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The Beauty Innovator's Resource

JULY/AUGUST 2026



Beyond Wrinkles:
The Ingredients Rewriting Beauty's Biological Playbook

Packaging Look Book:
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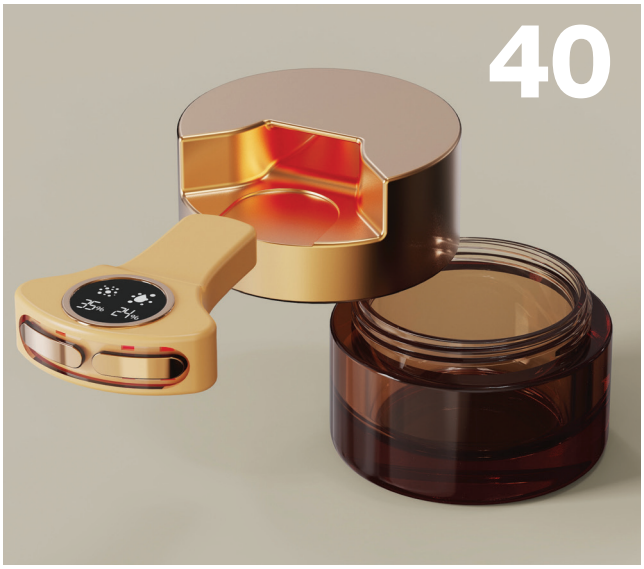
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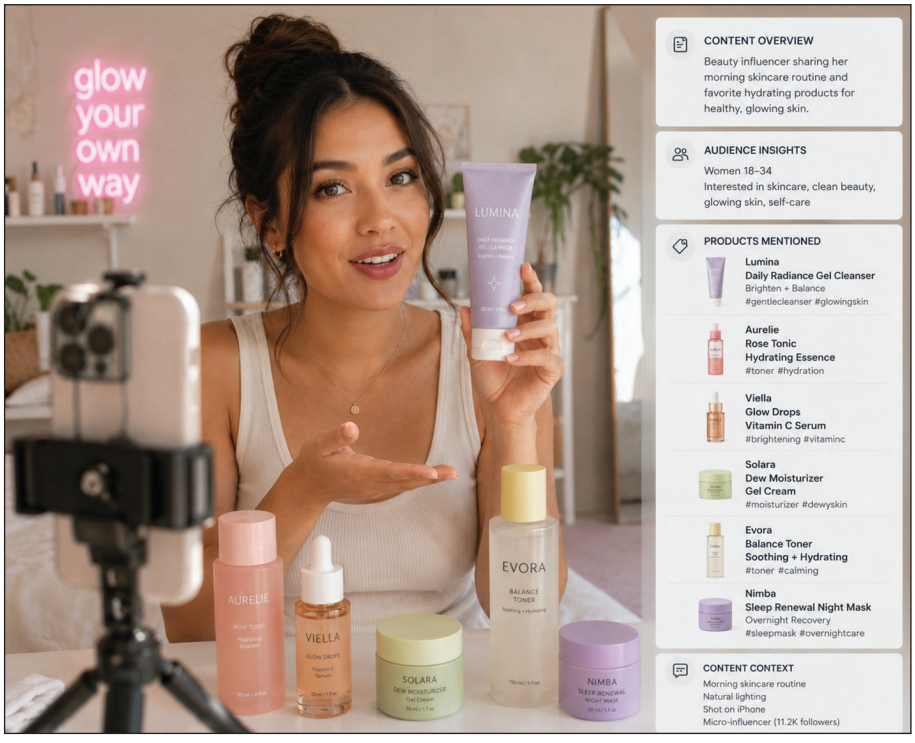
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AI Search Is Rewriting Influencer Marketing. Beauty Brands Are Racing to Feed the Machines.

"[H]undreds of highly relevant creators can create repeated, specific associations around a product across TikTok, Instagram, YouTube and search-indexed content."



"The smartest beauty brands are no longer briefing creators only for engagement," says Kristen Wiley, founder and CEO at Statusphere. "They are briefing them for discoverability." (Image, not coincidentally, generated by ChatGPT.)

Micro-influencer content is rapidly evolving from an awareness tactic into a critical discovery asset as AI-powered answer engines reshape how consumers find products. New data from influencer marketing platform Statusphere shows enterprise brands increased social SEO-focused creator campaigns by 153% in 2025, reflecting a growing recognition that content created by influencers is increasingly being surfaced by AI tools such as ChatGPT, Claude, Gemini and Perplexity.

"The smartest beauty brands are no longer briefing creators only for engagement," says Kristen Wiley, founder and CEO at Statusphere. "They are briefing them for discoverability."

Wiley continues, "That means thinking about the exact questions a consumer may ask ChatGPT, Gemini, Claude, TikTok or Google when looking for a product, whether that is 'best mascara for sensitive eyes,' or 'clean foundation with



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buildable coverage,' and then designing creator briefs that help the brand show up in those moments."

She notes, "Our data shows enterprise brands ran 153% more social SEO-focused creator campaigns in 2025 than in 2024, which signals a clear shift in how brands are thinking about creator content. A creator post is no longer just a short-term awareness asset. It is becoming part of a brand's long-term discovery infrastructure."

Finally, Wiley says, "Engagement still matters, but it is no longer the only measure of success. Increasingly, brands are asking: did this content create the right associations, around the right keywords, with the right consumers, in the places where people and AI systems are discovering products?"

For beauty marketers, the implications are significant. As AI-driven discovery begins to siphon traffic from traditional search engines, creator content optimized around product keywords, reviews, tutorials and comparisons is becoming part of the infrastructure that powers product recommendations. Statusphere's findings suggest brands are responding by treating influencer content less as a short-lived social activation and more as an owned discovery layer—one that can be amplified across paid media, retail channels and search ecosystems.

"Micro-influencers are becoming an important part of the input layer for AI-driven discovery," says Wiley. "AI answer engines and search platforms are increasingly influenced by the content ecosystem around a product, including reviews, videos, social posts, product pages and third-party content. For beauty brands, that matters because so much product education now happens through creators. Consumers want to understand texture, shade match, skin type, routine fit, before-and-after results and real-life use cases, and micro-influencers are often the ones creating that context at scale."

She adds, "This is where micro-influencers are uniquely powerful. A single celebrity post may drive awareness, but hundreds of highly relevant creators can create repeated, specific associations around a product across TikTok, Instagram, YouTube and search-indexed content. For example, YouTube citations are already appearing in 78% of Google AI Overviews for product comparison searches, showing how creator-led content is increasingly part of the discovery path. The beauty brands that can scale precise, keyword-rich, authentic creator content across platforms will have a structural advantage as AI-driven product discovery continues to grow."

The report also highlights a sharp increase in allowlisting, with brands running three times more creator-generated ads year-over-year, underscoring growing confidence in influencer content as a performance marketing asset. Beauty ranked among the most active sectors for micro-influencer partnerships, while TikTok remained the most requested platform for collaborations.

As allowlisted influencer content and paid amplification become central to distribution, *Global Cosmetic Industry* asked Wiley how beauty marketers are balancing authenticity with the need to engineer creator posts that perform in both social feeds and AI search environments.

"The brands getting this right are not choosing between authenticity and performance," she explains. "They are designing for both from the start."

Wiley notes, "Authenticity starts with the creator match. If the creator is genuinely aligned with the product, the content naturally feels more credible. At Statusphere, we match creators to brands using 300+ targeting parameters, so a beauty brand can find creators based on highly specific attributes like skin concerns, hair type, makeup preferences, shopping behavior and lifestyle fit."

She continues, "From there, we see the strongest results when brands provide clear strategic guardrails, but give creators the freedom to do what they do best: create content that feels native to their voice. The brief should point creators toward the right use cases, keywords, and consumer questions, while still allowing them to share their real experience in their own words and creative style. That balance matters even more as brands amplify creator content. We are seeing brands use allowlisting at 3x the rate year-over-year, because when creator content is matched well and briefed well, it can perform in paid environments without feeling like a traditional ad."

Wiley concludes, "The key is to treat SEO intent, paid performance and authenticity as connected, not separate. The best creator content now needs to work in the feed, in search results and increasingly in AI-driven discovery environments."

Looking ahead, Statusphere identifies YouTube Shorts and Amazon as two key battlegrounds for AI-era visibility. With YouTube content increasingly cited in AI-generated search results and product pages with video consistently outperforming those without, beauty brands may need to rethink influencer programs as part of a broader search and commerce strategy. ■



High-Performance Packaging, Ingredients & Manufacturing



Susonity Boosts Sunscreen Performance with Eusolex T-STE

Susonity, LLC

https://www.susonity.com/US/en/product/PM/105958

Sun care needs performance without compromise. Eusolex T-STE brings compact bulk density, oil-phase dispersibility, high transparency and strong photostability to Susonity's Eusolex UV filter portfolio—helping formulators create elegant sunscreen systems with efficient TiO_2 performance.



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As cosmetic formats evolve, filling technology must deliver precision without compromise. ProSys Fill, with Pendergraph Machines, offers advanced tube, airless and hot melt solutions for creams, gels, and solids. Engineered for flexibility, reliability and efficiency, these systems help manufacturers scale innovation while ensuring consistent quality, performance and premium presentation across every fill.



From Rollerballs to Precision Tips: Cosmopak USA Elevates Product Delivery

Cosmopak USA

https://cosmopak.com/

Cosmopak USA continues to redefine packaging innovation with our latest collection of multifunctional tube solutions. Featuring a wide range of applicator options, dispensing systems, and custom formats, these designs are engineered to enhance product performance and consumer experience. From rollerballs and cooling heads to precision tips and specialty applicators, our solutions bring versatility, functionality, and differentiation to beauty, wellness, and personal care brands.



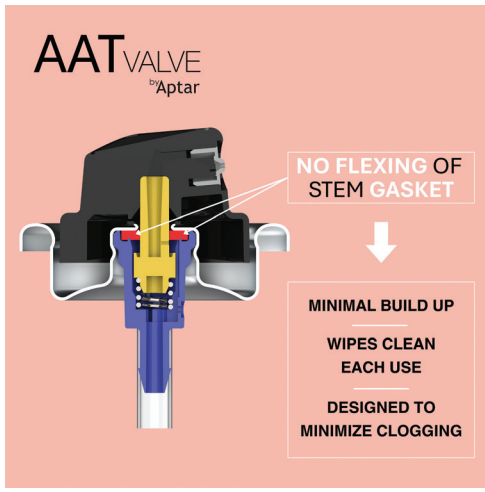
Fluorescein Colorants Bring Stain, Shift and Shine to Lip Color

Spectra Colors Corporation

https://spectracolors.com/fdc-dyes/

Fluorescein Colorants are unique clean colors primarily used for their staining properties in lipstick applications. We can offer D&C orange 5, D&C red 21 and D&C red 27. In addition to their staining properties, they also offer color changing and fluorescent properties.

Images courtesy of the manufacturers

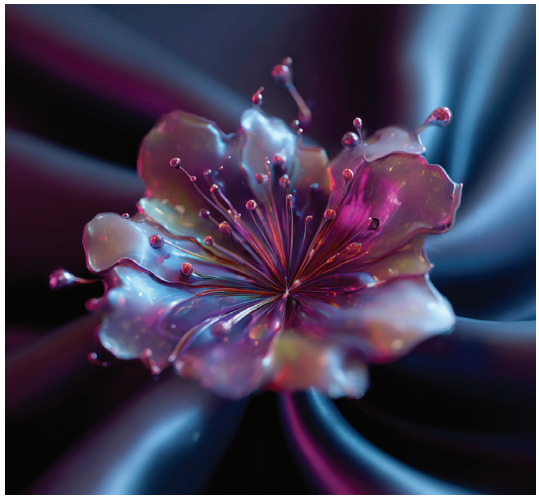


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Aptar Beauty

https://youtu.be/fh2sjFnAQbI

Aptar Beauty's AAT Valve is a U.S.-made valve engineered for complex, high-load powder and shimmer formulations. AAT's advanced straight shank system eliminates gasket flexing and actively wipes residual powder from the stem ensuring consistent valve performance by minimizing clogging, preventing propellant leakage, and maintaining optimal discharge efficiency.



Intensilk: Dermohacking Cellulite Through Circular Bio-Energy

Provital LLC

https://www.weareprovital.com/en/careactives/intensilk

Provital presents Intensilk, the active proven to mimic caloric restriction in adipocytes, opening a new path in body well-aging. Derived from apple blossom, Intensilk provides an anti-cellulite remodeling solution targeting fat reduction and tissue architecture, reprogramming adipocyte metabolism to smooth dimples, restore firmness, and improve skin texture through circular bio-energy.





SPF 50 Serum: High-Performance Sun Protection Meets Dewy Hydration

Sun Deep Inc.

https://sundeepinc.com/

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

This Smart Eye Cream Applicator Brings Device-Led Precision to Eye Care

Nuon Medical

https://www.nuonmedical.com/

This active applicator is designed for eye care, combining red light therapy and microcurrent technology to enhance the application of eye cream. Integrated directly with eye cream tubes through a threaded connection, it enables convenient product dispensing during use. The soft silicone contact surface ensures gentle application around the delicate eye area, while magnetic charging provides reliable and convenient recharging.





RNA Skin Care Breakthrough: RNActivate W Targets Wrinkles at the MicroRNA Level

Biocogent

https://biocogent.com/product/ractivate-w/

RNActivate W is a next-generation RNA skin care ingredient using antagomiRs and a proprietary delivery system to target the microRNA associated with wrinkles. By inhibiting this signal, it restores collagen, elastin, and other ECM proteins. Proven across studies, it improves firmness, elasticity, and wrinkles, supporting stronger, smoother, and more youthful-looking skin.



Silmer Q7-G10 Delivers Luxury Wear With Transfer-Resistant Radiance

Siltech Corporation

https://www.siltech.com/industry-applications/personal-care/

Silmer Q7-G10 is a next-generation silicone film former that brings a refined, luxurious touch to long-wear color. It creates a flexible, radiant veil that resists transfer, enhances payoff, and envelops every formula—from liquid lips to foundations—in a polished, enduring finish.

Images courtesy of the manufacturers



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www.simplexfiller.com

Automate your production with fully automated Simplex Model V-600, a six-head set up. Simplex Fillers have fewer change parts which means more productivity! A perfect combination for success! Built to run 24/7, your productivity can be endless! Contact us today!



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GPI Beauty

https://gpibeauty.com/

Built for life on the go, the Comb-Ination tottle combines targeted application with effortless styling. The integrated comb dispenses formula directly to the scalp or through hair for even, mess-free distribution anytime, anywhere.



THE PROCEDURE-TO-PRODUCT PIPELINE IS GROWING: NEW CONSUMER SURVEY DATA

Providing the proof that consumers seek will give them permission to explore the pre- and post-procedure skin care products that have piqued shoppers' interest.

According to the American Society of Plastic Surgeons[a], cosmetic surgery in the United States has shifted sharply toward "quiet luxury," favoring subtle, natural-looking results over dramatic transformations in 2025, with smaller breast implants, tailored facial anti-aging, and minimally invasive procedures like Botox and fillers dominating the landscape. In addition, the rise of GLP-1 use has spawned an aftercare surge with patients seeking body contouring solutions like tummy tucks, arm lifts and even full-body lifts to remove sagging skin.

The Benchmarking Company (TBC) asked its panel of U.S. female beauty buyers which enhancements they favor—and the at-home skin care solutions they use that can help extend or augment those pricey procedures. In its May 2026 primary online consumer study, 4,000+ respondents revealed the procedures and skin care products they're using now.

Procedures Trending Younger

Twenty-eight percent of women surveyed said they had had a cosmetic procedure—either surgical or nonsurgical—to enhance, reshape or improve the appearance of their face or body in the past five years. Among them, 32% of millennials and Gen Z claim to have had procedures in the past five years,

[a]https://www.americanboardcosmeticsurgery.org/blog/undetectable-cosmetic-surgery-trend/

Image by MOHA STUDIO at Adobe Stock

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Notably, 32% of millennials and Gen Z claim to have had procedures in the past five years, compared to 28% of those in the Gen X generation and 18% of baby boomers.



Dermaplaning was the most common procedure respondents had undergone.

compared to 28% of those in the Gen X generation and 18% of baby boomers.

Those procedures include dermaplaning (13%), Botox or other neurotoxin injections (9%), laser hair removal (5%), other laser services (5%), eyelash lift or tinting (5%), brow laminating or tinting (5%), microdermabrasion (4%), fillers such as Restylane or Juvéderm (4%), chemical peels (4%), microneedling (4%), pore extractions (4%), and medical-grade facials (4%).

The top surgical and other procedures were:

1. Lip augmentation
2. Breast augmentation
3. Other cosmetic dermatology
4. Body contouring (CoolSculpting, Kybella, etc.)
5. Breast lift/reduction
6. Liposuction
7. Tummy tuck
8. Rhinoplasty
9. Blepharoplasty
10. Face lift
11. Butt lift
12. Neck lift

At-home Skin Care Part of Larger Procedure Picture

Thirty-four percent of those who have had procedures say that their procedures and treatments have influenced the skin care products they buy somewhat-to-very-much. That percentage is even higher among those in the Gen Z generation who have had procedures, with 46% saying special skin care products have a significant role to play.

Respondents expect to pay the same or more for these products, with 51% paying the same as their "normal" skin care, and 43% paying more for these specialty products.

Gentle cleansers (77%) are the top category of special skin care products that surveyed consumers use pre- or post-procedure (**F-1**), followed by moisturizers (71%), lotions claiming to heal or repair (68%), sun protection (64%), special serums (52%), balms (36%) and masks (22%).

Goal: Extend, Enhance and Recover Quicker

The last time respondents had their procedures, 19% said they used special post-procedure skin care products to extend or enhance the efficacy of their procedure, or to aid in their recovery. Sixteen percent said they used both a pre- and post-procedure skin care

Image by Marguerite De Valois at Adobe Stock

product for this reason, with 5% using a pre-procedure skin care product for this reason. Younger women who have had procedures (Gen Z and millennial age) were more likely to use special skin care procedures both pre- and post-procedure (17%) than older women.

The rising shift of using special skin care products pre- and post-procedure (as opposed to the 60% who said they just used their regular skin care products pre- and post-procedure) is understood by users as a way to maintain results between treatments (50% use special skin care products pre- and post- for this reason), to extend the benefits of those treatments (49%), and to prepare the skin before their treatments (25%).

Shrinking Procedure Downtime is Important

Seventeen percent use special skin care products pre- and post-procedure to decrease downtime after treatments (**T-1**).

Of those who say they experience any downtime post-procedure, surgical procedures naturally take longest to recover, but there is still some downtime experienced even with minor cosmetic procedures that patients are looking to minimize.

Are Her Pre- or Post-Skin Care Products Working?

Women who use special skin care as part of their cosmetic procedure journey are in large part happy with their outcomes (**F-2**).

The top benefits they strive to achieve from these skin care products are to accelerate healing and repair, to calm the skin, to provide an ultra-gentle and non-irritating salve to the skin, to protect their results, and to reduce downtime.

Brands She Uses & Ingredients She Craves

Skin care brands she's used for pre- or post-procedures varies widely, from doctor brands to those already consumed in the mass market. Top brands used for these purposes included LaRoche Posay (29%), The



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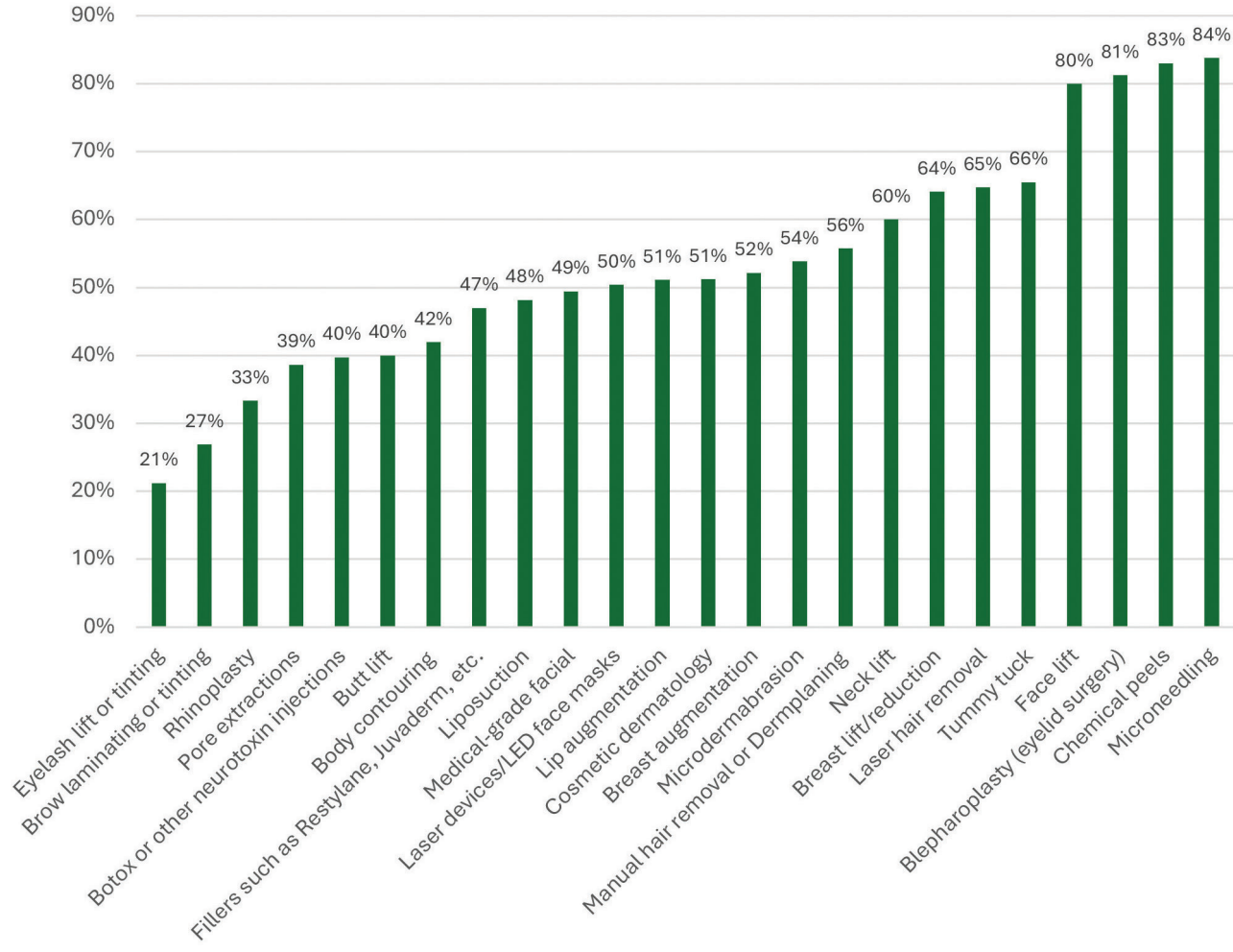
Younger women who have had procedures (Gen Z and millennial age) were more likely to use special skin care procedures both pre- and post-procedure (17%) than older women.

T-1. Typical downtime experienced by respondents

	Typical Downtime She Experiences				
Procedure	**1-3 days**	**4-7 days**	**1-2 weeks**	**3-4 weeks**	**5-6 weeks**
Breast lift/reduction	10%	12%	17%	5%	48%
Tummy tuck	2%	5%	21%	19%	47%
Butt lift	14%	0%	21%	7%	36%
Breast augmentation	11%	9%	21%	17%	34%
Liposuction	7%	9%	27%	20%	25%
Rhinoplasty	3%	10%	28%	21%	24%
Face lift	18%	12%	12%	18%	18%
Body contouring (i.e., Coolsculpting, Kybella)	18%	7%	5%	2%	8%
Neck lift	7%	14%	21%	14%	7%
Cosmetic dermatology	28%	13%	6%	3%	4%
Chemical peels	35%	22%	15%	2%	2%
Laser hair removal	21%	4%	3%	3%	2%
Eyelash lift or tinting	15%	3%	1%	1%	2%
Lip augmentation	28%	18%	4%	3%	1%
Manual hair removal (i.e., waxing, tweezing, dermaplaning)	15%	1%	2%	1%	1%
Pore extractions	13%	2%	1%	2%	1%
Brow laminating or tinting	15%	3%	4%	1%	1%
Medical-grade facial	28%	7%	3%	1%	1%
Laser devices/LED face masks	17%	5%	7%	0%	0%
Botox or other neurotoxin injections	23%	4%	1%	1%	0%
Blepharoplasty (eyelid surgery)	15%	30%	37%	11%	0%
Fillers such as Restylane, Juvéderm, etc.	30%	11%	5%	2%	0%
Microdermabrasion	26%	9%	6%	2%	0%
Microneedling	35%	19%	4%	1%	0%

Courtesy of The Benchmarking Co.

F-1 Percentage of respondents who have used special skin care post-procedure



Ordinary (22%), Dermalogica (22%) and Skinceuticals (21%).

Top specialty skin care brands used:

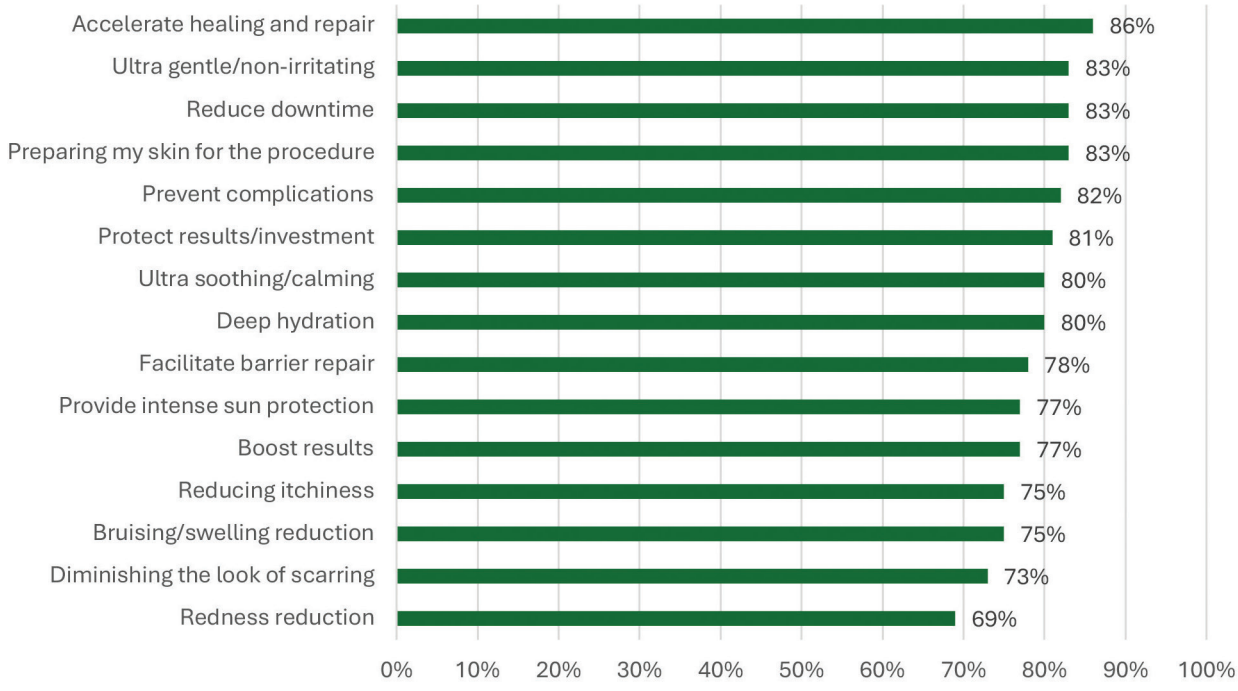
- LaRoche Posay: 29%
- The Ordinary/Dermalogica (tied): 22%
- Skinceuticals: 21%
- EltaMD: 18%
- Alastin/Avene (tied): 13%
- Vanicream/Paula's Choice/Obagi/Elemis (tied): 12%
- SkinMedica: 10%
- Dr. Dennis Gross/Derma E/Dermablend (tied): 9%
- PCA Skin/Vichy (tied): 8%
- Neostrata: 7%
- Skinfix: 6%
- RescueMD/Colorscience/iS Clinical (tied): 5%
- Oxygenetix/Rejuvala/Allies of Skin/Revision skin care/Skinbetter Science/HydroPeptide/Nurse Jamie (tied): 4%
- Co2lift/Replenix/Babor/Skin Gym/GlyMed Plus/Ocucyn (tied): 3%
- Epionce/Marini SkinSolutions/Neocutis/Alumier/Yon-ka/Cutagenesis/FixMySkin/LaserSense/Reliefacyn/Sente/Cyspera/Glytone/Vivier (tied): 2%
- CLn/Victor Michael/Lasercyn/Teoxane (tied): 1%

When she is buying these brands, they are usually from a combination of both her doctor and regular retailers (43%), with only 22% buying only from her doctor, dermatologist or other medical professional.

Ingredients play an important role in her pre- and post-procedure skin care purchasing decisions, with these soothing ingredients she finds most appealing: hyaluronic acid (37%), aloe vera (33%), ceramides (23%), peptides (21%), collagen (20%), retinol (19%), antioxidants (13%), niacinamide (13%), vitamin E (12%), arnica (12%), glycolic acid (11%), vitamin C (11%), exosomes

Courtesy of The Benchmarking Co.

F-2 Percentage of respondents who have achieved pre- or post-procedure benefits with special skin care products

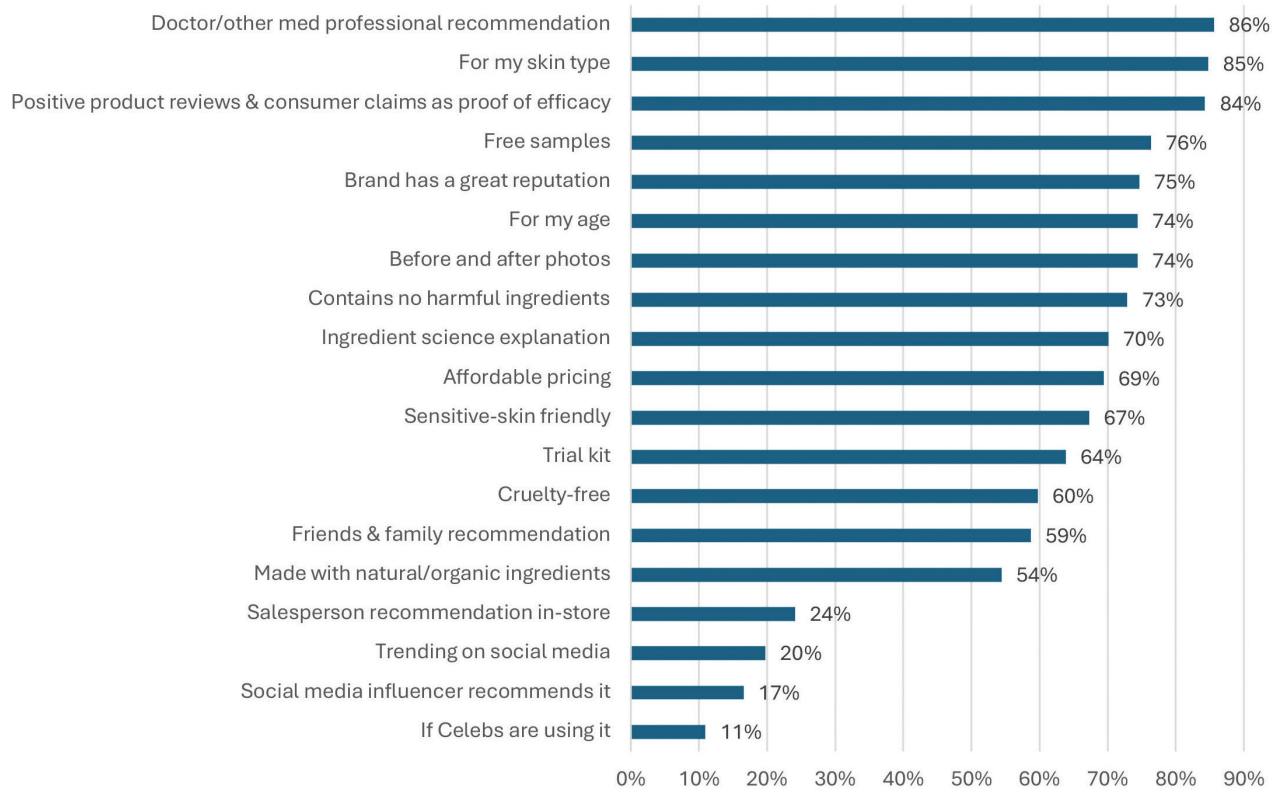




Ingredients play an important role in her pre- and post-procedure skin care purchasing decisions, with these soothing ingredients she finds most appealing: hyaluronic acid (37%), aloe vera (33%), ceramides (23%), peptides (21%), collagen (20%), retinol (19%), antioxidants (13%), niacinamide (13%), vitamin E (12%), arnica (12%), glycolic acid (11%), vitamin C (11%), exosomes (10%), alpha hydroxy acid (10%) and glycerin (10%), among others.

From top: Courtesy of The Benchmarking Co.; image by MM at Adobe Stock

F-3 Top influences that encourage specialty skin care purchases



(10%), alpha hydroxy acid (10%) and glycerin (10%), among others.

What's Enticing to Tomorrow's Specialty Skin Care Buyer?

Consumers are looking for specific, positive keywords on label and in a brand's marketing materials when thinking about the purchase of a new pre- or post-procedure specialty skin care product. These words include repair (54%), dermatologist-tested (52%), soothe (41%), medical-grade (40%), hydrating (40%), heal (30%), calm (29%), clinical (28%), gentle (27%) and rejuvenate (23%). Of course, brands will need to have regulatorily sound language on skin care products classified as cosmetics (be wary of repair, heal, etc.)

Top words she likes seeing on label for pre- and post-procedure specialty skin care:

- Repair: 54%
- Dermatologist-tested: 52%
- Soothe: 41%
- Medical grade: 40%
- Hydrating: 40%
- Heal: 30%
- Calm: 29%
- Clinical: 28%
- Gentle: 27%
- Rejuvenate: 23%
- Non-irritating: 20%
- Recover: 18%
- Results-driven: 16%
- Revitalize: 12%
- Accelerate: 8%

Although a product's label can claim great benefits, she relies on the real-world opinions of her medical professionals (86%) and claims by fellow skin care buyers (84%) as her top purchase influencers.

Providing the proof that consumers seek—in the form of consumer claims from independent third-party research, as well as positive product reviews from consumers like them—will give them permission to explore the pre- and post-procedure skin care products that have piqued their interest.

Does your brand have its consumer claims ready for her review? ■

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Beyond Wrinkles: The Ingredients Rewriting Beauty's Biological Playbook

The industry is moving toward a model where skin care is designed to modulate the skin's internal intelligence, adaptability and long-term biological trajectory.

The beauty ingredients included on in-cosmetics Global 2026's Innovation Zone Best Active Ingredient Award shortlist signaled a clear shift in beauty R&D from surface-level correction to systems biology thinking, where skin is treated as a living, multi-network organ. Rather than targeting isolated concerns like wrinkles or dryness, innovation is increasingly focused on the skin as an integrated system involving neurological, immune, microbial, and metabolic communication. The result is a reframing of aging as a breakdown in coordination and signaling, not just structural decline.

A major frontier is biological reprogramming of skin behavior, moving beyond repair into control of cellular instruction itself. RNA modulation, epigenetic repair, DNA photorepair, recombinant PDRN, and ECM-targeting peptides all point toward a future where skin is "trained" at the genetic and post-transcriptional level. In parallel, neuro-cosmetic and microbiome–mind approaches expand skin care into sensory and emotional biology, linking skin function to perception, touch, and even neurotransmitter signaling.

At the same time, delivery systems and bioengineering platforms are becoming as critical as the actives themselves, enabling precision control over when, where, and how ingredients act. Exosomes, enzyme-triggered release systems, bioelectric signaling, and HA-based transport platforms are converging with sustainability-driven biomanufacturing like fermentation and precision farming. Overall, the industry is moving toward a model where skin care is designed to modulate the skin's internal intelligence, adaptability and long-term biological trajectory.

Neuro-Longevity Skin Care: Restoring the Skin's Sensory Intelligence

Synatis from Naemos is an eco-designed active derived from *Isatis tinctoria*, cultivated through precision indoor farming and enhanced via the Elite elicitation platform to boost neuroactive compounds such as sinapic acid. Unlike conventional anti-aging ingredients, Synatis targets the cutaneous nervous system, focusing on neuro-aging by supporting mechanosensation and restoring the skin's ability to perceive and respond to mechanical stimuli—key processes involved in maintaining structural integrity and trophic signaling. By regulating mechanosensitive ion channels, it helps revive communication pathways between nerves and skin cells, contributing to improved resilience and function. Clinically, Synatis demonstrates reductions in wrinkles and skin deformation, supporting smoother, more responsive skin. Positioned at the forefront of neuro-cosmetics, it reframes skin longevity as not only structural and biochemical, but also sensory and neurological.

Microbiome-Mind Skin Care: Where Skin Comfort Meets Sensory Biology

Calneurin-Sense from Rahn is a chicory root–derived cosmetic active designed to operate at the intersection of the skin, microbiota, and sensory perception, advancing the concept of a microbiota–skin–mind axis. Built on sustainably sourced *Cichorium intybus* extract and ClimatePartner-certified credentials, the ingredient aims to restore skin balance disrupted by stress and environmental exposure by modulating beneficial microbiota activity. In vitro data suggest it stimulates *Staphylococcus epidermidis* to produce factors linked to neurotransmitter signaling

pathways, while maintaining the skin's natural defenses, with downstream associations to dopamine- and oxytocin-related responses. Clinically, Calneurin-Sense demonstrates improvements in hydration, luminosity, evenness, and firmness, along with measurable gains in skin smoothness and tactile quality—up to 17.6% improvement in firmness during movement. Positioned within the emerging field of neurodermatopsychology, it extends skin care beyond appearance to include perceived comfort, sensory experience, and social touch dynamics, reframing beauty as a bio-sensory interaction between skin, microbes, and mind.

Hyaluronic Acid Becomes a Precision Delivery Engine for High-Performance Actives

VectorHyal from Givaudan Active Beauty introduces a hyaluronic acid–based biopolymer delivery platform designed to solve the long-standing trade-off between high active loading and elegant cosmetic aesthetics. Developed with Nanovetores, the system uses a transparent HA chassis capable of stabilizing both hydrophilic and lipophilic ingredients while maintaining clear, premium formulations. Its engineered release mechanism is triggered by skin enzymes, enabling controlled, sustained delivery of encapsulated actives directly within the dermal environment rather than an immediate surface burst.

By reframing hyaluronic acid from a simple humectant into a multifunctional transport vehicle, VectorHyal enhances stability, penetration, and performance for sensitive molecules prone to degradation. Positioned as a formulation enabler for premium skin care, it empowers brands to combine high-efficacy active systems with visually flawless textures that meet modern consumer expectations for both science and sensorial appeal.



VectorHyal from Givaudan Active Beauty introduces a hyaluronic acid–based biopolymer delivery platform designed to solve the long-standing trade-off between high active loading and elegant cosmetic aesthetics.

Antarctic DNA Repair Enzyme Sets a New Bar for Photoaging Defense

ANKros-CPD from Antarka takes a fundamentally different approach to anti-aging by targeting one of the root causes of photoaging: UV-induced DNA damage. The recombinant Antarctic photolyase, derived from UV-resistant *Hymenobacter* bacteria, directly repairs cyclobutane pyrimidine dimers (CPDs)—the primary DNA lesions caused by ultraviolet exposure. In ex vivo human skin studies, the ingredient achieved complete removal of CPDs, restoring DNA damage levels to their pre-irradiation baseline. Notably, the enzyme demonstrated epidermal penetration without the need for liposomes or other delivery technologies, underscoring its intrinsic skin accessibility. Beyond its DNA-repair credentials, ANKros-CPD delivered clinically measured improvements in elasticity (+28.7%) and firmness (+25.4%) while reducing biological skin age markers by two years. Produced through scalable recombinant biotechnology rather than environmental extraction, the ingredient combines cutting-edge photorepair science, sustainability and strong substantiation to create a highly differentiated platform for next-generation anti-photoaging skin care.

Longevity at the Cellular Level

Algaktiv's Vitalys is a biotech-derived longevity active designed to address skin aging by targeting the Telomere–Mitochondria Axis, a key biological pathway linked to cellular decline.

Image courtesy of Givaudan

Sourced from *Chlorella vulgaris*, the ingredient combines a proprietary liposomal delivery system with three repair enzymes to enhance DNA repair mechanisms, increase NAD+ levels and stimulate SOD2 and Sirtuin 1 activity—markers associated with cellular resilience and longevity. Clinical testing demonstrated a 17.7% improvement in skin firmness and a 17.5% reduction in wrinkles, while advanced epigenetic analyses indicated restoration of more youthful DNA methylation patterns.

Cyclic Peptide Science Takes Aim at Skin Regeneration

APderma CollaCyclic from JiTai Biotech is positioning itself as a next-generation anti-aging active by leveraging advanced cyclopeptide architecture to go beyond the limitations of traditional linear peptides. Designed to target integrins and activate cellular repair pathways, the ingredient stimulates extracellular matrix regeneration, increasing Type I and IV collagen, fibronectin and hyaluronic acid production while strengthening the skin barrier. Clinical testing showed wrinkle length reductions of up to 62.35%, a 19.91% improvement in skin elasticity and an 18.54% decrease in transepidermal water loss (TEWL) after 28 days. The company highlights the ingredient's low-use-level efficiency, synthetic animal-free production and sustainability credentials, including EcoVadis Silver recognition, making it a compelling option for brands seeking science-backed regenerative skin care claims with a strong innovation and sustainability story.

Plant Exosomes Rewriting the Language of Skin Aging

Exovive Lift from dsm-firmenich applies regenerative medicine principles to skin care by using plant-derived exosomes to restore cellular communication and reprogram skin functionality. Designed to address the breakdown in intercellular signaling that contributes to aging, the active delivers a dual mechanism of action through secondary metabolites and miRNA cargo, with evidence suggesting regulation of key proteins involved in wrinkle formation and other hallmarks of aging.

Advanced imaging via holotomography has visualized vesicle penetration into cells and migration toward the nucleus, reinforcing its mechanistic credibility. In vivo results show up to a 33% increase in skin elasticity after two months and a visible reversal of up to eight years of wrinkle appearance, outperforming standard fruit extract benchmarks. Positioned at the intersection of plant biotechnology and cellular rejuvenation science, Exovive Lift reframes botanical skin care as an active driver of biological reprogramming.

RNA Technology Moves From Medicine to Skin Care

RNActivate W from Biocogent introduces a novel RNA-based strategy to skin rejuvenation, shifting the focus from applying reparative ingredients to empowering skin cells to restore themselves. The active uses a targeted antagomiR—a molecule designed to inhibit a specific microRNA involved in extracellular matrix (ECM) regulation—combined with a proprietary delivery system that overcomes one of the industry's biggest barriers to RNA skin care: effective skin penetration.

By modulating cellular signaling at the post-transcriptional level, RNActivate W aims to support healthier ECM production, improving skin structure from within. Clinical testing demonstrated statistically significant improvements in skin smoothness, with visible wrinkle reduction beginning at four weeks and continuing through 12 weeks of use. As one of the first cosmetic ingredients to harness epigenetic RNA modulation in a commercially viable format, RNActivate W represents a potentially transformative step toward precision skin care that works by reprogramming, rather than merely treating, the visible signs of aging.

Upstream Control of Pigmentation and Skin Inflammation

Peptid4 Light MB from Chemyunion introduces a new paradigm in hyperpigmentation care by targeting melanin formation at its origin rather



Clinical testing on RNActivate W from Biocogent demonstrated statistically significant improvements in skin smoothness, with visible wrinkle reduction beginning at four weeks and continuing through 12 weeks of use.

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than correcting it after the fact. Designed as a PFAS-free, in silico–engineered tetrapeptide, it functions as a competitive MC1R antagonist, blocking the α-MSH signaling cascade and downregulating key melanogenesis drivers including TYR, TYRP-1, DCT, and RAB27A. In parallel, it reduces Endothelin-1 (-62%), helping break the inflammation-driven inflammaging loop that often exacerbates pigmentation issues in sensitive skin. The result is a dual-action approach that not only reduces melanin production but also calms erythema and supports dermal structure, including a reported boost in Type I collagen. With clinically demonstrated improvements in radiance and pigmentation within 28 days, Peptid4 Light MB positions itself as a next-generation, sensitive-skin-friendly active combining precision bio-signaling control with strong sustainability credentials.



Malvallin from Croda Beauty introduces a 3D architect concept in skin care, designed to restore facial structure and perceived vitality across all skin layers rather than simply smoothing the surface.

Rebuilding the Skin's 3D Architecture of Beauty

Malvallin from Croda Beauty introduces a 3D architect concept in skin care, designed to restore facial structure and perceived vitality across all skin layers rather than simply smoothing the surface. This multifunctional active works on three levels: it refines surface texture while enhancing hydration and radiance, strengthens core dermal cohesion to improve firmness and support, and targets deeper structural dynamics associated with facial volume and contour definition.

Supported by extensive in vitro and in vivo testing, Malvallin is positioned as a biomimetic solution that preserves and reactivates the skin's natural "architectural capital," helping maintain youthful convexity and expression. Its effects are not only measured clinically but also validated through perceptual studies, including eye-tracking data showing enhanced attractiveness signals. Framed as an alternative to flattening or corrective aesthetics, Malvallin aligns with the shift toward more natural, expressive, and multi-generational skin care focused on longevity, density, and structural skin health.

Immune-Inspired Skin Resilience from the First Blueprint of Life

Glycare SK Renew from dsm-firmenich leverages human milk oligosaccharide (HMO) biotechnology to create a sensitive-skin resilience protocol inspired by the earliest stages of human development. Using precision fermentation to replicate nature's protective sugars, the active is designed to strengthen the skin's ability to adapt, recover, and maintain balance under stress. Clinical testing shows meaningful improvements in barrier repair, including a 19% reduction in transepidermal water loss (TEWL), a 38% decrease in erythema, and a 67% increase in collagen I, alongside support for a healthier microbiome ecosystem. Positioned as a life-inspired, science-enhanced solution, Glycare SK Renew frames skin resilience as something that can be biologically reprogrammed using mechanisms drawn from early immune system development.

Extremophile Algae Redefines Long-Lasting Skin Hydration and Longevity

AlgaSurge from Clariant's Lucas Meyer Cosmetics introduces a blue biotechnology–derived skin longevity active sourced from extremophile microalgae, designed as a high-performance, vegan alternative to hyaluronic acid and PDRN. Built on a sulfated polysaccharide hydrogel structure, the ingredient is engineered for enhanced resistance to enzymatic degradation, enabling more durable hydration effects over time. Its dual-action architecture combines surface film formation with

Image by Stella at Adobe Stock

deeper dermal activity, supporting moisture retention, stimulating pro-collagen I production, and helping restore autophagic function in aged fibroblasts. In comparative clinical testing against hyaluronic acid, AlgaSurge demonstrated measurable improvements in skin plumpness, density, barrier integrity, and visible signs of aging such as wrinkles and uneven tone. Positioned at the intersection of marine biotechnology and longevity science, it reframes algae not just as a hydrator, but as a structural and cellular skin renewal platform.

Skinome Science: Reprogramming Skin Longevity Through Plant Intelligence

Shisome from Naemos is an eco-designed active derived from Red Shiso microgreens cultivated via precision indoor farming and enhanced through the proprietary Elite elicitation platform. This controlled, climate-independent biotechnology approach amplifies the plant's natural defense chemistry, significantly increasing antioxidant polyphenols such as rosmarinic acid while ensuring reproducibility, traceability, and reduced environmental impact.

Framed around a novel "skinome" concept—integrating the genome, proteome, lipidome and microbiome—the ingredient is designed to protect the skin's entire biological ecosystem from oxidative stress, slowing functional aging at multiple levels. Clinically, Shisome demonstrates improvements in wrinkle appearance, skin firmness, hydration, and sagging, supporting more resilient and balanced skin. Positioned at the intersection of plant biotechnology and holistic skin longevity science, it reframes skin care as ecosystem preservation rather than surface correction.

Recombinant DNA Repair Rewrites the Future of PDRN

RJMPDRN REC from Uniproma GmbH introduces the world's first recombinant salmon-derived PDRN, produced through patented biosynthesis technology rather than traditional animal extraction. With 98% homology to human DNA, the ingredient is designed to deliver high safety, purity, and biological compatibility while offering a fully animal-free, scalable, and traceable production model. Engineered as a next-generation DNA-fragment active, it supports skin repair, anti-inflammatory responses, brightening, and anti-aging benefits, while ensuring tight control over molecular size distribution for consistent performance. Its fermentation-based manufacturing enables excellent stability, formulation flexibility, and reliable supply chain scalability across cosmetic applications. Positioned at the intersection of biotechnology and regenerative skin care, RJMPDRN REC reframes PDRN from a niche bio-extract into a standardized, sustainable, and high-precision active platform for modern skin repair systems.

Bioelectric Skin Care: Reawakening the Skin's Cellular Current

Ignilyte from Vytrus Biotech is a dragon fruit stem cell–derived active designed to restore the skin's bioelectrical communication system, positioning itself as a device-free alternative to electrostimulation and electroporation. This 100% natural biotechnology ingredient works by mimicking electrical signaling processes to enhance cellular permeability and activate internal regenerative pathways, effectively recharging skin vitality from within. Its proprietary Plant Electrines complex—comprising glycoproteins and electrolytes—facilitates controlled biological membrane permeability, supporting improved delivery of endogenous repair signals. Clinically, Ignilyte demonstrates visible well-aging benefits, including reductions in wrinkles, puffiness, and sagging, alongside lifting effects around the eyes and face. Positioned at the frontier of bioelectric skin care, it reframes rejuvenation as an intrinsic cellular energy process rather than an externally driven mechanical treatment. ■



Shisome from Naemos demonstrates improvements in wrinkle appearance, skin firmness, hydration and sagging, supporting more resilient and balanced skin.

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Debut and Natura have formed a strategic partnership to develop and commercialize an AI-discovered longevity ingredient complex that combines precision biotechnology with Amazonian biodiversity.

Image courtesy of Debut/Natura

Editor's Notebook: the Beauty Ingredients Driving Newness in the Market

From mango derivatives to upcycled hydrocarbons, ingredient technologies are rapidly evolving.

From in-cosmetics Global in Paris to NYSCC's Suppliers' Day in Manhattan, our editors have rounded up the latest beauty ingredient launches designed to drive innovation across categories, from preservation to sensory excellence to longevity and beyond.

AI Meets the Amazon in a New Longevity Beauty Alliance

Debut and Natura have formed a strategic partnership to develop and commercialize an AI-discovered longevity ingredient complex that combines precision biotechnology with Amazonian biodiversity. The collaboration pairs Debut's proprietary AI platform—which can computationally evaluate up to 96 billion molecular possibilities in days—with Natura's deep expertise in nature-derived bioactives and more than two decades of work with Amazonian ingredients and local communities. The resulting longevity complex will blend Debut's novel biotech actives with Natura's botanical portfolio to target key biological drivers of skin aging, with product launches possible as early as 2027 following clinical validation. Beyond the ingredient itself, the partnership signals a broader shift in beauty innovation, where AI-driven molecular discovery is increasingly being integrated with traditional botanical knowledge to accelerate the development of high-performance, scientifically validated skin care. Positioned at the intersection of artificial intelligence, biotechnology, and biodiversity, the alliance offers a glimpse into how the next generation of beauty ingredients may be discovered and commercialized.

The Return of Beauty Oils as Luxury Powerhouses

Vantage Personal Care's Infinite Oil concept reflects the resurgence of natural oils as premium hero ingredients, fueled by social media



Vantage Personal Care's Infinite Oil concept reflects the resurgence of natural oils as premium hero ingredients. Featured formulations include the Scalp & Hair Cleansing Oil, a pre-wash treatment designed to nourish, protect, and condition hair and scalp before shampooing.

Image by Pixel-Shot at Adobe Stock

trends and consumer demand for multifunctional, sensorially rich beauty experiences. Rather than treating oils as simple moisturizers, the concept positions them as versatile performance ingredients across skin care, hair care and nail care.

Featured formulations include Elixir du Soleil, a lightweight facial oil-serum blending jojoba, grapeseed, olive squalane, and cacay oils for hydration, radiance, and elegant skin feel; Princess Treatment Nail Infusion, which applies the skinification trend to nail care through fast-absorbing botanical oils; and Scalp & Hair Cleansing Oil, a pre-wash treatment designed to nourish, protect, and condition hair and scalp before shampooing. Together, the concepts highlight a broader industry shift toward natural oils that combine efficacy, sustainability, and luxury sensoriality, transforming familiar botanical ingredients into aspirational, cross-category beauty solutions.

Luxury Foam Without Sulfates

Adinol CT30 DS from Croda is a sulfate-free surfactant designed to deliver the rich foam consumers expect while maintaining the mildness increasingly demanded in modern skin and hair care. Based on sodium methyl cocoyl taurate, the ingredient provides effective cleansing for facial cleansers, shampoos and body washes without the irritation often associated with traditional sulfate systems, making it particularly suitable for sensitive, oily, and combination skin.

Derived primarily from plant-based sources, Adinol CT30 DS combines high-performance sensoriality with strong sustainability credentials, including 86% natural-origin content under ISO 16128, ready biodegradability, and compliance with vegan, halal, and RSPO standards. As brands continue to move away from sulfates, the ingredient exemplifies a broader industry trend toward next-generation cleansing systems that balance gentle skin compatibility, luxurious foam aesthetics, and environmentally conscious formulation.



Adinol CT30 DS from Croda is a sulfate-free surfactant designed to deliver the rich foam consumers expect while maintaining the mildness increasingly demanded in modern skin and hair care.

Solving the Neutral pH Preservation Challenge

Geogard Neu from Arxada is a patent-pending multifunctional protection system designed to address one of personal care formulation's most persistent technical hurdles: maintaining effective product protection at or near neutral pH. Engineered to perform at exceptionally low inclusion levels starting at just 0.03%, the ingredient offers a cost-efficient alternative to traditional preservation approaches that often lose effectiveness outside acidic environments or require

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significantly higher usage rates. By combining established multifunctional ingredients with existing safety and regulatory profiles into a synergistic blend, Geogard Neu delivers product protection while also contributing antioxidant and skin-conditioning benefits. Compatible with both rinse-off and select leave-on applications, the powder-format technology is positioned as a practical solution for reformulation projects seeking to meet evolving regulatory expectations, consumer preferences, and cost targets without compromising product quality, stability, or manufacturing efficiency.

One Mango-Derived Active Targets Nine Signs of Aging

Mangiophelin from Sabinsa is a mango-derived multifunctional active designed to streamline anti-aging formulations by addressing a wide spectrum of skin concerns through a single ingredient. Sourced from immature, deseeded *Mangifera indica* fruit and standardized to contain at least 10% polyphenols and 1% mangiferin, the ingredient delivers potent antioxidant activity aimed at combating wrinkles, dullness, roughness, sagging, uneven tone, age spots, blemishes, and loss of elasticity.

Its distinguishing feature is its dual-format versatility, with efficacy positioned for both topical



Mangiophelin from Sabinsa is a mango-derived multifunctional active designed to streamline anti-aging formulations by addressing a wide spectrum of skin concerns through a single ingredient.

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Solésence's WHSPR is an advanced delivery system that enables high concentrations of allantoin to remain stable in anhydrous formats such as serums, balms and oils.

skin care and ingestible beauty applications, aligning with the rapidly growing beauty-from-within and nutricosmetics markets. By combining broad-spectrum anti-aging benefits with a recognizable botanical source and cross-category formulation flexibility, Mangiophelin reflects the industry's growing interest in holistic wellness-driven beauty solutions that blur the line between skin care and nutrition.

Silicone Engineering Redefines Sensory Luxury in Modern Formulation

At in-cosmetics Global 2026 in Paris, Shin-Etsu Silicones Europe B.V. unveiled a new generation of silicone-based raw materials designed to push the boundaries of texture, stability, and sensorial performance across multiple formulation formats. Presented through an immersive texture bar experience, the portfolio spanned O/W, W/O, W/Si emulsions, gels, powders, bi-phasic systems, and anhydrous textures, reflecting a strong focus on formulation versatility for next-generation beauty products.

Key innovations included KF-6070W, a water-soluble silicone wax enabling smooth, hydrating O/W emulsions with a melting, skin-adaptive feel, and KF-6080W, a silicone emulsifier engineered for high stability in systems containing organic oils and UV filters while maintaining a non-tacky finish. Additional materials such as WHP-100MS, a hybrid soft-focus powder, and elastomer gels KSG-16-SF and KSG-19-PF further enhance blurring, silkiness, and powdery elegance in final textures.

Solésence Expands Skin Health and Color Cosmetics with Dual Technology Launch

Solésence has introduced two platform technologies—WHSPR and Chromalüm—designed to unlock new levels of efficacy, formulation flexibility, and category expansion across beauty and wellness products. WHSPR is an advanced delivery system that enables high concentrations of allantoin to remain stable in anhydrous formats such as

Image by Beauty Hero at Adobe Stock

serums, balms and oils, overcoming a longstanding formulation challenge. Clinical testing demonstrated significant improvements in skin barrier recovery, barrier strength, hydration, and redness reduction.

Meanwhile, Chromalüm is a high-brilliance color technology engineered to work alongside the company's Kleair sun protection platform, allowing color cosmetics to deliver broad-spectrum UV protection without sacrificing coverage, aesthetics, or performance. Together, the technologies reflect the growing convergence of beauty, skin health, and wellness, creating new opportunities for multifunctional products that combine therapeutic benefits with premium cosmetic performance across skin care, color cosmetics, and potentially hair and scalp care.

Upcycled Hydrocarbons Challenge Silicones in Next-Generation Beauty Formulations

Pilot Chemical Company is introducing UpSyCal BA17 and UpSyCal BA14, two sustainable branched hydrocarbon emollients engineered to replace silicones, mineral oils, and traditional esters without sacrificing sensory performance. Produced using upcycled carbon from non-edible biomass combined with renewable castor oil feedstocks, the ingredients reflect the industry's growing focus on high-performance sustainability. BA17 (pentyldodecane) is positioned as a squalane-like emollient that delivers silicone-inspired spreadability, pigment wetting, and a non-greasy finish across skin care, hair care and color cosmetics, while BA14 (pentylnonane) targets applications traditionally served by volatile silicones such as cyclopentasiloxane, offering fast-drying, lightweight, and low-residue sensory characteristics. Both materials support cold-process manufacturing, carry a high natural-derived index under ISO 16128, and meet clean beauty expectations from major retailers. Together, they exemplify a broader industry movement toward renewable, upcycled alternatives that replicate the performance benefits of legacy ingredients while aligning with evolving sustainability, regulatory, and consumer demands. ■





From hybrid beauty concepts and sensory innovation to novel textures with emotional impact, industry innovators are exploring new ways to bring energy back to the makeup aisle. The question is: what will it take to turn isolated bright spots into sustained category growth?

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Color Cosmetics at a Crossroads: THE CATEGORIES AND STRATEGIES SET TO RESTART GROWTH

Industry innovators are exploring new ways to bring energy back to the makeup aisle.

The color cosmetics category is searching for its next growth engine.

While mass makeup outpaced prestige in the first quarter of 2026, overall category performance remained subdued, per Circana[a]. Dollar gains were modest, unit sales declined—particularly in mass channels—and many established segments struggled to reignite consumer excitement. Yet beneath the soft topline numbers, bright spots emerged, particularly in lip.

Lip treatments and lip liners delivered growth in both dollars and units, reflecting consumers' continued appetite for products that blur the line between makeup and skin care. That trend is accelerating online: according to May 2026 Spate data[b], lip serums—a hybrid format combining the hydration of a balm with the shine of a gloss—surged in popularity by 301.7% year over year. While still a relatively niche category, lip serums are gaining traction on TikTok, where the trend grew 273.5% and generated nearly 83,000 average weekly views. Much of the momentum has been fueled by brands such as Laneige, whose expansion beyond overnight lip masks into tinted lip serums demonstrates the growing consumer demand for multifunctional, treatment-oriented color cosmetics.

Elsewhere in the lip sector, color-changing lipstick is making a comeback, with search interest surging 265.3% year over year, per Spate, as consumers rediscover personalized, pH-reactive beauty. TikTok is fueling the trend's momentum, driving 58% of total interest and 344.6% growth through influencer content, tutorials and product hacks. While skepticism around shade accuracy remains, strong engagement and rising interest in adjacent formats like color-changing lip oils suggest the category has room to grow beyond novelty.

Meanwhile, per Circana, blush and bronzer continue to benefit from consumers' preference for healthy, skin-enhancing beauty looks, suggesting that complexion-enhancing and care-infused products remain among the category's strongest growth opportunities.

The mixed results highlight a category at a crossroads. Consumers are still engaging with makeup, but they're becoming more selective about where they spend, gravitating toward products that offer self-expression, added benefits or clear differentiation. For brands, the challenge is to create compelling reasons for consumers to rediscover, repurchase and reengage with color cosmetics.

From hybrid beauty concepts and sensory innovation to novel textures with emotional impact, industry innovators are exploring new ways to bring energy back to the makeup aisle. The question is: what will it take to turn isolated bright spots into sustained category growth?

We've gathered some ideas.

Skin-First Makeup: Mood + Function

"Makeup is evolving beyond only focusing on the visual results into a more holistic, skin-first and experience-driven category," says Michelle Chavez, chief commercial officer at Accupac, a contract development and manufacturing organization. "For brands, this means formulating color cosmetics that actively support how consumers want to feel—energized, calm or restored—while still delivering performance."

She adds, "From a formulation standpoint, this starts with

[a]https://www.circana.com/post/us-beauty-market-delivers-steady-first-quarter-growth-circana-reports

[b]https://www.spate.nyc/



Sensorial design has become a key differentiator in beauty, with texture, scent and application playing a central role in the consumer experience.

incorporating ingredients traditionally seen in skin care, such as adaptogens, nootropic-inspired botanicals and clinically studied actives that help support the skin under stress. When paired with tone-evening pigments or complexion-enhancing technologies, these ingredients help products like foundations, skin tints, and concealers to deliver real skin care benefits and visible results."

Hannah Kohl, marketing associate at ingredient supplier Croda, concurs, noting, "One aspect of how 'treat culture' manifests in color cosmetics comes from the multifunctionality of products and the additional benefits of actives acting as that "'sweet treat' or cherry-on-top. When it comes to makeup, many consumers are already using these products daily (mascara, foundation, blush, etc.), so adding in any actives with added skin benefits is an extra treat that boosts mood for those consumers. For example, if I'm already using foundation daily, adding in some sort of anti-aging active feels like a little extra way to treat myself and prioritize self-care through personal care routines."

Sensorial design has become a key differentiator in beauty, Chavez adds, with texture, scent and application playing a central role in the consumer experience. Features such as cooling sensations, skin-care-infused formulas and mood-enhancing sensory cues can elevate makeup from a functional product to a more engaging, wellness-oriented ritual.

"For brands," she concludes, "the opportunity lies in designing products that perform instantly on the skin while delivering a more immersive, mood boosting experience that consumers can feel in real time."

Croda's Zenakine fits neatly into this rising trend. The neuroactive ingredient helps mitigate the effects of stress on the skin by supporting natural melatonin production, improving sleep quality, enhancing emotional well-being and promoting skin regeneration, with clinically measured benefits for both sleep quality and duration.

"In a world filled with daily stressors, any means of relief can be welcome and that relief could even come from cosmetics," says Jaemi Ong, market applications specialist at Croda. "Zenakine is an active that can be used in hybrid makeup formulations to elevate relaxing emotions. It increases melatonin production by skin cells. Under high cortisol levels brought about by stress, this biofermentation extract stimulates the production of 'feel-good' hormones like oxytocin and

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dopamine. Not only does Zenakine improve mood, it also helps smooth out wrinkles. In fact, Croda has clinical data demonstrating the measurable positive effects of Zenakine."

Hybrid Color Cosmetics Redefine Performance: Where Makeup Becomes Skin Care with Dual-Action Benefits

"The future of color cosmetics is increasingly hybridized—delivering immediate aesthetic benefits alongside measurable skin health improvements," says Chavez. "This is particularly important for aging and menopausal consumers, whose needs center around hydration, barrier support, tone uniformity and comfort."

She notes, "Products like serum foundations, treatment concealers and active-infused primers are leading this shift."

In March 2026, Spate reported that serum concealer is surging on digital channels, with 167% year-over-year growth in popularity and TikTok driving 88.2% of the conversation, alongside 2.5 million weekly views despite relatively low search volume. While still an early-stage trend, strong brand clustering in search behavior and expanding interest in serum foundations point to accelerating adoption of skin care-forward makeup formats.

Chavez notes, "These formats can incorporate clinically supported ingredients such as peptides, ceramides, niacinamide and low-level retinoid alternatives to target concerns like fine lines, elasticity loss, and uneven tone—while still delivering coverage and finish."

She adds, "Equally important is delivering both immediate and long-term results. Consumers expect to see visible improvement—whether through instant radiance smoothing, or plumping—while also trusting that continued use contributes to skin health over time. This dual benefit reinforces product value and supports simplified routines, where fewer products are needed to achieve both cosmetic and treatment outcomes."

Finally, she says, "For brands, success lies in combining proven actives, advanced delivery systems and high-performance pigments into formats that seamlessly integrate into daily routines—making makeup not just a finishing step, but a functional part of skin care."

Bringing that functionality to life is the Pure Blur Skin Prep | Redness Reset, a concept product developed by Cosmetic Group USA, a California-based contract manufacturer. This color-corrector specifically targets redness while reinforcing the skin barrier with Lipoid Kosmetik's PhytoPreserve. Integrating this rich, lipid-replenishing active into a lightweight, blurring primer offers a unique user experience.

"The strategy is to place those barrier-supportive lipids into a very light, modern gel-emollient base, then balance them with fast-spreading esters and a dry-touch blurring system," says Mat Rashidi, executive director of R&D, Cosmetic Group USA. "That gives the skin the comfort and replenishment it needs, but without the residue people tend to associate with richer corrective products. We also paired that nourishing base with a precise pigment blend and dual-silica blur system, so the formula feels airy and elegant on application while still



Ilia's Skin Blur Serum Concealer, launched earlier this year, typifies the rising interest in serum makeup formats.

Image courtesy of Ilia

giving visible redness reduction and a smooth primer finish."

The primer also incorporates Givaudan's Neurophroline to combat the skin's biological markers of stress. This extends a neurocosmetic benefit to a product format that is typically viewed through a purely color-corrective lens.

"That is where the story becomes much more elevated," Rashidi says. "Traditional redness correction is usually framed as a visual fix, but consumers are increasingly aware that reactive skin often reflects more than surface color alone. So we position the product as doing two things at once: it immediately neutralizes visible redness, but it also supports skin that looks stressed or easily triggered. That gives the consumer the instant payoff they expect from a color-corrector, while introducing a more sophisticated skin-wellness story that feels very current."

Univar Solutions' Interstellar Glowing Highlighter is another relevant example. The fresh, cushiony cream highlighter was designed to enhance natural features while elevating mood and self-perception through the lens of psychodermatology. More than just glow, the highlighter imparts a sensory beauty experience that supports confidence as it illuminates.

Users can apply a single dot and watch as an ultra-fine shimmer melts into a seamless, long-wear luminous veil that lasts from day to night. Powered by a skin-loving combination of dsm-firmenich's Quali B Niacinamide PC and Oxy229, the formulation reportedly helps boost radiance while supporting a healthy-looking complexion.

"This radiance enhancing highlighter is powered by the synergistic blend of Quali B Niacinamide PC and OXY 229CB, two clinically recognized ingredients that work together to help promote a brighter, smoother and more revitalized complexion," says Claudia Barba, technical services manager, beauty and personal care, North America, Ingredients + Specialties at Univar Solutions. "Niacinamide PC, a gentle and highly stable form of vitamin B3, supports sensitive skin while improving elasticity, refining texture and supporting skin tone. OXY 229CB, a post-biotic rich active containing fermentation-derived components and skin respiration enhancers, helps boost oxygen uptake, stimulate cell vitality, and increase turnover to refresh dull looking skin."



Pure Blur Skin Prep | Redness Reset, a concept product developed by Cosmetic Group USA, is a color corrector that specifically targets redness while reinforcing the skin barrier.

Barba continues, "When combined, these actives complement each other to help support surface renewal, balanced tone, and a healthy, luminous glow. This synergy makes the highlighter ideal for helping enhance the natural radiance of both the face and décolletage, delivering a smooth, light reflective finish supported by skin-beneficial science."

Skin-forward color cosmetics offer opportunities to better serve consumers.

"More people have heightened skin sensitivities so brands should consider using ingredients suitable for sensitive skin and those that nurture skin health," says Croda's Ong. "Surfactants tend to remove beneficial oils from the skin therefore using milder cleansing systems is recommended. Adinol CT30 DS and Natrafusion SL HA are two Croda surfactants that have data to show they effectively cleanse without irritating the skin. Supporting the skin's natural microflora is essential to skin health. BB-Biont is a skin care active that protects the skin's microbiome and smooths blemishes. HydroAvena HpO is a plant-based protein and oat-derived polysaccharide complex that balances bacteria and fungi present in the skin while also bolstering skin moisturization. Using ingredients with proven efficacy will allow brands to create impactful skin-friendly products."

Kohl adds, "The proof is in the pudding! Clinical trials, social media virality videos, or really any sort of visual, measurable proof is the best way to support skin-friendly claims. Consumers today have a hard time

Image courtesy of Cosmetic Group USA

trusting just words, they want to see action and real results in the palm of their hand."

Airy Texture, Dual Finish: How Formulas Balance Aesthetics and Performance

"Texture and wear are critical," says Chavez. For example, she explains, "Mature and menopausal skin often experiences dryness and sensitivity, so formulations must prioritize breathable coverage, flexible film formers and long-wear hydration. The goal is to create products that move with the skin, rather than sit on top of it."

Textures shifts can also support category shifts. For instance, structuring agents can help brands transition from traditional powder formats to high-growth complexion stick and jelly formats.

"Use of structurants and oil gellants help create stick and jelly formats," says Jaemi Ong, market applications specialist at Croda. "Most of Croda's Syncrowaxes will create sticks with strong structure and suspension but if the stick is too strong, you won't get the desired payoff. Adding some Syncrowax HRC, which is a soft wax, will reduce stick rigidity and it will help with smooth application. Oleocrafts thicken oils which can create formats ranging from viscous oils to solid clear anhydrous sticks. How well the structure is formed will depend on compatibility of the oils in the formulation with the Oleocraft product used."

Ong adds, "Water-based jelly creams can be made with rheology modifiers like Volarest FL. Volarest FL is easy-to-use, has suspension properties, and allows for processing without heat."

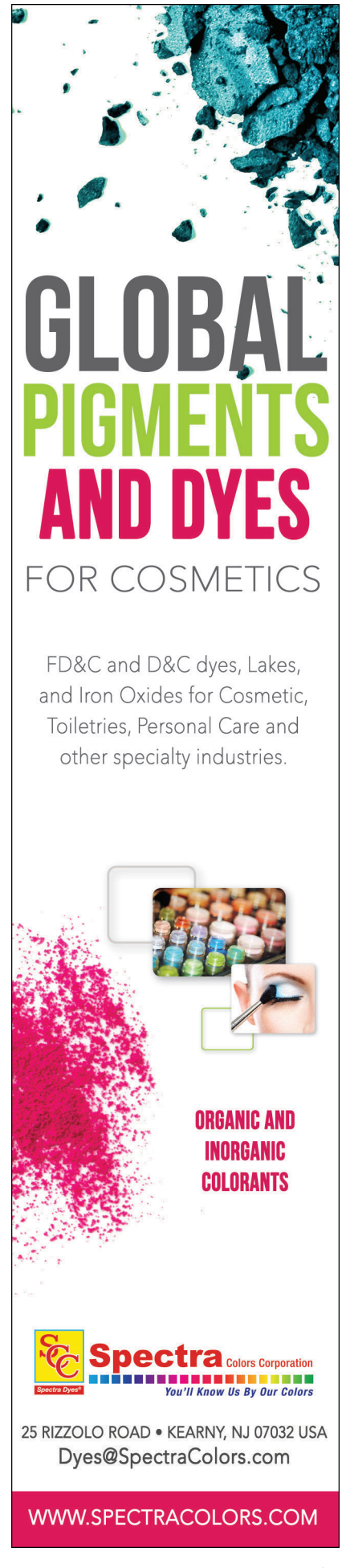
Of course, textures can also deliver on experiential fun.

Cosmetic Group USA's Matte + Glow/Matte + Glow Souffle TouchUp, a



Cosmetic Group USA's Matte + Glow/Matte + Glow Souffle TouchUp, a dual concept product, addresses the #cloudskin aesthetic and a dewy look.

Image courtesy of Cosmetic Group USA



dual concept product, addresses the #cloudskin aesthetic and a dewy look. Key ingredient technologies ensure both soufflé textures are identical—air-whipped, lightweight and smooth—while still allowing for opposing final visual effects.

"The common thread is a very airy gel-emollient matrix that gives both formulas that whipped, soufflé-like feel from the very first touch," says Rashidi. "Once that texture is established, we can fine-tune the final visual effect by adjusting the ratio of soft-focus powders to glow-supporting emollients and film formers. That is what allows both textures to feel equally plush, smooth and lightweight, while still giving two very different complexion finishes: one more diffused and cloud-like, the other fresher and more radiant."

Notably, the formulas claim 24-hour moisturization and blurring without caking.

"With a touchup formula, it is not enough for it to feel good in the jar," says Rashidi. "It has to perform beautifully on the skin and over makeup. We focused on building a stable, uniform texture with enough flexibility to spread evenly, enough powder balance to blur, and enough emollient support to keep it from breaking apart or looking patchy. That is what allows the formula to refresh the complexion instead of disturbing it, so the finish stays soft, smooth and hydrated-looking without caking."

Sustainability Goes Inside the Formula: Where Performance, Simplicity and Climate-Ready Beauty Converge

"Sustainability is increasingly being addressed at the formula level, not just through packaging claims," says Accupac's Chavez. "In color cosmetics, this creates strong opportunities to rethink how products are developed without compromising quality or performance."

She adds, "Waterless and low-water formulations are a key area of innovation. Concentrates and hybrid powder-serum systems can significantly reduce water usage while helping to enhance pigment intensity and shelf stability. These formats also lend themselves well to complexion and lip products, where performance and portability are critical."

In addition, Chavez says, "Upcycled ingredients present another high-value opportunity. Many by-products—such as fruit extracts, seed oils or biomass-derived actives—can be refined into efficacious ingredients that help support skin barrier health, hydration, or antioxidant protection. When incorporated into color cosmetics, these materials can elevate both formulation story and functional benefit."

An example of sustainable makeup in action is the Pure Canvas Priming Stick—Hybrid Color from Cosmetic Group USA. The stick is billed as a streamlined, "accountable sustainability" answer to multi-step routines.

"The message is really about intelligent simplicity," says Rashidi. "This stick gives you the smoothing and grip of a primer, but also delivers a soft wash of tone-balancing color in the same step, so you can streamline your routine without giving up performance. For consumers who are embracing skin streaming, that is exactly the kind of product they are looking for. It feels edited, modern and efficient, while still giving the complexion that polished, refined look."

Achieving a smooth, non-dragging application in a stick format, especially when incorporating oil-absorbing silica and blurring powders, is difficult, of course. Global Cosmetic Industry asked Rashidi what combination of emollients ensures a velvet-soft touch that avoids the fibrous or dusty perception consumers sometimes associate with natural powders.

"That sensorial balance comes from suspending the powders inside a very glide-friendly gelled emollient system," he explains. "We used a mix of soft-touch esters, lightweight oils, squalane



The Pure Canvas Priming Stick—Hybrid Color from Cosmetic Group USA is billed as a streamlined, "accountable sustainability" answer to multi-step routines.

Image courtesy of Cosmetic Group USA

and a structured oil gel to keep the formula creamy and flexible on contact. That way, the powders can deliver blur, oil control and soft-focus payoff without dominating the feel of the stick. The result is a velvet-soft application that feels smooth and cushioned on the skin, never dry, fibrous or dusty."

The squalane and natural emulsifiers in the formulation are sustainably sourced. This is intentional. Rashidi explains, "Consumers today want to know that ingredient choices are thoughtful, not incidental. We communicate that by showing that materials like squalane and naturally derived structuring ingredients were selected not only for their elegant skin feel, but also for the sourcing philosophy behind them. When those choices are directly tied to product performance, the sustainability story feels much more credible. It becomes part of how the formula works and feels, rather than just a message layered on afterward."

Formulas aren't only addressing sustainability on the sourcing and production fronts. They're also addressing the realities of a changing climate.

"Climate-adaptive beauty products need to perform well under changing environmental conditions, such as air pollution, extreme heat and temperature fluctuations," says Croda's Ong. "These products might feature ingredients that protect against oxidative stress and maintain skin hydration in varied environments. Examples from Croda Beauty include Fibrashield, a multi-peptide that works to protect hair from environmental damage, and our Sphingocare line of ceramides that reinforce the skin barrier to prevent water loss."

Kohl adds, "Some great climate-ready elements sure to stand out in color cosmetics are anti-humidity claims and staying power for makeup longevity, especially in setting sprays. We're also seeing a lot of cooling technologies in skin care products now have potential to make their way into color cosmetics, as these cooling textures work great in heat, and sensoriality is key to makeup trends today as lines continue to blur between skin and makeup. As always, any SPF claims in makeup also create a stand-out product, and that's through all categories of color cosmetics, from blushes to concealers to lip care with SPF claims."

There are additional considerations, of course, beyond the formula.

"Packaging must evolve in parallel and be aligned to best serve the formula," says Chavez. "Highly concentrated products enable smaller pack sizes, reduced material use, and lower transportation impact. The most successful approaches integrate formula efficiency, ingredient sourcing, and packaging design into one cohesive system—ensuring that sustainability enhances, rather than detracts from, product performance."

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TRUST
YOUR CELLS
to learn and restore

RNActivate W

Precisely targets the skin's "wrinkle miRNA"

Boosts collagen, elastin and fibrillin synthesis

Clinically proven to reduce key signs of aging

RNActivate™ W is a next-generation active powered by RNA epigenetic technology. Using Biocogent's proprietary delivery system, it targets the skin's "wrinkle microRNA" with precision-engineered antagomiRs that restart collagen, elastin, and fibrillin production. This restores the skin's structural foundation — improving firmness, elasticity, thickness, and smoothness. Backed by compelling in vitro, ex vivo and clinical data, RNActivate W delivers visible wrinkle reduction and universal improvement across key signs of aging.



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Ingredient Toolbox: Next-Gen Pigments and Active Beauty Systems Redefine Performance Color Cosmetics

Beyond Sparkle: Synthetic Mica's Functional Edge

Unlike natural mica, synthetic mica (synthetic fluorphlogopite) is manufactured through a controlled industrial process rather than mined, offering a range of performance and formulation advantages, argues Rebecca Vaiarelli, strategic marketing manager, Susonity. Its inherently whiter, cleaner and brighter appearance makes it particularly valuable in cosmetic applications, while its lower heavy metal content helps reduce risk in sensitive products such as eye makeup.

Synthetic mica also features a highly uniform platelet structure, enabling more intense, consistent color and visual effects across a wide variety of formulations. This consistency extends from batch to batch, helping manufacturers achieve reliable shade matching at scale while reducing production variability, time and costs.

In formulations ranging from eyeshadows to shampoos, synthetic mica delivers versatile performance: fine-particle silver-white grades provide a clean, bright appearance with soft luster and opacity, while larger particles create brilliant sparkling effects.

Iron oxide-coated versions produce rich, natural-looking earth tones, especially reds, while interference pigments offer high chroma, striking optical effects and a smooth skin feel. As a functional filler, synthetic mica can also enhance whiteness, opacity and overall sensory performance.

"We have several syn mica pigments that act as 'functional fillers' so not only can they act as a talc replacement they can also offer additional functional benefits such as improved skin feel, enhanced texture, increased luminosity and transparency," says Vaiarelli. "Formulators can also combine both natural and synthetic mica or any other materials such as silica, etc., depending on the ratio you will achieve a varying degree of effects."

Science-Driven Lash Density and Follicle Care in One System

SymLash XTreme by Symrise delivers a holistic eye beauty approach that combines visible lash enhancement with long-term follicle care. Built on a patented lipopeptide and troxerutin complex, it targets key biological pathways linked to keratin expression and follicle protection, supporting improved eyelash density and overall lash quality in a short timeframe.

The ingredient is designed to address both aesthetic performance and underlying lash health, aligning with growing demand for care-centric eye products. Its water-soluble liquid format allows easy, heat-free incorporation and uniform dispersion in formulations, making it highly practical for formulators. Backed by science-led substantiation and



In formulations ranging from eyeshadows to shampoos, synthetic mica delivers versatile performance: fine-particle silver-white grades provide a clean, bright appearance with soft luster and opacity, while larger particles create brilliant sparkling effects.

Image by Beauty Agent Studio at Adobe Stock



SymLash XTreme by Symrise delivers a holistic eye beauty approach that combines visible lash enhancement with long-term follicle care.

quantified performance claims, SymLash XTreme enables brands to deliver measurable results while supporting lash resilience over time.

Hydrophobically Treated Pigment Dispersion for Next-Gen Hybrid Color Care

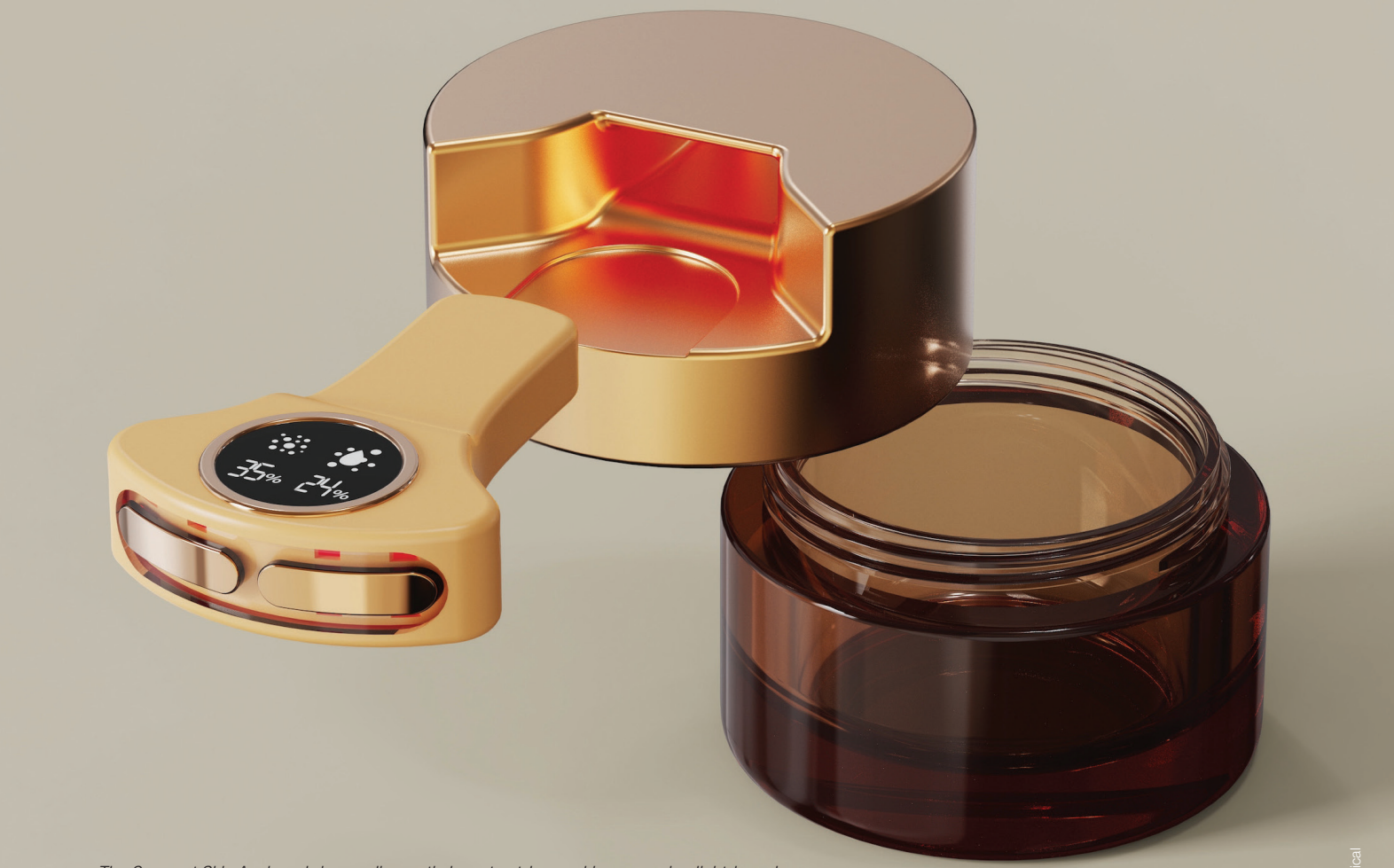
Covamic AS from Sensient is a ready-to-use dry dispersion combining mica and mineral pigments, engineered with AS surface treatment (triethoxycaprylsilane) to deliver a superior sensory feel and enhanced hydrophobicity. Industrially processed for easy dispersibility, it is designed to streamline formulation in facial makeup and hybrid color-care products where performance and skin feel are equally critical. Its adaptable technology allows customization of pigment, substrate, and surface treatment to meet specific formulation needs, enabling brands to fine-tune payoff, texture, and compatibility across a range of modern complexion and hybrid skin care-makeup systems. ■



Image courtesy of Symrise

PACKAGING LOOK BOOK: CO-ENGINEERING SUSTAINABILITY & PERFORMANCE

Packaging must deliver across the full lifecycle, from shelf appeal to end-of-life circularity, without compromise.



The Compact Skin Analyzer brings a diagnostic layer to at-home skin care, using light-based assessment and vibrational feedback to evaluate hydration and skin balance.

Image courtesy of Nuon Medical

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Ultra-light all-plastic pumps to no-drip precision systems, mono-material wipes packaging and luxury-grade PCR decoration, the latest wave of cosmetic and personal care packaging innovation underscores a clear industry pivot: performance and sustainability as co-engineered expectations. Across leading launches from Nuon Medical, Aptar, Mondi, Viva and others, brands are being offered solutions that combine recyclability, e-commerce resilience, elevated aesthetics and consumer-centric functionality, signaling a future where packaging must deliver across the full lifecycle, from shelf appeal to end-of-life circularity, without compromise.



Aptar has launched Astrea, a new airless packaging platform that combines the product protection benefits of airless technology with a fully recyclable ultra-lightweight glass bottle, targeting prestige skin care and dermocosmetic brands seeking more sustainable packaging solutions.

A New Recyclable Glass Airless Package for Prestige Beauty

Aptar has launched Astrea, a new airless packaging platform that combines the product protection benefits of airless technology with a fully recyclable ultra-lightweight glass bottle, targeting prestige skin care and dermocosmetic brands seeking more sustainable packaging solutions.

Designed to deliver the performance expected from premium airless systems, Astrea offers fast priming, high product restitution, 360-degree dispensing, and enhanced formula protection through a POM-free pump cartridge featuring a metal-free product pathway. The system is compatible with a broad range of skin care and cosmetic formulations.

The launch reflects growing demand for packaging that balances luxury aesthetics with recyclability. Astrea's transparent tubular glass bottle and metal-look components create a premium appearance while allowing the package to enter the glass recycling stream at end of life.

Available in 15 ml, 30 ml and 50 ml formats, Astrea features a lightweight Type III glass bottle paired with a PE piston, a transparent CoPo base, and customizable pump options delivering either 150 µL or 240 µL dosages. Brands can further differentiate the package through a range of decoration, coloration and finishing options.

By pairing recyclable glass with airless dispensing technology, Aptar is positioning Astrea as a solution for brands looking to reduce packaging complexity while maintaining the efficacy, protection and premium presentation increasingly expected in high-end skin care.

The launch highlights a broader industry trend toward combining sustainability-driven materials with advanced dispensing systems, particularly as prestige beauty brands face growing pressure to improve recyclability without compromising consumer experience.

From LED to EMS: Next-Gen Multimodal Beauty Devices

At in-cosmetics Global in Paris and Luxe Pack New York, Nuon Medical showcased a new generation of multifunctional beauty devices that blur the line between skin care, diagnostics and at-home treatment. Across a tightly designed portfolio, the focus is clear: combine clinical-grade modalities—light therapy, microcurrent, vibration and thermal control—with intuitive, consumer-friendly formats that elevate everyday routines into targeted treatment experiences.

Leading the range is the Rejuvenation Roller Tip, an active facial applicator that integrates red and blue LED therapy with vibration technology. Designed for precision application, the rounded roller tip enables controlled, comfortable use

Image courtesy of Aptar

while supporting skin clarity, tone improvement and blemish reduction. The added vibration function enhances product absorption and delivers a soothing, massage-like finish.

The Compact Skin Analyzer brings a diagnostic layer to at-home skin care, using light-based assessment and vibrational feedback to evaluate hydration and skin balance. After just seconds of contact, it delivers a moisture readout on a clear display, offering immediate insight into skin condition. Its compact, storage-ready design with bottom charging and indicator lighting reinforces its role as a seamless, on-the-go skin monitoring tool.

Expanding into scalp care, the LED Mist Comb for Scalp Care combines red light therapy with a refillable essential oil mist system. Featuring 14 red light beads, it is designed to support scalp circulation and nourishment while delivering hydration through a soft mist, creating a more sensorial and treatment-led approach to hair wellness. A soft silicone grip and simple charging system emphasize ease of daily use.

The Skin Soothing Device takes a more recovery-focused approach, pairing red and infrared LED therapy with dual thermal functionality. With both cooling and warming modes, it is designed to calm the skin post-treatment, reduce visible irritation and support overall skin revitalization. Thoughtful design details such as Type-C charging and ring-style battery indicators reinforce its premium, user-centric engineering.

Completing the lineup is the Dual-End Eye Tool with Cold Compress, a targeted under-eye treatment device that combines red light therapy with a cooling applicator tip. Designed to brighten and refresh the eye area, it also features a detachable rollerball for gentle massage and even product distribution, reinforcing its dual role in both treatment delivery and cosmetic application.

Together, the collection underscores Nuon Medical's emphasis on convergence—where diagnostics,



The Rejuvenation Roller Tip is an active facial applicator that integrates red and blue LED therapy with vibration technology.



The LED Mist Comb for Scalp Care combines red light therapy with a refillable essential oil mist system. Featuring 14 red light beads, it is designed to support scalp circulation and nourishment while delivering hydration through a soft mist

Images courtesy of Nuon Medical



The Skin Soothing Device takes a more recovery-focused approach, pairing red and infrared LED therapy with dual thermal functionality. With both cooling and warming modes, it is designed to calm the skin post-treatment, reduce visible irritation and support overall skin revitalization.



The Dual-End Eye Tool with Cold Compress, a targeted under-eye treatment device that combines red light therapy with a cooling applicator tip.



Aptar's newly launched Advance Collection introduces two omnichannel-ready dispensing formats—the GSA Advance pump and PZ Advance spray pump—while the new HDP platform expands options for high-dose applications with what is claimed to be the shortest stack height currently available in the category.



Aptar's new HDP platform expands options for high-dose applications with what is claimed to be the shortest stack height currently available in the category.

therapy and sensory experience merge into compact, design-forward devices that reflect the next phase of intelligent beauty.

New All-Plastic Pump Platforms Target Recyclability, E-Commerce and Premium Design

A new generation of all-plastic dispensing systems is aiming to help beauty and personal care brands meet growing demands for recyclability, e-commerce durability and product differentiation.

Aptar's newly launched Advance Collection introduces two omnichannel-ready dispensing formats—the GSA Advance pump and PZ Advance spray pump—while the new HDP platform expands options for high-dose applications with what is claimed to be the shortest stack height currently available in the category.

Designed for recyclability, all three platforms eliminate metal components and are rated "Highly Recyclable" when paired with compatible HDPE, PP or PET bottles, supporting brands' efforts to improve packaging circularity.

The GSA Advance is a full-plastic, POM-free pump developed for personal care applications. Featuring a twist-to-lock mechanism and a plastic spring positioned outside the dosage chamber, it delivers a 2 cc dose while maintaining compatibility with

From top, L to R: Images courtesy of Nuon Medical; Aptar; Nuon Medical; Aptar

a broad range of formulations, from water-thin liquids to high-viscosity products. Its modular architecture allows brands to customize aesthetics and functionality while supporting premium and lifestyle positioning.

For spray applications, the PZ Advance delivers a 190-microliter dose through a full-plastic design engineered for products ranging from sun care to on-the-go personal care. The pump features a 90-degree twist-to-lock mechanism that eliminates the need for a cap while enhancing e-commerce readiness and consumer convenience.

The new HDP platform targets categories requiring larger doses, including body care, baby care and hair care. Delivering 3.5 cc per stroke, the all-plastic pump incorporates a metal-free spring located outside the dosage chamber and is designed to enter the polypropylene recycling stream as a single-material component. With a stack height of just 15 mm, the company says HDP offers the shortest profile currently available in the high-dose pump segment, maximizing shelf visibility while maintaining a sleek appearance.

All three platforms are designed to withstand e-commerce distribution requirements and offer modular customization options, reflecting a broader industry shift toward packaging solutions that combine sustainability, performance and brand expression without sacrificing consumer convenience.

Recyclable Wet Wipes Pack With 35% PCR Content Ahead of EU Packaging Rules

Mondi is expanding its sustainable packaging portfolio with the launch of re/loop FlowWrap, a recyclable mono-material solution designed for wet wipes applications that combines high performance with 35% post-consumer recycled (PCR) content.

Developed for the home and personal care market, re/loop FlowWrap is a form-fill-and-seal (FFS) packaging solution made from mono-polypropylene (PP), replacing conventional non-recyclable laminate structures often used for baby care, cosmetic and household wipes. The material is designed for compatibility with existing packaging lines, enabling brands and converters to transition without significant equipment modifications.

The launch comes as packaging manufacturers prepare for the European Union's Packaging and Packaging Waste Regulation (PPWR), which will require 35% recycled content from post-consumer plastic waste in this packaging category by 2030. With 35% PCR content already incorporated into the structure, Mondi positions the solution as a future-ready option for compliance and circularity goals.

According to the company, extensive internal testing and customer trials demonstrated that re/loop FlowWrap delivers performance comparable to virgin-based alternatives, including strong sealing integrity, barrier protection and efficient machinability. Additional trials conducted on IMA Ilapak packaging equipment confirmed reliable runnability at high production speeds.

"With this launch, we show that wet wipes packaging can move towards circularity without sacrificing performance," said Alessandro D'Agostino, business development manager, home and personal care, at Mondi Consumer Flexibles. "By combining a material designed for recycling with PCR content and excellent machinability, we help customers transition faster towards sustainable packaging solutions while maintaining operational efficiency."



With 35% PCR content already incorporated into the structure, Mondi positions the solution as a future-ready option for compliance and circularity goals.



Viva's Platinum Series, which uses advanced vacuum metallization to create mirror-like metallic finishes on jars, closures, sticks, lip gloss bottles and other packaging components.

Bringing Luxury Looks to Sustainable Packaging

As prestige beauty brands seek packaging that delivers both visual impact and sustainability, Viva is expanding its portfolio of advanced decoration technologies designed to bridge the gap between luxury aesthetics and environmental responsibility.

The company is highlighting a suite of premium finishing capabilities—including its Platinum Series, Water Transfer Decoration platform and refillable packaging systems—that enable brands to achieve high-end shelf appeal while incorporating post-consumer recycled (PCR) materials and more circular packaging formats.

At the center of the portfolio is Viva's Platinum Series, which uses

From top: Images courtesy of Mondi; Viva



Viva is advancing refillable packaging through its reuse-and-refill jar system.



Viva has significantly expanded its Water Transfer Decoration capabilities through investments in automation and domestic manufacturing.



Aptar has introduced Evo No Drip, a new dispensing pump engineered to solve one of beauty packaging's most persistent consumer frustrations: product residue left behind after dispensing.

From top: Images courtesy of Viva; Viva; Aptar

advanced vacuum metallization to create mirror-like metallic finishes on jars, closures, sticks, lip gloss bottles and other packaging components. The technology offers virtually unlimited color possibilities, supports direct-print silkscreen decoration and can be applied to packaging containing up to 100% PCR resin.

Manufactured and decorated entirely in North America, the Platinum Series also supports shorter supply chains and reduced transportation impacts while helping brands maintain a prestige appearance.

Viva is also advancing refillable packaging through its reuse-and-refill jar system. By replacing only the inner pod, consumers can reduce plastic usage by more than 80% with each refill cycle. The platform accommodates up to 100% PCR content across the jar, refill pod and closure, while offering premium decoration options such as vacuum-metallized closures, water transfer graphics, custom overcoat sprays and direct-print silkscreen designs.

Meanwhile, the company has significantly expanded its Water Transfer Decoration capabilities through investments in automation and domestic manufacturing. Recent upgrades eliminate traditional batch processing in favor of continuous, automated production, improving consistency, scalability and manufacturing efficiency.

Additional innovations include in-house molding, assembly and multi-process decoration, along with direct resin coloration that removes the need for background color layers in the water-transfer process. The result is a more streamlined manufacturing approach that delivers complex decorative effects while reducing production complexity.

As beauty brands increasingly look to combine sustainability credentials with premium consumer experiences, Viva's latest investments reflect a growing industry trend: sustainable packaging is no longer expected to look sustainable—it is expected to look luxurious.

A No Drip Pump to Eliminate Mess, Waste and Product Residue

Aptar has introduced Evo No Drip, a new dispensing pump engineered to solve one of beauty packaging's most persistent consumer frustrations: product residue left behind after dispensing.

Designed for applications such as liquid foundations, lotions and other precision-dosed formulations, Evo No Drip features an innovative anti-drip nozzle that prevents residual product from accumulating or flowing after use. The result is a cleaner, more controlled dispensing experience that minimizes mess, improves hygiene and reduces product waste.

The new system is built on Aptar's established Evo cartridge platform, enabling seamless integration with standard 18/400 neck finishes while maintaining compatibility with existing packaging formats.

At the heart of the technology is an additional suck-back adapter positioned between the insert and cartridge. Working in combination with flexible and rigid polypropylene components, the mechanism helps retract residual product after dispensing, preventing unwanted dripping and ensuring a cleaner nozzle between uses.

The launch reflects growing consumer demand for packaging that delivers both performance and convenience, particularly in premium beauty categories where product cleanliness and application precision are closely tied to brand perception.

By addressing post-dispensing residue, Aptar is positioning Evo No Drip as a packaging upgrade that enhances the consumer experience while helping brands reduce wasted product and maintain a more premium appearance throughout the product's lifecycle. ■



TikTok has cemented its role as a discovery channel, and its influence on Amazon search rankings means that virality on one platform now directly monetizes on another.

Beauty's Digital Reordering: TikTok Shop Surges as Amazon Holds, But No Longer Dominates Growth

BY **OLIVIA STELMASZCZYK,** Consultant, Euromonitor

U.S. e-commerce sales of beauty and personal care (BPC) grew by 16% in 2024-2025—four times the rate of the broader industry. That gap is not an anomaly; it reflects a structural reordering of how Americans discover, evaluate and buy beauty products. TikTok Shop posted triple-digit growth, Amazon extended its dominance, and a new cohort of largely independent brands outpaced the industry's biggest names. For beauty brand owners, retailers, and suppliers, the composition of those online shopping carts has never mattered more.

Image by Hanna Pad at Pexels

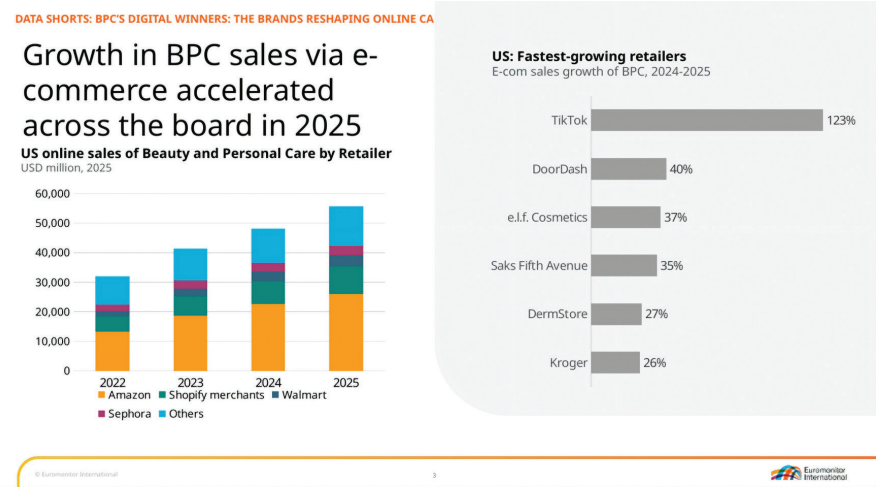
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The Platform Landscape: Amazon Holds, But Others Accelerate

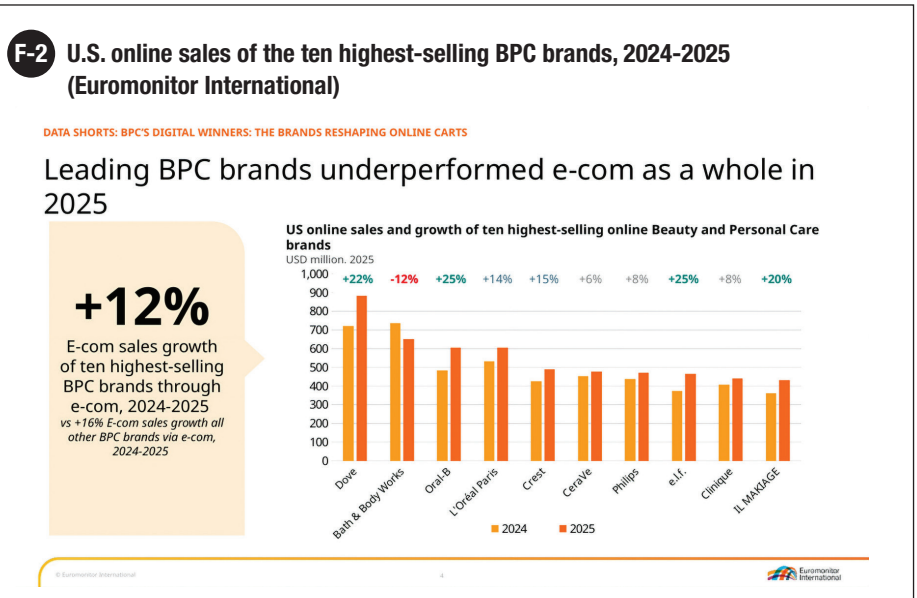
Amazon retained its position as the largest single retailer (**F-1**), accounting for just under 47% of total US online BPC sales in 2025. Yet, its growth (+14%) came in marginally below the industry's e-commerce rate, a sign that challenger retailers are starting to close the gap. Shopify, which powers the direct-to-consumer (DTC) storefronts of hundreds of independent brands, grew 21% and represented approximately 17% of total online BPC sales. The most striking number, however, belonged to TikTok Shop, which recorded 123% growth, underlining how social commerce is reshaping both discovery and purchase behavior.

The retailer growth table tells a similarly pointed story. DoorDash (+40%), Saks Fifth Avenue (+35%) and e.l.f. Cosmetics' own digital channel (+37%) all posted strong gains, reflecting a broadening of the competitive retail landscape. For suppliers and manufacturers, the implication is clear: channel diversification is no longer optional. Brands that are not building capabilities across at least two or three platforms risk being structurally disadvantaged as the market fragments further.

F-1 **U.S. online BPC sales by retailer, 2022-2025, and fastest-growing retailers, 2024-2025 (Euromonitor International)**



F-2 **U.S. online sales of the ten highest-selling BPC brands, 2024-2025 (Euromonitor International)**



Established Leaders: Strong, But No Longer Setting the Pace

The ten largest BPC brands by online sales grew at a combined rate of 12% in 2025 (**F-2**)—below the 16% industry average—illustrating a pattern common in maturing digital markets: scale imposes limits on momentum. Dove led the group in absolute terms, gaining almost $900 million in online sales, while posting +22% growth. Oral-B and e.l.f. both achieved +25%, with e.l.f. sustaining its momentum through aggressive paid digital spend and a consistent pipeline of viral content. Il Makiage (+20%) demonstrated the commercial value of AI-powered recommendation tools in converting digital browsers into buyers.

Bath & Body Works was the notable underperformer, declining 12% as a slow end-of-year gifting season weighed on results. The brand's relative dependence on seasonal purchasing occasions—and its limited TikTok presence—serves as a cautionary reminder that distribution breadth alone does not guarantee digital resilience. Although, the brand is making efforts to improve its digital ecosystem, launching an official Amazon storefront in early 2026.

Rising Brands: Three Clusters, One Common Thread

Euromonitor's Rising Brands analysis (**F-3**) segments high-growth digital challengers into three clusters based on annual online sales: Established (above $100 million), Emerging ($50–100 million) and Upstart ($20–50 million).

Collectively, these brands dramatically outpaced the industry, and

Courtesy of Euromonitor International

the channel strategies that underpin their growth vary meaningfully by tier.

Established Brands

Brands including Medicube, kitsch, Eos, Kayali and Anua grew online sales by 69% in aggregate (**F-4**). Only 39% of their sales ran through Amazon, compared with the 47% industry benchmark, reflecting a deliberate multi-channel strategy.

Medicube—the standout performer—generated over $296 million in online sales, with 79% of that volume flowing through Amazon and 14% via TikTok Shop. Its success is rooted in a combination of clinical K-beauty formulations, accessible mass-market pricing, and a highly optimized Amazon presence driven by social virality. Eos reinforced the power of influencer-led education through campaigns such as Lotion Lock, while Wonderskin's peel-and-reveal lip stains generated sustained organic reach across Instagram and TikTok.

Emerging Brands

Brands including Dr. Melaxin, Salt & Stone, Bella Vita, and Byoma grew by 106%, and these brands bucked the broader trend by leaning into Amazon rather than away from it—matching the 47% industry average for Amazon share (**F-5**).

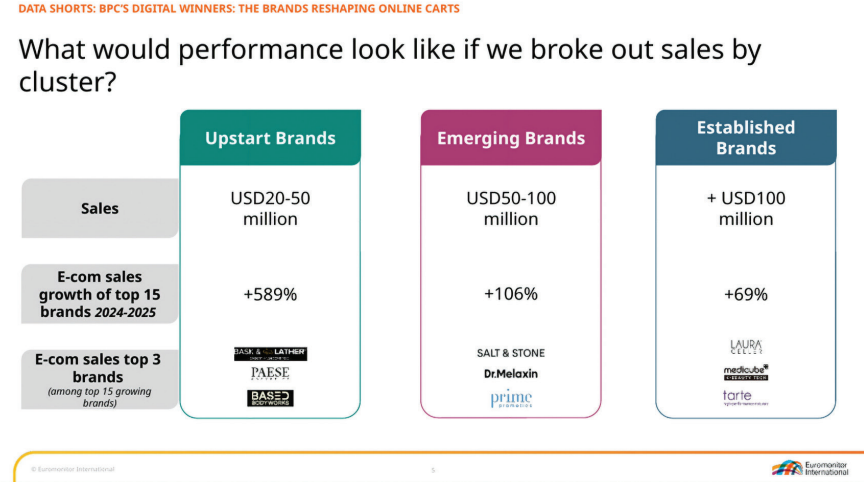
Their growth strategy centers on optimized listings, high consumer ratings, and Prime Day promotions, combined with science-backed formulations and transparent ingredient communication. Salt & Stone leads with clinical proof points and clean ingredient lists; Dr. Melaxin has built a dominant position in facial care through TikTok-driven virality that funnels directly into Amazon search rankings.

Upstart Brands

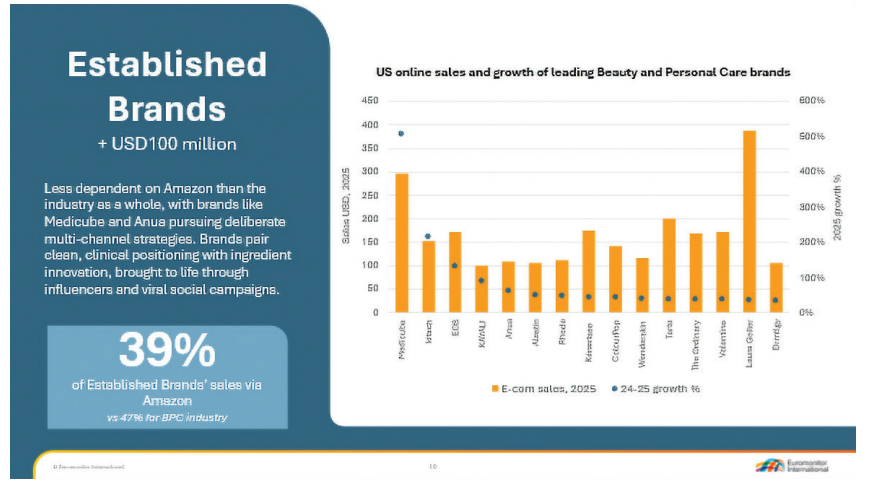
Upstart brands (**F-6**) achieved the most dramatic growth of all: +589% in aggregate. Brands such as Björk & Berries (Swedish eco-luxury, vegan organic), Paese (professional-grade Polish cosmetics) and Tallow Balm (ancestral wellness, animal-derived ingredients) represent niche propositions with globally sourced appeal.

Crucially, only 27% of their sales passed through Amazon; the majority flowed via TikTok Shop and brand-owned Shopify stores – channels that reward novelty, story-driven content and community-level engagement.

F-3 E-commerce sales growth by brand cluster–Upstart, Emerging and Established, 2024–2025 (Euromonitor International)



F-4 U.S. online sales and growth of leading Established BPC brands ($100 million+), 2025 (Euromonitor International)



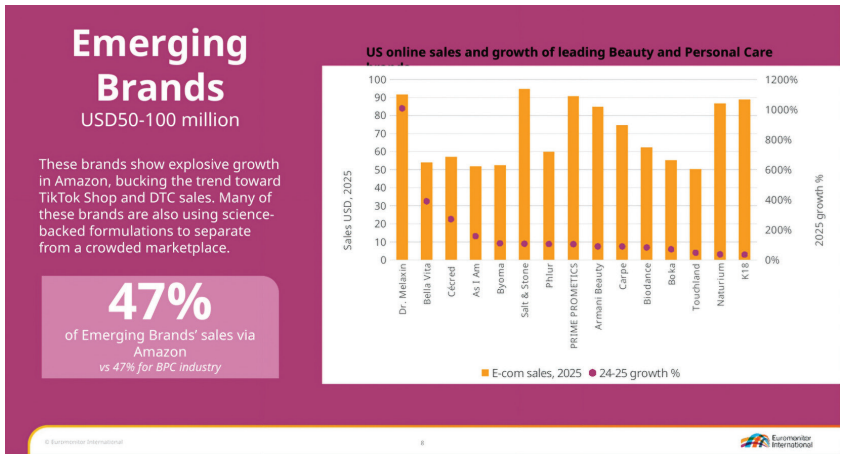
Category Leaders: Who Is Winning Where It Counts

The top six BPC categories—facial care, facial makeup, women's fragrances, conditioners and treatments, eye make-up, and body care—accounted for approximately 50% of total U.S. online BPC sales in 2025 and grew collectively at 15% (**F-7**). Within each category, the fastest-growing individual brands far exceeded those aggregate rates, often by multiples: Eos grew body care sales by 113%, Prime Prometics grew eye makeup by 99%, Kayali grew women's fragrances by 84%, and Dr. Melaxin grew facial care by 639%.

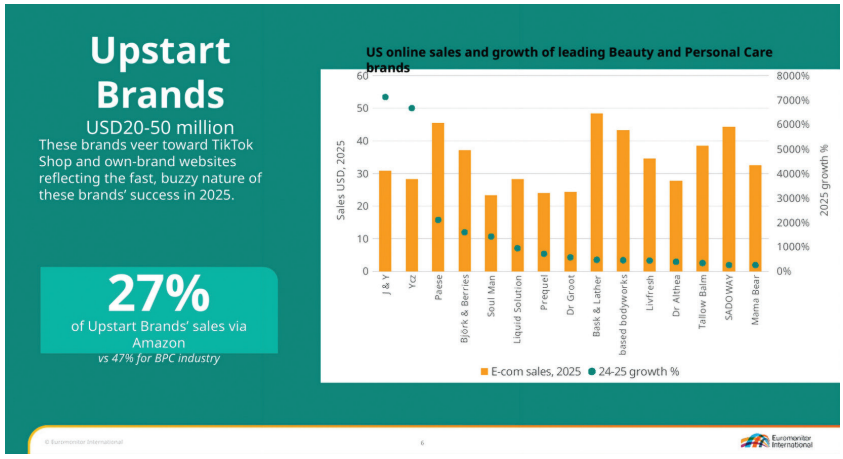
The pattern consistent across these category leaders is a reliance on credible, professional-grade influencer marketing—not mass

Courtesy of Euromonitor International

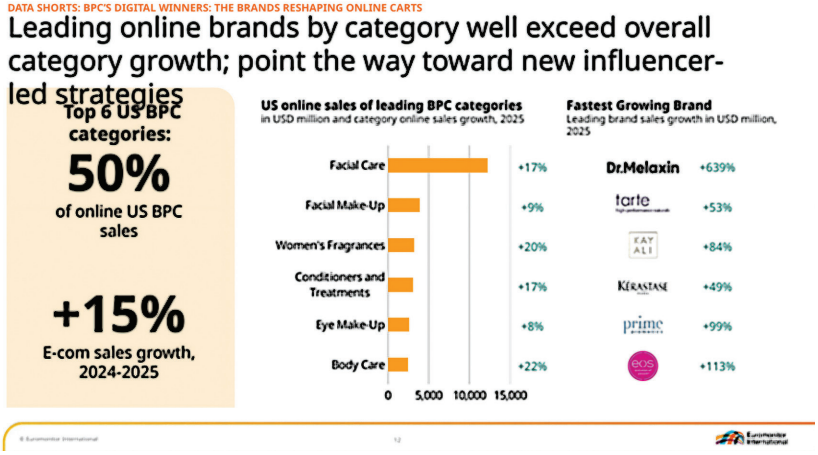
F-5 **U.S. online sales and growth of leading Emerging BPC brands ($50–100 million), 2025 (Euromonitor International)**



F-6 **U.S. online sales and growth of leading Upstart BPC brands ($20-50 million), 2025 (Euromonitor International)**



F-7 **U.S. online BPC sales by top category and fastest-growing brand per category, 2025 (Euromonitor International)**



celebrity endorsements, but targeted engagement with dermatologists, aesthetics and beauty educators who can translate ingredient science into consumer desire. For manufacturers and ingredient suppliers, this dynamic has meaningful implications: the brands winning online are those whose formulation stories are legible and shareable.

The New Conversion Chain Driving Beauty's Next Wave

The structural drivers of BPC's digital acceleration are not easing. As more of the beauty discovery journey shifts online, brands are prioritizing digital engagement tools—virtual try-ons, AI-powered personalization and mobile-first shopping experiences—to meet consumers at every touchpoint. TikTok has cemented its role as a discovery channel, and its influence on Amazon search rankings means that virality on one platform now directly monetizes on another.

Three categories are set to lead growth in 2026 through product innovation: deodorants, oral care and hair care—categories where the intersection of functional claims and lifestyle positioning has proven highly effective in driving online conversion. Companies whose product portfolios are more weighted towards personal care are also expected to turn to social commerce platforms as a primary growth lever. Brands operating in these spaces, and the suppliers that support them, would do well to ensure their digital infrastructure is built for the pace of change that the last 12 months have demonstrated is now the norm. ■

**Data sourced from Euromonitor International's Passport e-commerce analytics. Analysis by Olivia Stelmaszczyk, consultant, beauty and personal care, and Matthew Oster, head of health, beauty and hygiene insights.*

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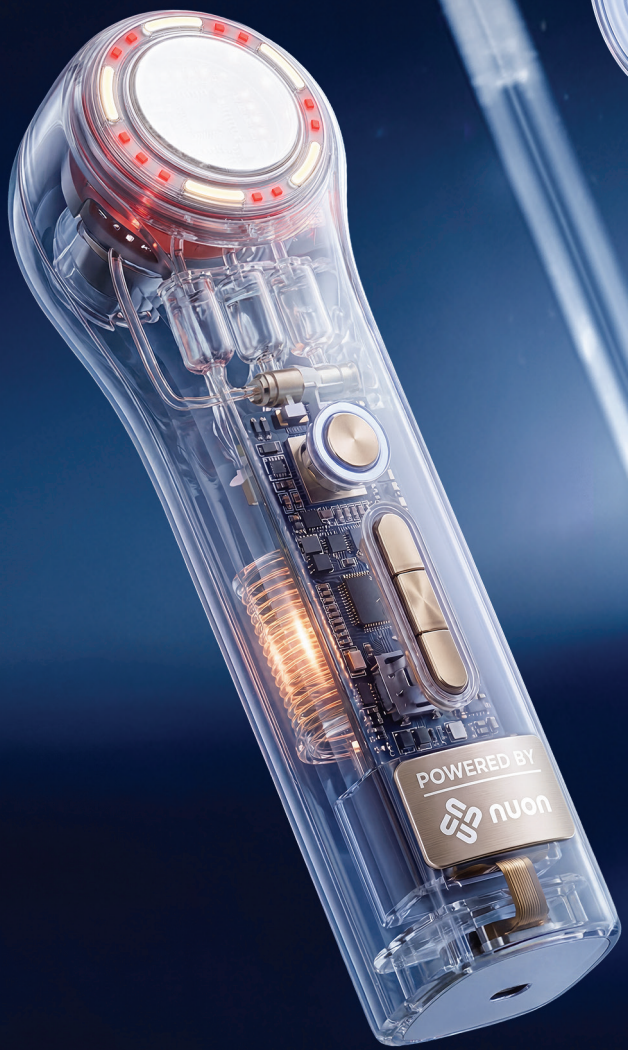
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