the K are capturing share by meeting consumers who are trading smarter, not necessarily trading down. As a result, YSE is forecasting nearly $30 million in revenue in 2026.

It's no surprise, then, that in December 2025 YSE closed a $15 million Series A funding round led by Silas Capital, with participation from L Catterton and existing investors Willow Growth Partners and Halogen Ventures.

"Molly's approachable, yet authoritative voice has been a key driver in building the loyal and engaged community supporting the incredible momentum for YSE Beauty," said Brian Thorne, partner at Silas Capital. "Leveraging her insider network of dermatologists, estheticians and makeup artists, she has curated a lineup of multi-functional skin care-meets-makeup essentials that cater to an underserved Gen X customer that demands results-driven beauty. We're thrilled to partner with Molly for this next chapter, supporting both the brand's impressive e-commerce momentum, as well as its quickly scaling wholesale expansion with Sephora."

DUA, a skin care line created by Dua Lipa and Augustinus Bader Science, also targets consumers on the upward arm of the K, particularly those who continue to invest in high-performance, science-led skin care as a form of long-term self-maintenance rather than discretionary luxury. Priced in the accessible-to-upper prestige range and built on Augustinus Bader's proprietary TFC5 technology, the brand offers clinical credibility, preventative positioning and routine simplification, appealing to shoppers who are consolidating routines but not compromising on efficacy. DUA demonstrates how premium, celebrity-founded brands can still potentially gain traction by reframing skin care as an essential, performance-driven investment—supported by trusted science—rather than an aspirational indulgence.

REMEDY, meanwhile, fits into the K-shaped economy by capturing consumers on the "downward" arm who are trading down in price but not in standards, seeking dermatologist-backed efficacy at mass-accessible price points. With sub-$30 launches, clearly labeled solutions and simplified routines, the brand removes both financial



"There is so much synergy between our brand, the brands in the Silas portfolio and L Catterton's deep strategic knowledge of the category," said YSE Beauty founder, Molly Sims, when her brand's latest funding was announced.

Courtesy of Sarah Holt for YSE

and informational barriers at a time when many shoppers are scrutinizing every purchase. Backed by Muneeb Shah, DO's social credibility and large digital audience, REMEDY demonstrates how science-forward, expert-led brands can grow in a polarized economy by delivering clinical trust, visible results and affordability—proving that value, not luxury, is driving growth for a significant segment of the U.S. skin care market.

The brand recently launched its Daily Defense 15% Vitamin C Complex ($27.99) as part of a nationwide expansion at Target in the United States. Other exclusives at the retailer include the Remedy Hand& Cuticle Repairing Butter Cream with Retinol ($17.99) and Remedy Derm Dissolve Cleansing Balm ($17.99), as well as a Morning Protocol Bundle ($19.99) featuring the Daily Defense Serum, Cream-to-Foam Cleanser and Rich Cream Moisturizer.

At Target, REMEDY's strategy centers on leveraging national scale to lower, rather than raise, prices, reportedly using Target's margin structure to expand access to dermatologist-developed skin care without sacrificing efficacy or transparency. By maintaining clear, concern-led labeling and simplified routines while avoiding the premium markups typically associated with mass retail expansion, REMEDY is seeking to reinforce its challenger positioning and strengthen consumer trust. The approach reflects a deliberate focus on affordability, clarity and clinical credibility as core growth drivers in today's polarized beauty market.



REMEDY fits into the K-shaped economy by capturing consumers on the "downward" arm who are trading down in price but not in standards, seeking dermatologist-backed efficacy at mass-accessible price points.

Courtesy of REMEDY

5 Keys to the K-shaped Skin Care Market

1. **Position for the middle ground:** Masstige brands are dominating growth by balancing efficacy, branding, and attainable price points, appealing to consumers trading across rather than strictly up or down in a polarized market.
2. **Simplify routines and highlight results:** Consumers—whether on the upward or downward arm of the K—favor products that deliver visible benefits with minimal steps, emphasizing multifunctionality and clinical credibility.
3. **Leverage retail and digital channels strategically:** E-commerce remains a key growth driver, particularly for facial skin care, while selective retail expansions (like REMEDY at Target or YSE at Sephora) can amplify accessibility and brand trust.
4. **Align pricing with consumer expectations:** Brands that use scale and strategic partnerships to maintain affordability without compromising quality—like REMEDY—can capture value-conscious shoppers and reinforce loyalty in a price-sensitive environment.
5. **Target and communicate to distinct consumer segments:** Upward K consumers (e.g., DUA, YSE) respond to science-led, performance-driven messaging, while downward K consumers (e.g., REMEDY) prioritize value, transparency and expert-backed efficacy—highlighting the importance of tailored positioning and messaging in product development and marketing strategies. ■

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BIOACTIVES, DELIVERY SYSTEMS AND SUSTAINABLE INNOVATION:

WHAT'S NEXT IN BEAUTY



This report highlights notable new ingredients shaping the industry — from bioactives that mimic in-office aesthetic procedures, to stress-fighting and neurobeauty compounds, to high-load delivery systems and sustainable botanicals.

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BY **JEB GLEASON-ALLURED**, *Global Cosmetic Industry*
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The latest wave of beauty innovation is moving beyond surface-level solutions, tapping into biology, biotechnology and advanced delivery systems to address aging, stress and skin sensitivity at the cellular level. This report highlights notable new ingredients shaping the industry — from bioactives that mimic in-office aesthetic procedures, to stress-fighting and neurobeauty compounds, to high-load delivery systems and sustainable botanicals. Each represents a strategic opportunity for brands to combine efficacy, consumer appeal and sustainability, meeting growing demand for science-driven, high-performance and environmentally conscious formulations.

Targeting Skin Aging at the Biological Level: Next-Generation Actives and Delivery Technologies

A New Bioactive Targeting Pathways Used in Energy-Based Skin Tightening Treatments

Debut has launched DermCeutical EDL, a topical bioactive ingredient developed using AI, skin genomics and biotechnology that is clinically



DermCeutical EDL reportedly activates dermal fibroblasts to increase elastin production, a primary mechanism also pursued by energy-based treatments such as radiofrequency skin tightening, ultrasound-based lifting devices and certain laser modalities that rely on controlled dermal heating to stimulate structural protein renewal.

Image by Mihail at Adobe Stock

shown to tighten and firm skin by activating biological pathways commonly targeted in in-office aesthetic procedures. According to the company, the ingredient is designed to mimic the cellular effects of noninvasive and minimally invasive skin tightening treatments rather than injectable volumization or resurfacing procedures.

DermCeutical EDL reportedly activates dermal fibroblasts to increase elastin production, a primary mechanism also pursued by energy-based treatments such as radiofrequency skin tightening, ultrasound-based lifting devices and certain laser modalities that rely on controlled dermal heating to stimulate structural protein renewal. By boosting elastin synthesis and supporting dermal matrix integrity, the ingredient aligns with the same biological objective of these procedures: improved firmness, reduced laxity and gradual lifting without altering facial volume.

The ingredient also downregulates stress-related proteins and reverses adverse gene expression linked to aging skin. This mirrors outcomes associated with regenerative aesthetic treatments such as microneedling and fractional energy devices that aim to reset cellular stress responses and promote healthier gene signaling as part of collagen and elastin remodeling. Debut reports that DermCeutical EDL promotes long-term dermal integrity by addressing these pathways topically rather than through controlled injury or thermal stimulation.

In a 12-week clinical study, dermatologist-blinded assessments showed a 73% improvement in skin sagging and a 100% fine-line improvement rate compared to placebo. Elastin production increased six-fold and aged cell rejuvenation improved by 31%. These outcomes correspond to benchmarks often used to evaluate skin tightening technologies in clinical settings, including improvements in laxity, fine lines texture and overall firmness across the face jawline and neck.

Debut positions DermCeutical EDL as relevant amid rising demand for skin tightening driven by increased use of GLP-1 medications associated with rapid weight loss and skin laxity, as well as consumer interest in non-volumizing aesthetic results. The ingredient expands Debut's portfolio of biotech actives intended to translate the biological targets of professional aesthetic treatments into topical formulations suitable for consumer skin care products.

A Stress-Fighting Biotech Breakthrough for Ageless Skin

Lubrizol recently highlighted new findings confirming the efficacy of its Telophi biotech ingredient. The ingredient helps to protect against aging and stress, resulting in improved extracellular matrix balance and the preservation of collagen, the company reports.

Previously, Telophi (INCI: Glycerin (and) Water (*Aqua*) (and) *Bacillus* Ferment) was shown in vitro to shield telocytes, stem cells and exosomes against psychological and cellular stress.

The new in vitro, ex vivo and in vivo work confirmed previous findings and highlighted the ingredient's ability to support full-spectrum collagen care.

The ingredient promoted extracellular matrix homeostasis and preserved collagen integrity. It also contributed to a firmer, lifted and more harmonious facial contour, with proportions approaching the Golden Ratio (Phi).

Telophi is derived from a rare *Bacillus* species discovered exclusively in the Florida Keys, Lubrizol reports. The ingredient features a profile of more than 20 peptides — including 15 cyclopeptides — and 15 fatty acid derivatives, delivering advanced anti-aging and regenerative properties.

This active profile finds applications in:

- Anti-aging
- Facial lifting
- Firming and restructuring
- Increasing skin radiance



Lubrizol recently highlighted new findings confirming the efficacy of its Telophi biotech ingredient, which helps to protect against aging and stress, resulting in improved extracellular matrix balance and the preservation of collagen, the company reports.

Courtesy of Lubrizol

At a recommended use level of 2%, the product is reportedly easy to incorporate into skin care routines.

Telophi boasts 100% natural origin content (ISO 16128), COSMOS approval, and compliance with global standards including China CFDA. In addition, Lubrizol supports the Coral Restoration Foundation, marking its commitment to sustainability and environmental restoration.

New 'Neurobeauty' Benefits for a Sensitive Skin Ingredient

Croda Beauty has uncovered new benefits for its SphingoCare DS-CERAmix-V ingredient[a], a bio-designed, skin-inspired liquid crystal lamellar system developed to support sensitive skin.

Beyond the ingredient's positive preclinical results, new studies reveal its barrier-reinforcing and hydrating effects, as well as improvements in skin texture, elasticity and sensory properties.

More specifically, clinical studies highlight the following benefits, per the company.

- *Skin texture:* A 28-day study showed an up to 24% reduction in skin roughness, visibly improving texture compared to the placebo.
- *Elasticity:* Elasticity increased by 38.8% after five days of use.
- *Hydration:* Hydration levels in sensitive skin improved by 57.3% compared to the baseline.
- *Comfort:* Itching scores were reduced by 81%, providing rapid relief for irritated skin.

Croda Beauty adds that "neurobeauty" testing using EEG has demonstrated that despite having a texture similar to a placebo cream, a cream containing the DS-CERAmix-V shifted users' emotional responses toward greater relaxation and comfort during application.

As the company explains, the ingredient was designed to deliver essential stratum corneum lipids, including an optimized 2:1:1 ratio of ceramide NP, ceramide AP and phytosphingosine, closely mimicking the skin's natural composition. This structure strengthens the skin's barrier and enhances its moisture-retaining properties.

Beyond efficacy, the ingredient is RSPO-certified, vegan-suitable and IECIC-compliant, offering a science-based solution for barrier care and sensitive skin formulations.



Croda Beauty has uncovered new benefits for its SphingoCare DS-CERAmix-V ingredient, including improvements in skin texture, elasticity and sensory properties.

High-Load Delivery for Deeper Skin Penetration and Lasting Efficacy

Labio has launched its patented MIT[HD] technology, a delivery system aiming to redefine active ingredient efficacy in skin care. This innovation uses a multi-lamellar vesicle (MLV) structure to deliver high concentrations of active ingredients deeply into the skin — stably and with good performance, per the company.

The core of MIT[HD] technology is its structure, which combines mannosyl erythritol lipid (MEL) derived from *Pseudozyma* sp. SY16 with phospholipids.

According to Labio, this combination forms stable, multi-layered vesicles that mimic the skin's own structure, enhancing biocompatibility.

The ingredient's design enables it to carry high loads of both oil-soluble and water-soluble active ingredients, ensuring they reach their target within the skin for maximum impact. According to the company, the technology facilitates a multi-infusion mechanism for deeper penetration

[a]*DS-CERAmix-V INCI: Water (*Aqua*), Hydrogenated Polydecene, Glycerin, Glyceryl Stearate, Cetearyl Alcohol, 1,2-Hexanediol, Hydrogenated Lecithin, Ceramide NP, Cholesterol, Stearic Acid, Ceramide AP, Phytosphingosine, Tetraacetylphytosphingosine, Xanthan Gum, Ceramide EOP, Glycosphingolipids*

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and prolonged release, enhancing absorption and extending the efficacy of skin care formulations.

A key benefit of the MIT[HD] system is reportedly its exceptional stability. The MEL tri-acyl components act as cross-linkers between the vesicle layers, creating a robust and resilient structure that protects the potency of the active ingredients. This ensures the formulation remains effective from production to application.

Furthermore, LABIO has prioritized sustainability in the development of this technology: the MEL is derived from a natural fermentation process, and the entire system is produced using a low-energy cold process.

This commitment to environmentally friendly practices positions the MIT[HD] technology as high-performing, sustainable innovation.



Labio has launched its patented MIT[HD] technology, which uses a multi-lamellar vesicle (MLV) structure to deliver high concentrations of active ingredients deeply into the skin.

High-Performance Zinc Sun Protection Without the White Cast

Azafran Innovación recently launched its Azafran BioSheer Zinc Dispersion, a blend featuring uncoated zinc oxide (ZnO) and designed for maximum transparency and robust broad-spectrum UVA/UVB protection. According to the company, the dispersion meets and exceeds international standards for sun protection, offering consistent coverage across the UV spectrum.

Azafran BioSheer Zinc Dispersion (INCI: Zinc Oxide (and) Caprylic/Capric Triglyceride (and) Polyhydroxystearic Acid) is reportedly engineered to eliminate the whitening effect commonly associated with mineral sunscreens. It is said to provide a balanced ratio of UVA and UVB defense, making it suitable for everyday use.

Additional benefits include:

- it is designed for easy integration into various formulations and
- it complies with strict global UVA protection standards.

Also, the company highlights how Azafran BioSheer Zinc Dispersion aligns with demands for eco-consciousness and safety.

- *Clinically proven safety:* Studies led by Australian universities have confirmed that zinc oxide nanoparticles do not cause cellular toxicity, even with repeated application.
- *Reef and marine safe:* Zinc is a necessary micronutrient in marine ecosystems, supporting surface productivity and contributing to the global carbon cycle.
- *Biodegradable:* As a naturally occurring mineral, ZnO is biodegradable and does not persist in the environment as a pollutant.



Azafran Innovación recently launched its Azafran BioSheer Zinc Dispersion, a blend featuring uncoated zinc oxide (ZnO) and designed for maximum transparency and robust broad-spectrum UVA/UVB protection.

From top: Images by Екатерина Клищевник; wavebreak3 at Adobe Stock



BotaniCellar Crithmum Maritimum, *based on the namesake extract, has been described as "the most precious skin care ingredient of the 21st century" and is a rare plant from Brittany's coast, according to Uniproma.*

Taken together, the Azafran BioSheer Zinc Dispersion is poised to revolutionize sun care, offering a balanced blend of performance, safety and sustainability, the company reports.

Engineering Sustainability: High-Performance Ingredients for a Cleaner Beauty Future

Scaling Rare Botanicals with Innovative Cell Cultivation

Uniproma aims to take sustainable skin care and wellness to the next level with its plant cell mass cultivation technology, said to make rare botanicals more accessible than ever before. Using patented single-use biodegradable reactors, the company has dramatically reduced the cost of cell culture, setting a new benchmark for sustainability and innovation, Uniproma reports.

This approach democratizes access to premium ingredients while also aligning with eco-conscious practices. In addition, the company claims to have the world's largest botanical cell bank and a fast-track, customized ingredient service to deliver high-quality botanicals that redefine skin care.

Snow lotus: Derived from the pistil and petals of *Saussurea involucrata* and found at 4,000 meters in the Tianshan Mountains, BotaniCellar Tianshan Snow Lotus (INCI: *Saussurea Involucrata Callus* Extract (and) Pentylene Glycol (and) Butylene Glycol) offers benefits for skin including:

- Reduction in melanin production
- Enhanced radiance and brighter skin tone
- Improvement in inflammatory hyperpigmentation

The ingredient acts by inhibiting tyrosinase activity and minimizing free radical damage to restore the skin's natural glow.

Desert rose: Extracted from *Adenium obesum*, a resilient plant thriving in Kenya's arid environment, BotaniCellar Desert Rose (INCI: *Adenium Obesum* Leaf Cell Extract (and) Pentylene Glycol (and) Butylene Glycol) provides skin:

- Relief from inflammatory aging
- Antioxidant properties to alleviate oxidative stress
- Intense hydration and enhanced skin elasticity

Its active cells are also reported to improve dermal structure, boost skin firmness and promote deep hydration.

Image by varbenov at Adobe Stock

Crithmum maritimum: BotaniCellar *Crithmum Maritimum* (INCI: *Crithmum Maritimum Callus* Extract (and) Pentylene Glycol (and) Butylene Glycol), has been described as "the most precious skin care ingredient of the 21st century," according to the company. This rare plant from Brittany's coast offers:

- Whitening and brightening effects
- Soothing for sensitive skin
- Strengthened skin structure and improved barrier function

Its core component, chlorogenic acid, is said to provide antibacterial, anti-inflammatory and antioxidant benefits, promoting a healthy glow and robust skin.

Edelweiss: Derived from *Leontopodium alpinum*, a plant thriving in the harsh Alpine environment, BotaniCellar Edelweiss (INCI: *Leontopodium Alpinum Callus* Extract (and) Pentylene Glycol (and) Butylene Glycol) is designed to deliver:

- Antibacterial properties and microbiome balance
- Protection against blue light and external aggressors
- Improved dermal structure and reduced inflammation

Chlorogenic acid, its key component, offers exceptional antioxidant and anti-aging benefits, shielding the skin from oxidative stress and environmental damage, per the company.

Eryngium maritimum: BotaniCellar *Eryngium Maritimum* (INCI: *Eryngium Maritimum Callus* Culture Extract (and) Pentylene Glycol (and) Butylene Glycol) is based on a plant from Brittany's coast, renowned as the "king of stress resistance." It is celebrated for its self-repair abilities, providing:

- Skin structure repair
- Hydration and water retention
- Relief from redness and warmth

According to the company, rosmarinic acid, the ingredient's active component, offers powerful antioxidant, anti-inflammatory and antibacterial properties, aiding in skin barrier repair and regeneration.



Curie Co. has launched AmpliPQ-CF, a modern preservation system built for clean and sustainable cosmetics and personal care formulations, including shampoos and conditioners.

Uniproma's proprietary plant cell culture technology reportedly enhances the active components of these botanicals, ensuring maximum efficacy and sustainability. By harnessing the power of nature and science, the company aims to bring luxury skin care within reach.

Sustainable Preservation: Green Tech Meets High Performance

Seqens Personal Care has added four next-generation blends to its AdvensProtect portfolio — a range of multifunctional alternatives to traditional preservatives. Developed at the U.K. manufacturing site of Chemoxy, an affiliate of the Seqens Group, this launch introduces high-purity, 100% bio-based versions to drive eco-conscious product development.

The new multifunctional ingredients provide humectant and emollient properties while ensuring excellent product protection. Per the company, they are designed to act as effective alternatives to traditional preservative systems or as boosters to reduce the concentration of active preservatives needed in cosmetic formulas.

- *AdvensProtect 56E* (INCI: Pentylene Glycol (and) 1,2-Hexanediol (and) Ethylhexylglycerin) is specifically formulated for use in sensitive skin products.
- *AdvensProtect 56E Green* is its sustainable twin, using the same blend but leveraging 100% bio-based ingredients.
- *AdvensProtect 58E* (INCI: Pentylene Glycol (and) Caprylyl Glycol (and) Ethylhexylglycerin) is suggested for formulators seeking a robust one-stop solution.

Image by sarayutsridee at Adobe Stock

- *AdvensProtect 58E Green* similarly offers the same blend but using 100% bio-based components and according to the company, it mirrors the performance of the standard version.

All the ingredients are suitable for formulations ranging from creams, lotions, shampoos, gels and foundations, to sunscreens and wet wipes; they are also suited to all skin types. In addition, they are cold-processable, clear liquids that are easy to formulate with and are temperature- and pH-independent, per the company. AdvensProtect 56E and 56E Green are recommended at 1.0-2.5% while 58E and 58E Green are suggested at 0.5-1.5%.

Seqens emphasizes that these "green" launches demonstrate its commitment to green chemistry. Notably, both AdvensProtect 56E Green and 58E Green are certified ISO 16128 Natural Derived with a Natural Origin Index (NOI) of 1.

By sourcing these ingredients sustainably, Seqens provides formulators with a clear pathway to developing high-performance, eco-friendly beauty products without compromising on quality or efficacy.

In other news, Curie Co. has launched AmpliPQ-CF, a modern preservation system built for clean and sustainable cosmetics and personal care formulations. According to the company, the ingredient boosts the efficacy of sodium benzoate to deliver robust, broad-spectrum protection while meeting clean label standards.

Brands and formulators face growing pressure to preserve beauty products with fewer, more broadly acceptable components while still delivering uncompromised microbiological protection. AmpliPQ-CF (proposed INCI: Sodium Benzoate (and) Polyamine) was built for that reality.

Based on Curie Co.'s proprietary AmpliPQ technology platform, AmpliPQ-CF is a chelator-free preservation system that combines sodium benzoate with a polyamine booster. This unique synergy is said to deliver broad-spectrum protection in formulations at or below pH 6.

According to the company, AmpliPQ-CF also serves as an effective alternative to phenoxyethanol, empowering formulators to move away from traditional preservatives while maintaining product integrity.

"AmpliPQ-CF delivers the preservation simplicity brands want, while meeting modern expectations for performance and clean beauty alignment," said Erika Milczek, CEO of Curie Co.

AmpliPQ-CF is designed for versatility and ease of use in a manufacturing environment, per Curie Co. It is water-soluble, colorless and odorless in formulation, making it compatible with fragrances and dyes. This supports modern sensory expectations without complicating the development process.

In addition, the system can be used across a wide range of rinse-off and leave-on applications in pH 3-6 systems, including:

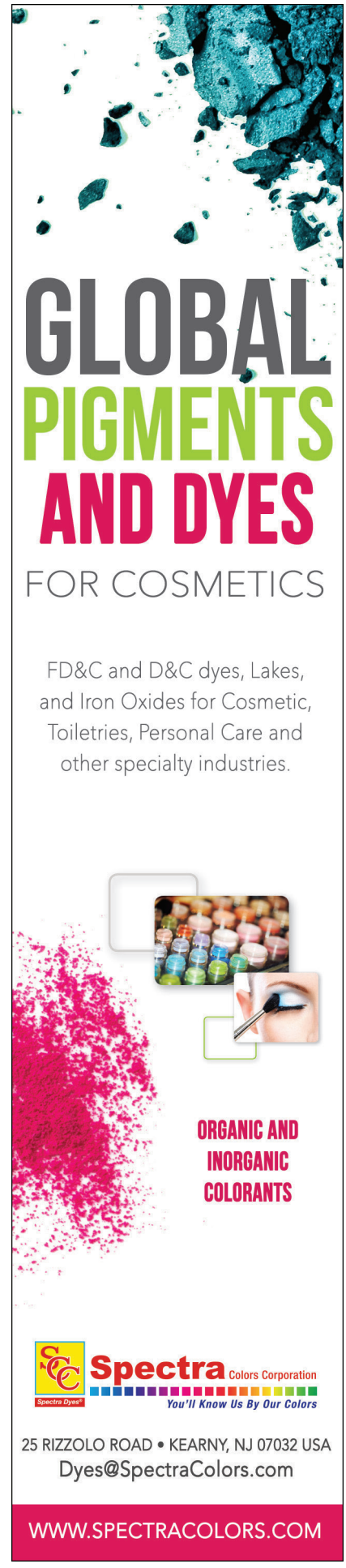
- Shampoos and conditioners
- Facial cleansers and body washes
- Skin care serums and creams

By enhancing the antimicrobial activity of sodium benzoate, AmpliPQ-CF reportedly makes high-performance preservation accessible for mass-market and prestige brands alike.

Regulatory compliance and retailer alignment are at the core of AmpliPQ-CF's development. The product is readily biodegradable and compliant with US and EU regulations, the company reports. It is also free from isothiazolinones, phenoxyethanol, parabens and formaldehyde-releasing ingredients.

Lastly, AmpliPQ-CF is designed to meet many of the most stringent clean beauty and retailer standards, including:

- Clean Beauty at Walmart
- Target Clean
- Conscious Beauty at Ulta
- Sephora ■





A wave of clinically validated ingredients point to a market shifting decisively toward performance, treatment and scalp-led solutions.

Photo by Ranjana Rajput at Unsplash

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AS THE HAIR CARE MARKET BOOMS, NEW INGREDIENTS DRIVE FRESH INNOVATION

All signs point to a market shifting toward performance, treatment and scalp-led solutions.

Hair care remains one of the most resilient and innovation-hungry categories in U.S. beauty. Recent Circana data[a] from the first nine months of 2025 and a wave of clinically validated ingredients point to a market shifting decisively toward performance, treatment and scalp-led solutions.

Market Snapshot: Hair Is a Bright Spot

U.S. Hair Care Performance (Q1–Q3 2025, Circana)

- Prestige hair: 8% growth, reaching $3.5 billion
- Mass hair care: Remains the largest category in mass beauty
- Shampoos and conditioners: Single-digit growth
- Styling and treatments: Double-digit growth

What's driving high performance

- Scalp health and repair-led positioning
- Treatment formats outperforming basic cleansing
- Consumer willingness to trade up for visible results

[a]https://www.circana.com/post/us-beauty-industry-sales-accelerate-in-q3-circana-reports

Scalp Health Moves to Center Stage

In the new era of hair care, scalp-focused products are no longer niche—they are now core growth drivers.

Consumer needs being addressed:

- Dandruff and flaking
- Dehydration and barrier disruption
- Irritation, itching and sensitivity

Strategic shift:

- Scalp care reframed as skin care, borrowing biological and clinical language
- Increased demand for gentle, physiological exfoliation rather than aggressive actives

Ingredient Innovation: What's Fueling the Next Wave?

Natural Exfoliation& Scalp Balance

Silab's Exfolactive (INCI: Hydrolyzed Opuntia Ficus Indica Flower Extract)

- Targets desquamation (shedding of dead cells), a biological mechanism shared by scalp and facial skin
- Addresses dandruff, hydration and comfort simultaneously
- Natural alternative to mechanical and chemical exfoliants
- 99%+ natural origin (ISO 16128)
- Fair-for-Life certified sourcing and global regulatory compliance

Clinical highlights:

- 74% increase in KLK-5 activity at 0.5%
- –26.1% dandruff after 5 days
- 13.8% gain in scalp hydration
- Reduced stinging and discomfort after 14 days

Implication for brands:

- Enables premium scalp care claims with strong tolerability and sustainability credentials

Advanced Delivery for Hair Loss & Regrowth

Stevioside-Based Dissolvable Microneedles (Academic Research)[b]

Breakthrough insight

- Stevioside improves minoxidil solubility 18-fold
- Enables alcohol-free delivery, reducing irritation

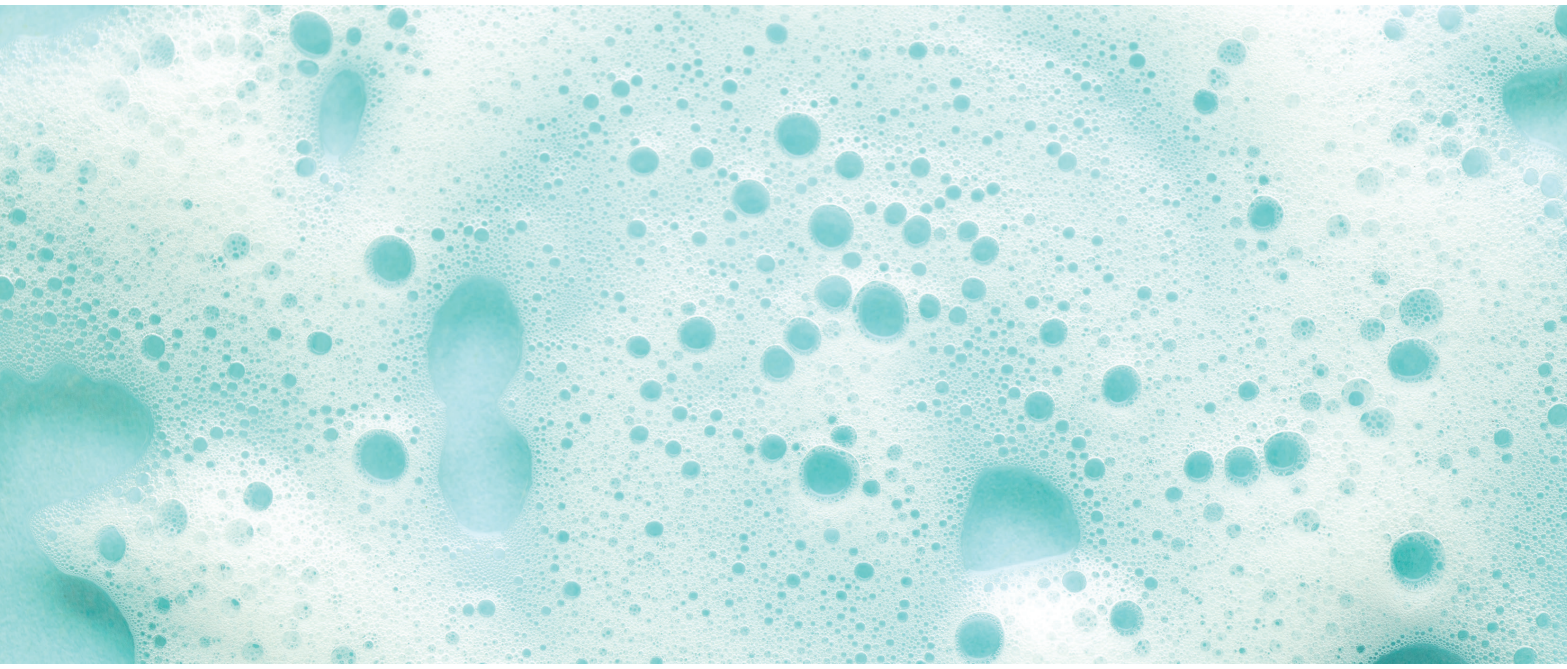
Performance data (mouse model)

- 67.5% hair regrowth in 35 days
- 85% drug release and 18% skin retention
- Outperformed 2% minoxidil solution significantly

Why R&D and marketing should care

- Signals future disruption in hair loss treatments

[b]https://advanced.onlinelibrary.wiley.com/doi/10.1002/adhm.202503575



New hair care ingredients are targeting hair fiber repair and scalp vitality, including desquamation (shedding of dead cells), a biological mechanism shared by scalp and facial skin.

- Combines minimally invasive tech and natural excipient chemistry
- Positions hair loss firmly within advanced healthcare-meets-beauty innovation

Bond Repair Goes Biotech

3DSM-Firmenich's Bond Aid with OXY 229 CB

What's new
- Patent-pending peptide complex derived from yeast biotechnology
- Targets both hair fiber repair and scalp vitality

Key performance claims
- 22% hair tensile strength increase (single use, 1%)
- 22% increase in combability
- 750% gain in scalp oxygen uptake (in vitro)
- 10% jump in cell viability (in vitro)

Why it stands out
- 700-plus peptides designed to bind keratin internally
- Effective at low concentrations
- Strong sustainability profile (biodegradable, halal, palm-oil-free)

Executive takeaway
- Reinforces the shift from cosmetic repair to structural and biological hair health

Replacing Silicones Without Sacrificing Sensory

Sonneborn (HF Sinclair)

Key launches
- SonneNatural Fluidity 40P: 100% bio-based cyclic siloxane replacements
- SonneNatural Synergy 150P: Hybrid bio-based and mineral oil system (~40% bio-based)

Why this matters
- Lower carbon footprint
- Regulatory-aligned and readily biodegradable
- Minimal reformulation required

Strategic role
- Supports sustainability goals without compromising slip, spread or feel
- Enables faster transition to renewable content across hair care portfolios

What This Means for Beauty Executives

Winning strategies
- Shift innovation dollars from basic cleansing to treatments, scalp care and repair
- Anchor claims in biological mechanisms, not just sensorial benefits
- Leverage biotech, peptides and advanced delivery as premium differentiators
- Treat sustainability as a performance amplifier, not a trade-off

Where growth is heading
- Scalp-as-skin positioning
- Hair loss and thinning solutions with clinical credibility
- Hybrid beauty-health formats
- High-performance, low-irritation actives

Hair care growth is about efficacy, biology and credibility. As styling and treatment categories outpace traditional cleansing, brands that invest in scalp science, advanced delivery systems and sustainable performance ingredients are best positioned to win the next phase of the market. ■

Image by Andrii Zastrozhnov at Adobe Stock


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Capitalizing on skinification trends, hair care brands are increasingly positioning ingredients traditionally associated with skin care as key selling points and value-added benefits.

Image by Maryia Plashchynskaya at Pexels

SCALP-FIRST: THE NEW LONGEVITY PLAY IN HAIR CARE

BY KAYLA VILLENA, Euromonitor

Over the past few years, the beauty industry has witnessed a transformative shift in hair care, moving from daily maintenance toward an embrace of holistic wellness and skinification that focuses on hair health and scalp care. What distinguishes this new wave of hair care is its foundation in the science of longevity—an approach that segments hair care into measurable domains inspired by advances in aging research and focuses on prevention, optimization and regeneration, rather than mere repair. These attributes will be pivotal in driving the projected 3% global growth of hair care in constant terms in 2026.

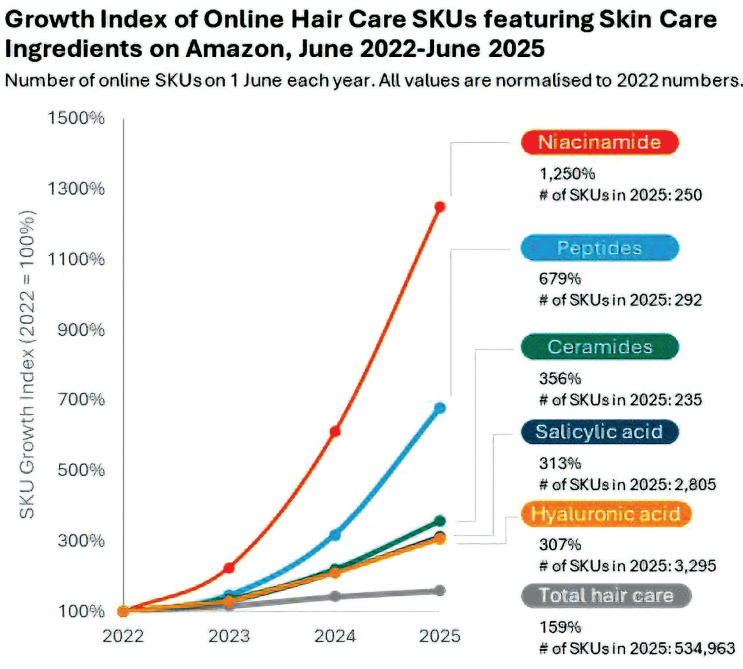
The Era of (Skin Care) Ingredient-Led Hair

Functional claims in hair care are evolving from basic cleansing and conditioning to advanced benefits, made possible by the inclusion of value-added ingredients. Capitalizing on skinification trends, hair care brands are increasingly positioning ingredients traditionally associated with skin care as key selling points and value-added benefits. Ingredients, such as hyaluronic acid, ceramides and AHAs, support scalp health and lock in nourishment for smoother, healthier hair.

Niacinamide, a form of vitamin B3, has rapidly become a star ingredient in hair care, mirroring its success in skin care. It has shown the fastest expansion since 2022, with the number of online product SKUs containing the ingredient increasing more than twelve-fold (**F-1**). Niacinamide supports enhanced blood flow to the scalp and delivers vital nutrients to hair follicles, making it an important ingredient for encouraging fuller and more rapid hair growth. It also supports keratin production, strengthens hair strands and helps the scalp retain moisture, all while reducing dryness and brittleness.

Dr.G Doopi Lab Cool Salt Scaling Shampoo from South Korea—a multifunctional shampoo that deeply cleanses the scalp and removes dead

F-1 Skin care ingredient adoption in hair care, 2022-2025



Source: Euromonitor International Via Tracking System in 32 markets

Courtesy of Euromonitor

skin cells and excess sebum—includes niacinamide, which is a key ingredient, alongside AHA, BHA and PHA, to address both scalp care and overall hair health.

Other key ingredients reshaping the hair landscape include peptides, ceramides, hyaluronic acid, and PDRN (polydeoxyribonucleotide)—an emerging ingredient used for tissue repair, inflammation reduction, and scalp aging.

Where Hair Care Meets Healthspan

Longevity is the long-term investment in future benefits, requiring consumers to practice consistent application and commitment to betterment in the present for future rewards. Longevity refers to a science-driven and lifestyle-integrated approach to extending not just lifespan, but "healthspan"—living healthier for longer.

This concept has evolved from a niche biohacking trend into a strategic business vision. Built on a preventative maintenance mindset, longevity in beauty and personal care shifts from anti-aging correction to preventive care, focusing on cellular resilience and biome protection through products like serums and ingestibles.

U.S. brand Coola plays into this niche with Coola Scalp and Hair Sunscreen Mist SPF30, which includes cica (commonly found in skin care) and monoi oil in a fine mist format to protect hair and scalp from UV exposure and color fading. Nesh, a South Korean scalp wellness brand that integrates vegan microbiome in formulations to delay scalp ageing, debuted a Soy Biome 2-Step Clinic Hair Mask that wraps around the hair for better absorption of peptides and amino acids. While the desire to prevent hair damage or breakage is not new to the hair industry by any means, this new focus on longevity has led to innovative formats in which scalp care is the focal point.



According to "Euromonitor's Voice of the Consumer: Beauty Survey 2025," consumers in their 20s and 30s prioritize prevention and entry-level longevity.

F-2 Hair concerns by age

Biggest Hair Concerns by Age Group, by Gender, 2025

Age	Gender	#1	#2	#3	#4	#5
15-29	Female	Split ends	Dandruff-prone	Frizzy	Easily tangled hair	Greasy/oily hair
	Male	Dandruff-prone	Greasy/oily hair	Itchy scalp	Hard to style hair	Dry or rough hair
30-44	Female	Split ends	Frizzy	Dandruff-prone	Greying hair	Thinning hair
	Male	Dandruff-prone	Greying hair	Itchy scalp	Thinning hair	Greasy/oily hair
45-59	Female	Greying hair	Thinning hair	Frizzy	Lack of hair volume	Split ends
	Male	Greying hair	Dandruff-prone	Thinning hair	Itchy scalp	Greasy/oily hair
60+	Female	Greying hair	Thinning hair	Lack of hair volume	Limp hair	Frizzy
	Male	Greying hair	Thinning hair	Dandruff-prone	Itchy scalp	Permanent hair loss/balding

Source: Euromonitor Voice of the Consumer: Beauty Survey, fielded June to July 2025

From top: Image by LIGHTFIELD STUDIOS at Adobe Stock; Courtesy of Euromonitor

Gen Z Pulls Hair Care Upstream

Younger consumers, who are extremely ingredient-savvy and influenced by Asian beauty rituals and TikTok routines, are driving the preventative segment of the market. According to "Euromonitor's Voice of the Consumer: Beauty Survey 2025," consumers in their 20s and 30s prioritize prevention and entry-level longevity.

Within this group, women focus more on hair smoothness and strand maintenance, while men are primarily concerned with scalp itchiness, oiliness and dandruff (**F-2**). Back-to-basics principles, like hydration, resonate with this group, linking chronic stress to long-term biological aging. This generation is driving the prejuvenation trend—taking proactive steps to prevent future aging rather than treating existing damage.

40+ Hair Enters Its Solutions Era

From age 40 onward, concerns such as scalp itchiness, stress related thinning and hair changes tied to perimenopause, menopause and even GLP 1–related hair loss become increasingly common. For these consumers, longevity shifts toward solution driven positioning and advanced interventions.

This creates potential for female focused hair loss products—a category traditionally centered on male needs. Brands like Better Not Younger, with its hydrogel hairline patches designed to boost density around the hairline and temples, illustrate the growing opportunity and innovation in this segment.



From age 40 onward, concerns such as scalp itchiness, stress related thinning and hair changes tied to perimenopause, menopause and even GLP 1–related hair loss become increasingly common.

Image by Darina Belonogova at Pexels

Skin Logic Rewrites Hair Care

According to Euromonitor's Via online SKU tracking data on Amazon, skinified hair care products saw rapid growth between 2022 and 2025, with night serums and scalp serums leading the trend (**F-3**).

A fundamental principle driving the longevity revolution in hair care is the recognition that the scalp is an extension of facial skin, and healthy hair begins with a healthy scalp. Scalp health has risen to become the third most desired hair care product functionality in 2025—up from fifth place in 2021—and sought out by 24% of hair care shoppers. This growing focus on scalp health is expected to open new segments, as seen in the increasing variety of product formats, such as scalp serums and scalp tonics.

Euromonitor's Innovation Tracker found that the most scalp care products fall under two general attribute groups, "sensitive scalp" or "scalp health." Although scalp-related claims account for 7% of hair care, they command higher price points when compared to other claims like "hydrating" and "repairing" (**F-4**).

This progression reveals a fundamental shift from cosmetic approaches that address visible hair concerns to therapeutic interventions that treat the scalp at a cellular level. The emergence of scalp-first treatments—encompassing everything from SPF protection to medicated

formulations for conditions like psoriasis—signals a broader "scalp as skin" trend that prioritizes longevity and prevention over merely cosmetic results.

The Scalp Becomes the New Battleground

Scalp-related claims register the greatest presence in conditioners and treatments, followed by standard shampoos, but there are opportunities to expand scalp-benefits in less penetrated categories, like styling agents (**F-5**). Brands and retailers, especially chemists/pharmacies and beauty specialists, can play a larger role in educating consumers about scalp care and overall hair health.

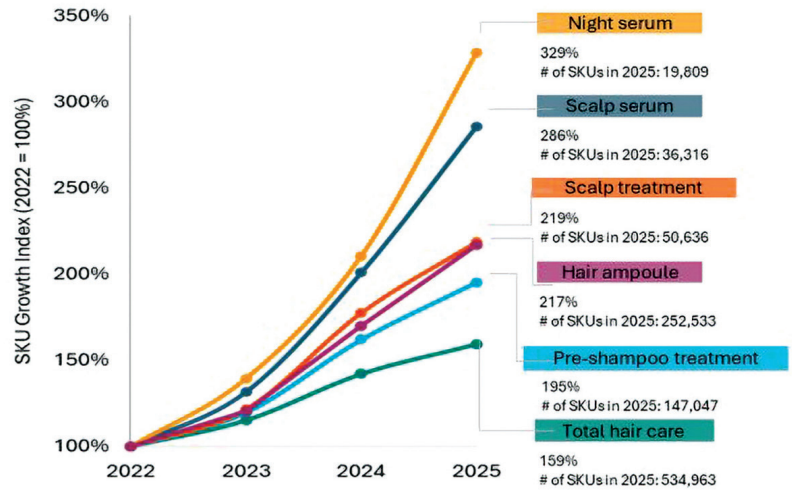
Scalp care-related claims are emerging as a key innovation focus in the premium hair care segment, with positioning expanded beyond exfoliation to include oil-moisture balance, nourishment and anti-aging benefits. For instance, Olaplex launched its Scalp Longevity Treatment in February 2025, featuring patented scalp barrier-building technology that delivers immediate hydration and soothing benefits while protecting against scalp aging to support smooth, shiny and healthy hair.

Although the brand has experienced more competition in recent years and is being considered by Henkel as a potential acquisition at the time of reporting, this launch marks a key step in Olaplex's refreshed identity and to create high-demand products that treat both the hair strands and the scalp.

Other recent launches in scalp care include a tonic in spray format for long hair (Shed Professional's Strengthening Tonic from Brazil, launched last September), a botanical-infused Ayurvedic-inspired shampoo formulated to soothe scalp irritation (Wayveda Hair Fall Control Shampoo from India, launched last June) and a pre-shampoo scalp oil from a Finnish

F-3 According to Euromonitor's Via online SKU tracking data on Amazon, skinified hair care products saw rapid growth between 2022 and 2025, with night serums and scalp serums leading the trend

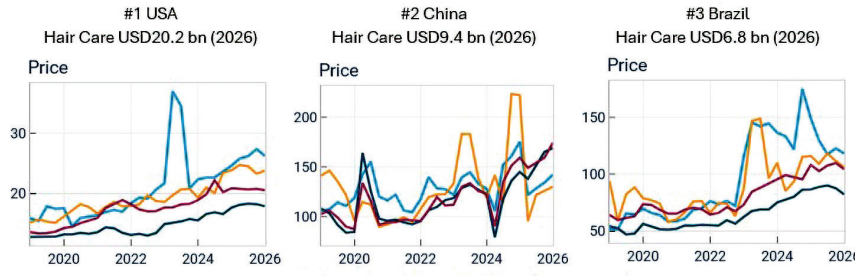
Number of online SKUs on 1 June each year. All values are normalised to 2022 numbers.



Source: Euromonitor International Via Tracking System in 32 markets

F-4 Pricing-attribute trends across markets

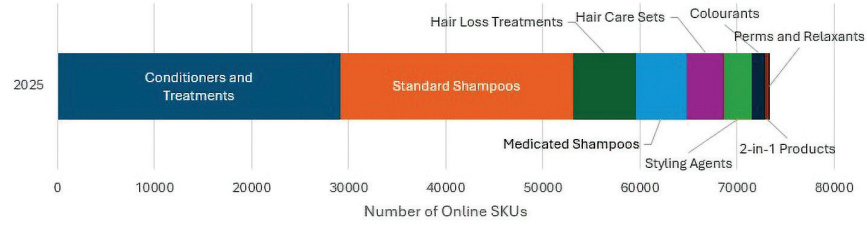
Average Price of Hair Care Attributes, January 2019 to January 2026, for the Top 3 Hair Care Markets



Source: Euromonitor International Attribute Explorer

F-5 Scalp claims by category

Scalp-related Claims in Hair Care by Category, 2025



Courtesy of Euromonitor

hair care brand that rose to popularity on TikTok (Veloide Hair ASAP Scalp Oil, launched last February in Finland and Sweden), in addition to Aveda's Scalp Solutions line.

India: Scalp Care's Top Market

India registers the most scalp-related claims in hair care in 2025. Across Indian cities, many consumers are now experiencing hair and scalp issues linked not just to hair type or styling, but to environmental factors like pollution, hard water, dust, sweat, and product layering.

Pollution and dirt accumulation are also prompting a shift in perception, with scalp care gaining equal importance to hair strand care. Brands like Minimalist, WishCare and Be Bodywise offer solution-led products backed by science and claim-based communications, often targeting Indian consumers seeking to address scalp health, hair fall and hair strengthening.

In India, hair care is no longer viewed as a one-step task, but as a system of care that blends functionality with self-care. This can be seen in urban centers, particularly tier 1 cities, where consumers are building multi-step hair care regimens that include scalp care products, as well as conditioners, treatment masks and serums.

Prevention Is the New Premium

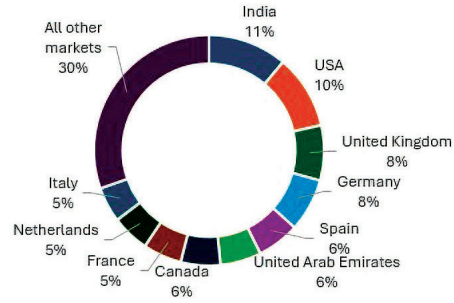
As hair care transforms into a broader wellness category, consumers are moving away from hero products and toward more prescriptive routines that support hair and scalp health on the surface and from within. Successful hair care brands in this space will instill in consumers a prevention mindset and tackle short-term health concerns with long-term habit building through the following:



Olaplex launched its Scalp Longevity Treatment in February 2025, featuring patented scalp barrier-building technology that delivers immediate hydration and soothing benefits while protecting against scalp aging to support smooth, shiny and healthy hair.

F-6 Top world markets for scalp care claims

Leading markets with Scalp-related Claims in Hair Care, 2025



Source: Euromonitor Via Pricing Online Sample, 1 Jan 2025 – 1 Jan 2026; Scalp-related claims refers to attributes "scalp health" and "sensitive scalp".

- Using ingredients and technologies that address the root causes of aging (cellular damage, inflammation, nutrient supply)
- Segmenting products by life stage and biological need, not just cosmetic effect
- Leveraging science-led claims and clinical validation to build trust and efficacy
- Innovating in delivery systems (microneedles, exosomes, AI diagnostics) for targeted, personalized care
- Expanding the narrative from "anti-aging" to "healthy aging," "prejuvenation" and "slow aging," with a focus on prevention, optimization, and regeneration

Scalp care will continue to grow as consumers shift to more holistic and personalized routines that treat the hair and scalp with the same level of care and consideration as the rest of their skin, with formulations that lay the groundwork for long-term hair health. The potential for true inside-out hair care systems that combine supplements with topical treatments will continue to represent a significant opportunity for hair care and supplement players. ■

From top: Courtesy of Olaplex; Euromonitor



Across the board, these innovations demonstrate a clear takeaway for beauty executives: today's consumers expect packaging that performs, delights, and aligns with sustainability values—making tubes, applicators and brushes not just tools, but strategic differentiators in a competitive market.

Image by Jacqy Law at Adobe Stock

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From Precision to Sustainability: How Tubes, Applicators and Brushes Are Shaping the Future of Packaging for Beauty

Today's consumers expect packaging that performs, delights, and aligns with sustainability values—making tubes, applicators and brushes not just tools, but strategic differentiators in a competitive market.

The beauty industry is entering a new era where performance, convenience and sustainability converge in every touchpoint of the consumer experience. Leading suppliers are rethinking traditional formats—from lip tubes to airless pumps, from brushes to multifunctional sticks—turning everyday beauty and personal care packaging into high-precision, aesthetically compelling tools that elevate formulas and brand perception alike.

Taiki, Viva, ICONS America, and Berlin Packaging Beauty are among the suppliers at the forefront of this shift. Precision-engineered brushes meet the demands of professional makeup artists, delivering flawless application and repeatable results. Soft lip applicator tubes and next-gen airless tubes combine mess-free precision with sustainable materials and PCR content, optimizing both user experience and supply chain resilience. Meanwhile, refillable sticks and modular systems redefine portability and circularity for skin care, hybrid and fragrance collections, proving that functional innovation can coexist with luxury aesthetics.



Taiki has unveiled its latest innovations—Precision Ferrule Edit Brushes—engineered to deliver unmatched control, accuracy and performance.



Available in heart, diamond, D-shaped, and beveled ferrule designs, the collection empowers makeup artists to master intricate details, create unique textures and achieve repeatable, flawless results across a wide range of formulas.

Across the board, these innovations demonstrate a clear takeaway for beauty executives: today's consumers expect packaging that performs, delights, and aligns with sustainability values—making tubes, applicators and brushes not just tools, but strategic differentiators in a competitive market.

Brushes for Next-Level Makeup Application

Taiki has unveiled its latest innovations—Precision Ferrule Edit Brushes—engineered to deliver unmatched control, accuracy and performance. Designed for beauty brands and professionals seeking

Images courtesy of Taiki

high-precision application, these brushes leverage advanced ferrule engineering to shape fiber density and distribution, directly influencing stroke width, product payoff and blending precision.

Available in heart, diamond, D-shaped, and beveled ferrule designs, the collection empowers makeup artists to master intricate details, create unique textures and achieve repeatable, flawless results across a wide range of formulas. Crafted with densely packed, cruelty-free synthetic fibers, the brushes combine professional-grade performance with modern ethical standards. With a legacy of innovation, Taiki also offers custom brush development for brands seeking specialized application tools.

- **Takeaway:** the Precision Ferrule Edit Brushes represent a strategic opportunity to elevate product offerings, meet growing consumer demands for high-performance tools, and differentiate in a competitive market.



Viva has introduced its latest innovation for lip care and treatment formulas—the Soft Lip Applicator Tube (D19)—combining mess-free, precise application with a sustainable, supply-resilient design.

Soft Lip Applicator Tube: Precision, Performance, and Sustainability

Viva has introduced its latest innovation for lip care and treatment formulas—the Soft Lip Applicator Tube (D19)—combining mess-free, precise application with a sustainable, supply-resilient design. Available in 60–90 mm heights (10–17 ml), the tube features a clear, ultra-soft TPE applicator that glides smoothly for comfortable, controlled lip coverage, per the company.

Viva's designs focus on standout shelf appeal and offers full in-house decoration including high-definition 360° in-mold labeling, soft-touch finishes, metallics and water-transfer options on the overcap—shortening lead times and elevating brand presence. Produced domestically with up to 60% PCR content, the compact format delivers responsible manufacturing and improved supply chain reliability.

- **Takeaway:** Viva's Soft Lip Applicator Tube is engineered for premium user experience, sustainable impact and accelerated go-to-market timelines, making it an ideal choice for lip treatments and care collections in a competitive market.

Next-Gen Tubes and Sticks

"Innovative applicators are having a major moment in beauty—and tubes and sticks are leading the way," says



ICONS America has introduced what it calls a next-generation tube solution designed for brands that demand dosage control, versatility, convenience and sustainability. The tubes feature metal-free airless pumps, offering precise product delivery while eliminating the need for metal components.



"At ICONS America, our latest PET chubby click pen is equipped with a built-in, soft, flat brush, delivering even coverage and hands-free blendability," says Marianna Cilauro, vice president of sales and marketing, ICONS America.



"Our Mix & Match collection of duo-end pansticks, bottles and tubes featuring built-in sponge or brush applicators are game changers in versatility and sustainability," says Marianna Cilauro, vice president of sales and marketing, ICONS America.

From top, L to R: Courtesy of Viva; ICONS AMERICA; ICONS America; ICONS AMERICA



"ICONS America's in-mold label (IML) technology provides this to brands by delivering clean, detailed 360° graphics and luxury, multi-finish capabilities from shoulder to crimp," says Marianna Cilauro, vice president of sales and marketing, ICONS America.



The Future.Fill connector system makes refill seamless, enabling rigid containers to pair with flexible refill pouches, per Berlin Packaging.

Marianna Cilauro, vice president of sales and marketing, ICONS America.

ICONS America has introduced what it calls a next-generation tube solution designed for brands that demand dosage control, versatility, convenience and sustainability. The tubes feature metal-free airless pumps, offering precise product delivery while eliminating the need for metal components.

Available in D25 and D30 sizes with multiple actuator styles, these tubes can be customized with PCR content, providing brands a responsible packaging option without compromising on performance or aesthetics, per the company. The design supports a broad range of formulations—from skin care treatments to specialty serums—ensuring consistent, controlled application for end consumers.

This is far from the company's only offerings.

"At ICONS America, our latest PET chubby click pen is equipped with a built-in, soft, flat brush, delivering even coverage and hands-free blendability," says Cilauro. "Featuring a 10 ml fill and a sleek flush-fit, non-retractable design, it delivers a smooth, controlled dose with every twist. Perfect for high-performance skin care and complexion formulas—from luminous foundations to targeted treatments—this travel-friendly stick offers effortless, single-handed application."

In addition, says Cilauro, "Our Mix& Match collection of duo-end pansticks, bottles and tubes featuring built-in sponge or brush applicators are game changers in versatility and sustainability. With interchangeable, removable and washable brush and sponge applicator components, these packs deliver hygienic, mix and match multifunctionality for a wide range of color and skin care formulations. Designed for ultimate convenience, this collection is beauty innovation at its most adaptable."

Finally, she says, "Consumers are looking for packaging that creates an immersive beauty experience and distinctive graphics can shape consumers' perception the moment the product is seen. ICONS America's in-mold label (IML) technology provides this to brands by delivering clean, detailed 360° graphics and luxury, multi-finish capabilities from shoulder to crimp."

- **Key takeaway:** These solutions deliver precise dosage, single-handed application, and sustainable options (PCR-ready, washable components) while supporting a wide range of skin care and color formulas. Combined with 360° in-mold labeling for luxury shelf impact, brands can now offer high-performance, convenient, and visually distinctive products that meet growing consumer demand for innovation and sustainability.

Sustainable& Innovative Packaging Solutions for Modern Brands

Berlin Packaging Beauty has unveiled a curated portfolio of packaging solutions highlighting design, sustainability and functionality for modern beauty brands. Following the acquisition of Cosmei, the group has boosted its premium makeup offerings and highlights how luxury and refillable innovation intersect across fragrance, skin care and hybrid formulations.

StickLab for On-the-Go Beauty

StickLab comprises compact, versatile stick packaging for makeup, skin care, and hybrid formulas, featuring refillable and mono-material options. Ergonomic and

From top: Courtesy of ICONS America; Berlin Packaging;

style-conscious, the collection is designed for today's dynamic, nomadic consumer, holding blush, highlighter, balm, sun care and targeted treatments.

Fragrance and Iconic Collections Reimagined

Berlin Packaging Beauty has revealed refreshed fragrance bottles, combining iconic shapes with contemporary palettes, striking decorative finishes and sustainable materials. Highlights include the minimalist Hollywood cylinder, the Herve square bottle with new PP and PETG bath and body formats, and Kopoy resin caps with lava-like textures—delivering quiet luxury and modern refinement.

Future.Fill: A Refill Revolution

The Future.Fill connector system makes refill seamless, enabling rigid containers to pair with flexible refill pouches, per Berlin Packaging. Brands can reduce material usage, optimize logistics, and offer a user-friendly circular experience without compromising on design or functionality.

Expanded Personal Care Formats

The Pockii line has grown with new 150 ml and 300 ml PET bottles, including 100% PCR options, while the AirLight Refill& Go introduces modular, compact airless solutions for travel, subscription and gift sets. Aux Collection, designed by Studio One Eleven, bridges personal and home care with coordinated bottles and refillable pouches for efficient, aesthetic and sustainable beauty experiences.



Berlin Packaging's AirLight Refill & Go introduces modular, compact airless solutions for travel, subscription and gift sets.

- **Beauty exec takeaway:** Berlin Packaging Beauty demonstrates how premium aesthetics, sustainable refillability, and functional innovation can drive modern brand differentiation across fragrance, skin care, and makeup categories. ■



Courtesy of Berlin Packaging

















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