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# The Same, but Different

“I’m too excited to eat.”  
 These are the words of a fully vaccinated West Virginia nursing home resident<sup>a</sup> as she returned to her favorite dining room table for the first time since the outbreak of the COVID-19 pandemic.

Indeed, one expects many people around the world will experience this sense of relief and exhilaration in the coming months as they slowly return to the world. But we must also recognize that they will return to a life that has fundamentally changed.

When I survey the industry from this stage of the recovery, I see an industry that is recognizable but, in many ways, wholly reformed. In the last 14 months some beauty fundamentals have remained or even intensified (sustainability, ethics, clean claims, etc.) while others have changed, perhaps forever (meaningful inclusivity, e-commerce/brick-and-mortar dynamics, supply chain resilience, etc.).

To illustrate just one example of the new beauty reality: As detailed in our upcoming April feature on the state of beauty in 2021, NPD reported<sup>b</sup> that 2020 U.S. prestige beauty sales totaled \$16.1 billion, a 19% drop from 2019. In fact, per NPD data, 2020 shaved five years of incremental sales progress from the U.S. market. China, on the other hand, grew 71%, per e-commerce tracked by NPD.

Even as the United States slowly emerges from the pandemic, China—powered by recent regulatory reforms concerning animal testing requirements—is poised to further accelerate its beauty market ascendancy.

Coming April 21, we will partner with NPD to offer a free briefing for brands seeking to expand into or optimize their business in China. Led by NPD’s Samuel Yan, “Prestige Beauty e-Commerce in China, 2020-2021” will provide insights into top-performing beauty categories and future market prospects. Be the first to know when registration opens by signing up for our daily newsletter at [www.gcimagazine.com/newsletter](http://www.gcimagazine.com/newsletter).

Looking further out, *Beauty Accelerate Virtual* will return October 19-21, 2021, focusing on the theme of “Beauty Resurgent.” While 2020’s event was all about the implications of the pandemic, this year’s event will feature newsmaker brands and retailers, R&D innovators, and beauty industry thought leaders discussing post-pandemic growth opportunities and strategies.

Sign up via the link below<sup>c</sup> to be first on the list to learn about speakers, special features, show discounts and more.

Looking ahead, it appears that the world will never return to “normal,” in many ways for the better. Instead, beauty has a historic, unprecedented opportunity to rebuild an industry that is more sustainable and which benefits all people, from the smallest natural ingredient producer to under-resourced BIPOC entrepreneurs to the many overlooked consumers who too often have been left behind. I can’t wait.




*Beauty has a historic, unprecedented opportunity to rebuild an industry that is more sustainable and which benefits all people, from the smallest natural ingredient producer to under-resourced BIPOC entrepreneurs to the many overlooked consumers who too often have been left behind.*



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# INSIDER INSIGHTS:

# 8 INGREDIENT TRENDS FOR 2021 & PACKAGING'S NEW NORMAL

The pandemic has shifted what consumers look for in their beauty products.

*Beauty brands are creating eco-friendly and innovative ingredients in 2021.*

## Featured insiders...

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Evonik

Givaudan Active Beauty

Grant Industries, Inc.

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**B**eauty brands, now more than ever, are pressured to prove that they are providing natural, sustainable and effective ingredients in consumers' favorite go-to products.

We reached out to industry insiders to gauge how the various beauty categories are adapting to consumer needs and what recent launches and services reflect those trends.

## 1. Upcycled ingredients

“As sustainability and the zero waste movement continue to gain momentum in personal care, we’re seeing an increase in innovative upcycled ingredients,” says Jennifer King, director of marketing, cosmetic ingredients at Symrise. “This process of upcycling elevates components of materials that would otherwise be discarded, and repurposes them for beauty care products. These responsibly sourced ingredient stories are appealing for conscious-minded consumers.”

King continues, “Symrise Cosmetic Ingredients has partnered with our flavors division, a key producer for the fruit juice industry, to introduce three new upcycled oils for 2021. These oils are created via sidestreams from the food industry by repurposing the discarded fruits to create a new collection of oils for the personal care market. Symrise Cosmetic Ingredients is excited to launch this new collection of sustainably sourced, fully traceable oils including pomegranate, sour cherry and pumpkin. In addition, Cranberry 360 is another collection of upcycled oils and extracts.”

Arnoldo Fonseca, marketing manager, Evonik, says, “For the first time in many American consumers’ lifetimes, they experienced the feeling of scarcity as they stared into empty shelves at stores during the start of COVID. This has helped usher greater

“Upcycling is a very important trend which is on everyone’s lips.”

—Magali Borel, senior product line manager, IFF Lucas Meyer Cosmetics

consideration for concepts like the supply chain of products and ultimately to consideration of sustainability and side-trends like upcycling.”

Fonseca continues, “Late last year, Evonik launched a new line of botanical active ingredients under the TEGO Natural brand, and some of these ingredients conform to the upcycling trend. For instance, our TEGO Natural Citrus consists of phytochemicals relevant for cosmetics, like luteolin extracted from leftover peel ‘waste’ from tangerine cultivation.”

Pauline Martin, operational marketing and communication manager, Givaudan Active Beauty, says, “As waste reduction becomes more obvious in day-to-day lives, more global consumers will scan their daily routines, including beauty ones. Actually, cosmetic products containing recycled or upcycled ingredients are already appealing to consumers since according to our CMI Global Study, 69% of them show an interest, mostly in Brazil (80%) and China (74%).”

Givaudan Active Beauty has launched a full collection of nine upcycled ingredients since last October.

Magali Borel, senior product line manager, IFF Lucas Meyer Cosmetics, says, “Upcycling is a very important trend which is on everyone’s lips.

Consumers, being aware it is needed to protect the planet and its resources, are more and more attracted by cosmetic products using upcycled ingredients.”

Borel continues, “Regarding the upcycling trend, we have recently launched Borēaline Aurora. It is an upcycled white pine bark extract from the Canadian boreal forest. It acts on three different parameters of complexion (pigmentation, inflammation, protein carbonylation) to give clear and even skin for an optimal luminous look. Borēaline Aurora illuminates true self in only 14 days.”

## 2. Microbiome innovation continues

“We see fermentation and fermented ingredients experiencing a resurgence,” says Stan Djurich, technical sales manager, Bio Component Research. “Not just yeast-based fermentation, also probiotic-based fermentation. I think people are reconnecting with fermenting foods, finding creative outlets while being at home more than usual, and also trying to include nutrient-dense foods into their diets. There is a greater link and increasing research on the connection between gut health and skin health, and

nutrition has always crossed over into personal care. Probiotic fermentation can add a unique story and improved efficacy to actives that are staples in personal care. We've seen the nutritional benefits of probiotics carry over into personal care a few years ago, and with customers making connections between probiotics and health and wellness, there will only be an increase in the need of probiotic fermented ingredients in personal care. But probiotics will really move forward with a focus on postbiotics, the beneficial material the probiotics generate. Postbiotics are why probiotics are so beneficial. Probiotics feed off the nutrients available to them, and produce beneficial postbiotic compounds, such as AHAs. Probiotics generate different compounds in regards to what they are 'consuming,' or being fermented with. It is these postbiotics that I believe will really increase the awareness and benefits of using probiotics in personal care."

Djurich continues, "We initially launched the Bio-Hacked BCR line of probiotic fermented ingredients two years ago, noticing the initial trend of probiotics beginning in personal care. The Bio-Hacked BCR line uses probiotic fermentation to generate intelligent postbiotic ingredients. The postbiotic broth that is generated after fermentation contains a rich assortment of nutrients and actives that enhance cosmetic formulations. We recently performed a clinical trial on one material, DermaSpring IQ, and results were amazing. We were able to display both an immediate effect and prolonged benefits in cosmetic preparation."

Fonseca says, "Fermentation, probiotics/post-biotics, and other non-traditional approaches have created a rich tool-box from which a new generation of ingredients can be generated and the economics of such approaches, in view of overall market demand, are now making these approaches mainstream. Through its launch in 2019 of its Rheance One glycolipid, Evonik has brought



*Oh, Oh Organic's USDA Organic and Fair for Life rosehip oil is a sustainable ingredient offered for cosmetics.*

fermentation-based surfactant solutions to commercial scale, and even in 2020 have continued to be recognized through awards for this technology. Evonik has plans to continue to leverage these capabilities for product development in the future. In the skin microbiome area, Evonik's Skinolance *Lactobacillus*-based ingredient is continuing to see some interest."

Kate Drummond, head of marketing, BASF Personal Care North America, says, "Interest in the microbiome isn't going away any time soon. During the pandemic, consumers were even more interested in the interplay of the bacteria that live on our skin and our scalp and how that balance contributes to healthy skin and hair. It's healthier to focus on the balance of bacteria than to indiscriminately wipe them all out, and many consumers are fully on board with the science behind this trend."

Drummond continues, "Scalposine is a recent launch focused on microbiome. BASF research found that people with an oily, uncomfortable scalp have a much lower diversity of healthy bacteria on the scalp than those with healthy hair and scalp.

We identified six key strains of beneficial bacteria that are signatures of a healthy scalp. We found that study participants who used a pre-shampoo scalp mask containing Scalposine saw dramatic results in scalp health. After one month, the diversity of beneficial bacteria on the scalp improved, effectively resetting the scalp microbiome. Scalposine is a nature-identical amino acid derivative, sarcosine, which is essential for the growth and regeneration of healthy cells."

"Consumers are in search of skin microbiome-friendly multifunctional products that are backed by solid science," says Ratan K. Chaudhuri, Ph.D., president and CEO, Sytheon Ltd. "Based on solid mechanistic studies, Synoxyl AZ (acetyl zingerone) has been shown to maintain skin microbiome diversity and clinically validated skin benefits via multiple pathways."

Shaheen Majeed, president-worldwide, Sabinsa Corporation, says, "Ingredients to support, protect and rebalance the skin's microbiota are the trend in cosmetics now. Thus, ingredients to effectively balance the

microbiome is likely to see a huge boom. Synbiotics, probiotics, prebiotic and postbiotic products are promising for this purpose. LactoSpore is one such product from Sabinsa Corporation which is a postbiotic from the probiotic strain *B. coagulans* MTCC 5856 (LactoSpore). It is highly active against significant skin pathogens such as *Staphylococcus aureus*, *Streptococcus epidermis*, acne-causing bacterium *Propionibacterium acne*, as well as against an opportunistic pathogen *Pseudomonas aeruginosa*.”

Borel says, “Skin microbiota is definitively recognized as a healthy skin guardian. It has been studied for a few years and it is not ready to stop as there are still many things to be discovered. Thus, ingredients linked to skin microbiota such as prebiotics, probiotics and postbiotics are very trendy and widely used by brands.”

Andrew Esplugas, communication manager, LipoTrue, says, “At the beginning of [2020], we launched Aeonome, a *Bacillus* ferment obtained from an ancient underwater cave located in Mallorca island, Spain. This active is COSMOS-approved and has a 100% natural content according to ISO16128. The sample was obtained thanks to the collaboration we have with the local Mediterranean Institute for Advanced Studies (IMEDEA) which is established there. Aeonome as novel active ingredient is an agebiotic, prebiotic metabolized by the commensal cutaneous microbiota enhancing the release of postbiotics with anti aging properties.”

### 3. Sustainability is pandemic-proof

Gay Timmons, founder and president, Oh, Oh Organic, says, “As distributors, the two biggest concerns I hear from customers are about transparency and sustainability. They want to tell the story of each of those areas to their customers regardless of whether it is an active or not. To us transparency and sustainability mean that we know who grows the

crops, exactly how they are processed, and both the topical and downstream effects of the final ingredient.”

Fonseca adds, “Prior to COVID, the big ingredient trend revolved around naturality, so much so that the industry struggled to identify even the definition of ‘natural.’ Standards like ISO 16128 have helped provide a baseline for such conversations, but COVID has truly pushed the discussion beyond such end-point naturality measures to a broader sustainability conversation.”

Esplugas says, “Another key trend is the demand of sustainable and ethical active ingredients which are also on the rise. This is a leading trend that emerged a few years ago, that now with the global situation, has revamped and is here to stay. Consumers demand not only sustainable active ingredients, but also a sustainability commitment from all the supply chain. Consumers are on the lookout for more natural and sustainable origins.”

He adds, “LipoTrue as a company has a sustainability policy to ensure that our supply chain and active ingredients produced comply with our sustainability corporate social

responsibility policy. All our active ingredients are characterized and with proven efficacies complying with safety and toxicology standards. They provide the market novel, safe and with high efficacy active ingredients.”

Drummond notes, “From our sustainable rambutan program, we launched three actives for the skin and hair derived from different parts of the rambutan tree. Using not just the fruit, but the leaf and the seed enables us to generate multiple revenue streams that will ultimately benefit the cooperative of growers in Vietnam maintaining the rambutan garden.”

Praan Naturals CEO Anáil Mitra, says, “With our focus on ethical sourcing, we’re really seeing a lot of interest in sustainability and an absolute-win approach to personal care in which the sustainable sourcing of an ingredient results in a win for the environment, a win for the community from which the ingredient comes, a win for the manufacturing partner, a win for the consumer and a win for our vision as a supplier.”

Mitra adds, “Most recently, we launched a sustainably sourced



*Synchronight by Givaudan is an extract of gardenia fruits, specifically crocin, stabilized in a natural deep eutectic solvent. It prevents disruption in the body's natural melatonin production rhythm, even when skin is exposed to digital devices/stress.*

rosewood essential oil, produced from rosewood trees that have been cultivated on plantations owned by local farmers in Peru. Our manufacturing partner educates, supports and works closely with Peruvian farmers and their families. Collectively, they maintain a sustainable and balanced agroforestry system that includes preparing plantation lands to ensure ideal soil conditions, planting rosewood saplings, planting other botanicals that support the system, and caring for all of the trees and plants. To date, they have planted 40,000 rosewood saplings. Their initiative also helps to improve the livelihood of Amazonian inhabitants by providing full-time employment and by helping to stimulate the economy.”

## 4. Protection against blue light

Martin says, “There are also trends related to markets and consumer demands on their needs such as ingredients related to blue light or related to biotechnology. But whatever happens, all trends are interrelated. Because today, if we are launching an ingredient that is scientifically promising in terms of its biotechnology value or significant results, it must also meet the needs for naturalness and sustainability.”

She adds, “Synchronight is a powerful and dynamic ingredient, playing a significant role in protecting the skin to remain youthful and healthy. When the skin is exposed to digital stress such as blue light emitted by electronic devices, the ingredient acts as a shield against external aggressions allowing skin melatonin to play its natural role in regulating the sleep-wake cycle. Activated by the microbiome, Synchronight stimulates skin rejuvenation and preserves the natural skin melatonin release cycle, resulting in younger skin and better sleep.”

Borel says, “Protecting ourselves against environmental aggressions



*Givaudan Active Beauty recently launched New Red 1805 that is a vegan high-performance red pigment to be used in makeup formulations.*

is also a well-established trend. The protection against pollution is widely seen for years in skin care and is now widened to the hair care segment. On the other hand, the protection against blue light, which started to be trendy a few years ago, recently increased with the pandemic situation (lockdown, home office) associated with a higher time spent on screens.”

## 5. Responsibly sourced ingredients

King says, “The clean beauty movement has evolved into conscious beauty, a more comprehensive approach to how ingredients are sourced and the manner in which they affect people and the planet. This trend spans the entire ingredient spectrum, from sustainably sourced skin and hair care actives to responsibly derived botanicals, while also driving conscious solutions for product protection.”

She continues, “An example of a conscious ingredient is SymRelief 100, as it’s made from synthetic bisabolol. This is more eco-friendly as natural

bisabolol can result in deforestation. Another skin care active is SymVital AR MADA, which is crafted from responsibly sourced ginger from Madagascar. In the Symrise product protection portfolio, Hydrolite 5 green is a conscious ingredient as it’s produced via green chemistry, is biodegradable and is created from a by-product of sugarcane production.”

Martin says, “Natural, botanical, vegan and cruelty-free ingredients are an increasing demand by consumers for the skin care industry, but also for the color cosmetic. And we realized really quickly that being conscious and sustainable is compatible with high-performance ingredients. Launched in September 2020, New Red 1805 intends to meet these expectations. New Red 1805 is a vegan, high-performance red pigment to use in makeup formulations. This powder, crafted from the Chinese red radish, *Raphanus sativus* L., offers a sustainable alternative to synthetic red pigments, while creating new possibilities to answer the growing trend for healthier and cleaner beauty.”

“With the rise of consumer awareness, the leading trends I see in terms of ingredients are pointing in the direction of natural, green, botanical extracts,” says Joshua Teo, senior operations manager, Campo Research. “Herbal extracts that were traditionally used by various races and cultures are also trending as consumers look for unique alternatives that connect with their belief.”

Teo continues, “Campo has an extensive range of natural botanical extracts that is well-suited for natural cosmetics. Actives such as Campo Songyi Total Extract 60% for skin brightening and Campo Kinetin 75% Liquid for anti-wrinkle are extracted from mushroom and young coconut, respectively. From a different ethnicity in South East Asia, Campo also has various extracts from Chinese herbs, Malay herbs, Siddha herbs and Okinawan herbs. Last but not least, Campo Plantservative is a broad spectrum natural preservative available in both water and oil soluble that is extracted from honeysuckle.”

Lena Hotaling-McCaffrey, director of sales, Grant Industries, Inc. says, “At Grant Industries we are using a toolbox concept which provides customers formulating flexibility while meeting their consumers’ needs. This includes our new natural launches, Gransense, 100% natural bio-based elastomer gels designed to work with more polar oils typically found in natural formulas improving aesthetics; Granpowder BBP-700, a fused hybrid composite of bio-fermented powder and amino acid derivative that provides soft focus effects and improved sensory especially in high oil load formulas without being a microplastic; and Gransperse, our new natural pigment dispersions.”

Hotaling-McCaffrey continues, “These plant-powered technologies compliment our traditional line of skin safe synthetic products including our new non-cyclic dimethicone-based elastomers with low residual content. These new offerings combined with our conventional product offerings provide formulating tools and possibilities

“**The clean beauty movement has evolved into conscious beauty, a more comprehensive approach to how ingredients are sourced and the manner in which they affect people and the planet. This trend spans the entire ingredient spectrum, from sustainably sourced skin and hair care actives to responsibly derived botanicals, while also driving conscious solutions for product protection.**”

—Jennifer King, director of marketing, cosmetic ingredients at Symrise

to meet all requirements of clean or natural beauty concepts.”

Caren Dres-Hajeski, director of marketing and personal care, Acme-Hardesty, says, “Clean beauty is holding steady as one of the major trends in 2021. It has gained even more steam due to the pandemic and many of the social responsibility aspects that have been highlighted in the past year. Clean beauty has transformed from being about safety to encompassing social responsibility, ethics, inclusivity, and being green. It is a trend that is also here to stay.”

She continues, “Our partner, Sharon Laboratories, recently launched a product called SharoSense Plus 181 N which is a preservative system that, according to the ISO 16128 Natural Origin Index, is 99.6% natural. It is a

broad-spectrum preservative system with superior antimicrobial activity, is water soluble and is compatible with a wide range of formulation types. It is free from all of the bad actors that the clean beauty movement no longer wants to see in their products, such as parabens, phenoxyethanol, formaldehyde donors, halogens and isothiazolinones.”

Delly Dyer, senior marketing manager, beauty and personal care, Univar Solutions says, “It’s been fascinating to watch the consumer-driven clean beauty movement really reshape the industry. The largest shift we’ve seen as a distributor is the demand from formulators for our bio-derived and sustainable materials that have the scientific backing to support their efficacy claims. Our partners



at Dow have recently launched their DOWSIL FA PEPS Silicone Acrylate, which is a truly unique blend of about 40% acrylates/polytrimethylsiloxymethacrylate copolymer in a 100% renewable carrier. It offers fantastic film forming properties, sebum + water + rub-off resistance, and holds an ISO 16128 certification for 60% natural content.”

## 6. Addressing stress-related concerns

Esplugas says, “During these times and meeting the market demand for actives that counteract the effects of stress and bad quality sleep consequences we launched iPeptide—a bad sleep quality biohacker that modulates the exaggerated inflammatory response of the alarmin IL-33 and that acts as a melatonin-like [material]. This peptide prevents the appearance of a tired and unhealthy look with hanging eyelids, swollen eyes and dark circles.”

Drummond says, “Neurocosmetics is a fascinating and growing trend. The idea that a product applied to the skin could have a positive impact on one’s mood or feeling of well-being is extremely attractive, and consumers are looking for this experience. We’ve seen a host of new launches claiming not just skin benefits, but relaxation and stress management. This trend is just picking up steam, and ingredient suppliers are poised to deliver innovation derived from adaptogenic plants and offer unique claims to demonstrate this effect.”

Borel adds, “Well-being, for both mental and body, is clearly still front of mind. An increase in the anti-fatigue claim is observed. Indeed, more and more consumers want to look fresh and rested despite their intense and stressful life. Product segment especially targets women between 25-45 years old since they don’t feel concerned by aging and don’t want to use anti-aging products.”

Borel continues, “Also, anxiety and stress are real concerns. There is a big



*Senseryn from Provital is made from hops and calms and strengthens all the protective barriers of the skin.*

demand for stress-relieving ingredients to fight stress in order to keep a healthy skin. The ‘COVID face’ is even a new term to speak about the visible appearance of stress as a result of the pandemic. Furthermore, cannabis and its derivatives have become the go-to ingredients in the wellness segment of the beauty industry. Being identified as a stress-reducing or pain-relieving plant and being legalized in many countries, lots of products containing hemp are flooding the market.”

IFF Lucas Meyer Cosmetics has launched Rosality, a Damask rose extract that reduces the visible signs of stress and fatigue for an even skin tone and more rested look. It is said to reduce stress-induced skin damage and regulates cell metabolism disrupted by the Stressosphere.

Chaudhuri says, “Another trend/need that has become significant due to the COVID-19 pandemic is stress, which reflects on skin and creates skin imperfections. According to a

recent Mintel study, Americans have experienced more skin troubles during the pandemic than ever before, with top concerns being dryness and itchiness.”

Chaudhuri adds, “Asyntra CBD-Alt is a synergistic blend of Sytenol A (bakuchiol) and Synovea EL (ethyl linoleate) in HydraSynol DOI (isosorbide dicaprylate) has been shown to modulate endocannabinoid system (via FABP-5 and FAAH) and provides skin relief as demonstrated by the reduction in cortisol, a stress biomarker, and other pro-inflammatory biomarkers. A 70-subject consumer study clearly showed multiple skin benefits using Asyntra CBD-Alt lotion, to name a few—hydrated skin, resilient skin barrier, smoother skin texture, reduction in skin redness.”

## 7. Scalp health

King says, “One of 2020’s most influential trends in hair care, skinification of the scalp, continues to

ignite new innovation in the hair care space. As consumers are discovering that a healthy scalp equates to healthy hair, they're seeking ways to add a scalp care product to their hair care routine. Infusing skin care benefits into scalp care has resulted in new scalp care solutions, from scalp scrubs to cleansers to emerging formulations like scalp serums."

She continues, "Two recent launches from Symrise that target scalp care concerns are SymControl Scalp and SymSoft Scalp. SymControl Scalp is crafted from sustainably sourced micro-algae to normalize sebum production and protect hair against environmental aggressors. SymSoft Scalp is a smart complex to reduce itchiness on the scalp, while protecting and strengthening the hair."

Djurich adds, "Hair care, or more importantly scalp care, is on the rise and I do not see it slowing down anytime soon. With increased attention on wellness, maintaining a healthy scalp has become a focus. Scalp care is incredibly important to maintain healthy hair. Fruits and vegetables grow and flourish to be nutrient-dense based on the soil where they grow. Healthy and nourished soil yields healthy and nourishing foods. Customers are identifying this more and more, and scalp care will be a focus for them."

Djurich continues, "BCR has two excellent actives dedicated to scalp health. Much like the fruit and vegetables, our scalp blends nourish the soil of the scalp, improving circulation and nutrient delivery, while also protecting the scalp. The follicle is very similar to stalk. The root of the follicle needs nourishment, and the environment around must be healthy. With Volugro BCR, we were able to display that we can upregulate and down regulate certain genes that improve the environment of the follicle, and improve nourishment. Majestic Mane BCR has anti-pollution benefits, protecting the follicle and the scalp."

Martin says, "Sustainability is a value for Givaudan and all our Active Beauty team. This is why we were proud to

launch Neosalyl, a fully natural and pure substitute for synthetic salicylic acid for skin and scalp in September 2020. Crafted by green fractionation, this powder can be formulated without water as demonstrated by our S3D Powderful, a 11-ingredient clean beauty and waterless concept."

## **8. Maskne, value and other pandemic-driven factors**

Olga Gracioso, marketing director, Croda, says that maskne has become the new normal.

Djurich says, "I also see an increase in unique ingredients focusing on acne-related issues, especially with 'maskne' becoming an increasing issue. Mask use will not be going away anytime soon, and people will be looking for unique and effective formulas to combat this."

Nina Esposito, business development manager, Centerchem, says, "The leading trends in terms of ingredients are any that address sensitive skin and the dreaded maskne many are facing today, as well as ingredients that fit within the cosmeceutical trend. To hone a bit further, in today's climate many are experiencing skin sensitivity that they hadn't in past years and products that help calm and strengthen the protective barriers of the skin are going to bode well in the industry. As far as cosmeceuticals are concerned, as it has become harder to get to those all-important doctor visits that help our skin look younger and more radiant, ingredients in this area that boost collagen and elastin renewal as well as diminish fine lines and wrinkles will fare well."

She continues, "Recently Provital has launched Senseryn. Made from hops, Senseryn calms and strengthens all the protective barriers of the skin by activating the sensory bitter taste receptors which results in making reactive skin more resilient, optimizing anti-dermatitis microbiota, and preventing superinfections and inflammatory consequences."

Danny Goldstein, Ph.D., VP R&D Tagra Biotechnologies, says, "First and foremost, hand sanitizers amongst others are becoming an essential COVID-19 sanitary item. Consumers sought out products that rejuvenated and cared for skin concerns, including products that targeted specific conditions like dryness and acne, or maskne."

He continues, "It seems that customers these days, although they buy less, want to purchase 'better' and there is a redefinition of value that goes beyond just cost. They invest in buying luxury skin care products for their own well-being in an attempt to counteract the negativity felt with the COVID-19. Customers are searching for products containing well-known active ingredients, backed up with scientific research and improved clinical performance. Serums in particular are increasing in popularity. Based on some market research reports, vitamin C and retinol serums have all seen a 20-40% increase in searches during this period."

Reflecting this growing trend, Tagra launched WS SA50, which is a water soluble form of salicylic acid, that allows formulators to design alcohol-free formulations which are not drying and irritating.

Fonseca says, "Skin barrier science has guided much historical development at Evonik, particularly in the area of ceramides. Ceramides are fundamentally important for the quality and health of human skin, and in 2020, Evonik added two new products to this portfolio. Bodyflux Olive is a ceramide complex derived from organic olive oil that is shown to improve epidermal moisturization and resilience. Ceramide III EP MB provides an easy-to-formulate option for those seeking to enjoy the skin barrier benefits of ceramide NP in their products, benefits including recovering from dry skin and improved skin condition. In addition to ceramides, Evonik launched its Tego Sterol line which consists of specialty cholesterol. These molecules can also play an important role on skin barrier integrity and flexibility." ■

# SKIN CARE PACKAGING'S NEW NORMAL

2021 continues to show that consumers take into account how their products are made.



The AGR/JGR series by SamHwa USA features an outer bottle in glass and a refillable system, which has become a trend in skin care packaging.

It's no secret that brands are continuously moving toward innovative packaging solutions that are more sustainable and eco-friendly. While consumers no doubt care about what's inside the physical product, they also certainly care about the outside.

We reached out to industry insiders to get their perspectives on what concepts are thriving in the skin care market based on what consumers look for when shopping for products.

## Sustainability: PCR, Refillables & Beyond

Michael Warford, director, business development, ABA Packaging Corp. says, "The current trend on packaging for skin care, and for pack-

aging components for the entire beauty industry, is for eco-friendly and sustainable options. The demand is strong for the most sustainable primary packaging component options that can be readily and easily recycled, are inclusive of bio-materials/compostable materials/or PCR, and/or can be designed for reuse/re-fill opportunity. We can, and do, provide these options to our many customers, and in response to inquiries we receive daily."

Marny Bielefeldt, vice president of marketing, Alpha Packaging, says, "By far the most dominant trend we're seeing right now is a heightened interest in sustainability, particularly for post-consumer (recycled) plastics. In 2020, Alpha more than doubled our output of bottles

and jars made from post-consumer resin (PCR), and if existing orders are any indication, we'll double it again in 2021."

Bielefeldt continues, "A second trend in sustainability is in the area of source-reduction, or what we commonly refer to as 'light-weighting.' This is when we structurally reengineer a package so that it uses less plastic than the bottle or jar it replaces, but still performs just as well. For example, we recently modified a 32-ounce plastic jar to remove 28% of the plastic, and the new lighter jar performs equally well in drop tests and on filling lines. This not only reduces the amount of plastic required for each bottle, but it can help e-commerce companies qualify for lower shipping rates because it reduces the total weight of

the item to be shipped. We've worked with skin care brands to convert from glass packaging, which is both heavy and prone to breakage, to light-weighted, shatterproof PET jars."

Bielefeldt adds, "For skin care brands, the most common recycled plastic is polyethylene terephthalate (PET), which can be clear, tinted or opaque. We also see a growing number of requests for post-consumer high density polyethylene (HDPE) which is usually an opaque white or other opaque color. We offer bottles and jars made from 100% PCR in both of those resins, and also offer lower PCR percentages for brands that are concerned about the appearance of 100% PCR. We're also very excited to be among the first packaging manufacturers to have launched 100% post-consumer PET and HDPE projects using certified ocean-bound post-consumer resin. Prevented ocean plastic is recycled plastic that's been collected from coastal areas at risk of ocean plastic pollution. The ocean-bound PCR is safe to use for foods, pharmaceuticals and personal care products. The brands we're supporting are launching their new packages between now and Earth Day."

Jim Lemmons, general manager for McKernan Packaging Clearing House, says, "Some new packaging concepts for skin care include reducing waste and being more eco-friendly. While this is a newer trend, especially in the skin care segment, McKernan has been offering eco-friendly options for many years with our precycling program that repurposes new and unused packaging from one industry to the next."



McKernan Packaging Clearing House's standardized packaging.



Threaded neck aluminum bottles are becoming popular for skin care products, per ABA Packaging.

"The mainstream [trend] from last year is sustainability," says Tony Son, general manager of SamHwa USA. "In Korea, somebody says 'beautiful garbage' for cosmetic packaging, [and] this is now [a] common mindset in consumers, especially for the new generation."

Son says that cosmetic packaging is difficult to recycle because of its "decoration and complexity of structure to keep formula longer," but packaging manufacturers are setting plans for a good balance between "sustainability and functionality."

SamHwa USA has recently launched the GR/JGR series with an outer bottle in glass and a refillable system that has a high eco level. The package follows the reduce, reuse and recycle (PCR) method.

### Aesthetic Packaging Still Matters

Lemmons says, "A common problem many businesses face in the skin care industry is getting their product seen and purchased. A majority of skin care products are still sold in mass merchandising stores where they fight for shelf space and visibility. One way to combat this is to have standardized packaging where a business can maximize their product availability per linear foot on a shelf. Another way to help products stand out is by using custom packaging and secondary packaging. However, using secondary packaging is a struggle for many companies who are trying to lessen their carbon footprint,

and custom packaging is often not cost effective unless you are already a major player in the skin care market. Even when looking at some of the major players in the skin care industry, many of them still use standardized packaging because it is economical and allows more product on the shelf, creating a higher ROI."

Son says, "The package should be eye-catching to the consumer and needs to protect the sensitive formula from the outside environment."

Warford adds, "ABA Packaging Corp. has ramped up our offerings of aluminum products due to the positive eco-value of this great material. We offer highly decorated luxurious looking crimp and threaded neck aluminum bottles and cans for fragrance, skin care, as well as personal care products, and the demand is impressive. Small and mid-sized companies, as well as the largest most notable blue-chip brands, are embracing aluminum packaging options for some of their new launches. We can also supply aluminum threaded jar packages and one-piece aluminum caps and closures, as well. Our aluminum bottles and cans are now even available with PCR content. We are seeing higher demand for glass jars and bottles containing PCR content and we are able to supply these in many styles and sizes. In plastics, we can offer bio-resin, PCR, and easily recyclable product options on tubes, bottled jars and closures." ■

## Packaging and Ingredient Innovation



**Skincare Textures**  
Cosmetic Group USA  
[www.cosmeticgroupusa.com](http://www.cosmeticgroupusa.com)

Contact CGUSA to review our entire portfolio of skin care formulas, technologies and textures. Work with the CGUSA team to identify white space and create new skin care forms that offer differentiation for your brand in the market.



**euxyl PE 9010**  
schülke, inc  
[www.schulke-us.com](http://www.schulke-us.com)

euxyl PE 9010 is a cosmetic preservative blend that offers clear advantages. The addition of ethylhexylglycerin reduces the interfacial tension at the cell membrane of microorganisms and improves the antimicrobial activity. The quality of phenoxyethanol allows it to be used in clear gel systems without causing cloudiness.



**AlphaComplete Line**  
Acme Hardesty Company  
[www.ulprospector.com](http://www.ulprospector.com)

Acme-Hardesty's AlphaComplete is a multifunctional active that has been developed in three concentrations to meet different application needs: AlphaComplete Face, AlphaComplete Hair and AlphaComplete Body. A 100% natural product based on bisabolol, the AlphaComplete Line offers anti-inflammatory, antimicrobial, anti-irritant and cell regenerative properties to face, hair and body formulations.



**FDA Colorants**  
Spectra Colors Corp.  
[www.spectracolors.com](http://www.spectracolors.com)

Spectra Colors offers small quantity batch-certified colorants to be used in drop-in formulations. The company's FD&C and D&C dye products are available as powders, with specific colors available in liquid and granular form.



# Suga® Citrate L1C can lower irritation.

**Suga® Citrate L1C can lower the irritation of formulated products.** No matter if you're formulating with sulfates, or sulfate-free, Suga® Citrate L1C is extremely effective at reducing irritation potential in cleansing formulations, without negatively impacting other important attributes.

*Replacing just 1/3 of the anionic surfactant with Suga® Citrate L1C greatly reduces the irritation potential in the Zein test.*

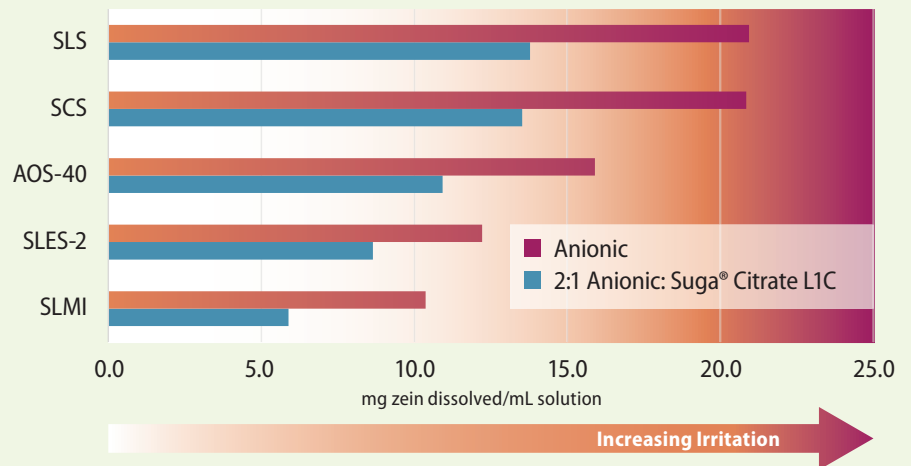
The Zein test is an in-vitro test that measures irritation potential by measuring the denaturation of a proxy protein (zein). As the zein denatures, its water solubility increases. This study demonstrates that substituting just a portion of the anionic surfactant with Suga® Citrate L1C significantly lowers the irritation potential.

In all tests, we used the following model formulation system:

#### Test System

Ingredient	Active
Anionic Surfactant*	7.20
Cocamidopropyl Betaine	1.80
Cocamide MEA	1.00

Irritation Reduction in Formulated Cleanser  
Anionic/Betaine/Amide 7.2/1.8/1.0 pH 5-6



\*Sodium Lauryl Sulfate (SLS), Sodium Coco-Sulfate (SCS), Sodium C14-16 Olefin Sulfonate (AOS), Sodium Laureth-2 Sulfate (SLES-2), and Sodium Lauryoyl Methyl Isethionate (SLMI)

## Suga® Citrate L1C

100% Biobased APG Citrate  
Disodium Laurylglucosides Hydroxypropyl Citrate

For additional information, tested formulations and sample ordering, go to [colonialchem.com](http://colonialchem.com).



# Colonial Chemical

*Innovative Specialty Surfactants*

## PRODUCT ROUNDUP



### Personal Care Manufacturing & Formulation

#### Accupac

[www.accupac.com](http://www.accupac.com)

Accupac helps make some of the world's best skin, oral and hair care products. We design best-in-class formulations and provide continuous support from lab to launch. Learn about what's moving the beauty care industry and how Accupac can help.



### Felt Tip Liquid Liner

#### Lady Burd Cosmetics

[www.ladyburd.com](http://www.ladyburd.com)

These felt tip liners are perfectly suited to provide an array of looks, ranging from precise lines to bold wings. This smudge-proof formula is perfect for all-day wear.



### DermalRx Acetygen

#### Biocogent LLC

[www.biocogent.com](http://www.biocogent.com)

DermalRx Acetygen is a botanically derived active that is produced from *Agrimonia eupatoria* and *Ampelopsis grossedentata*. Cutting edge technology delivers beneficial epigenetic effects. Cellular revitalization, via selective elimination of senescent cells, also known as zombie cells. It protects the skin from premature aging and is a multi-functional "pro-health" skin care active ingredient.

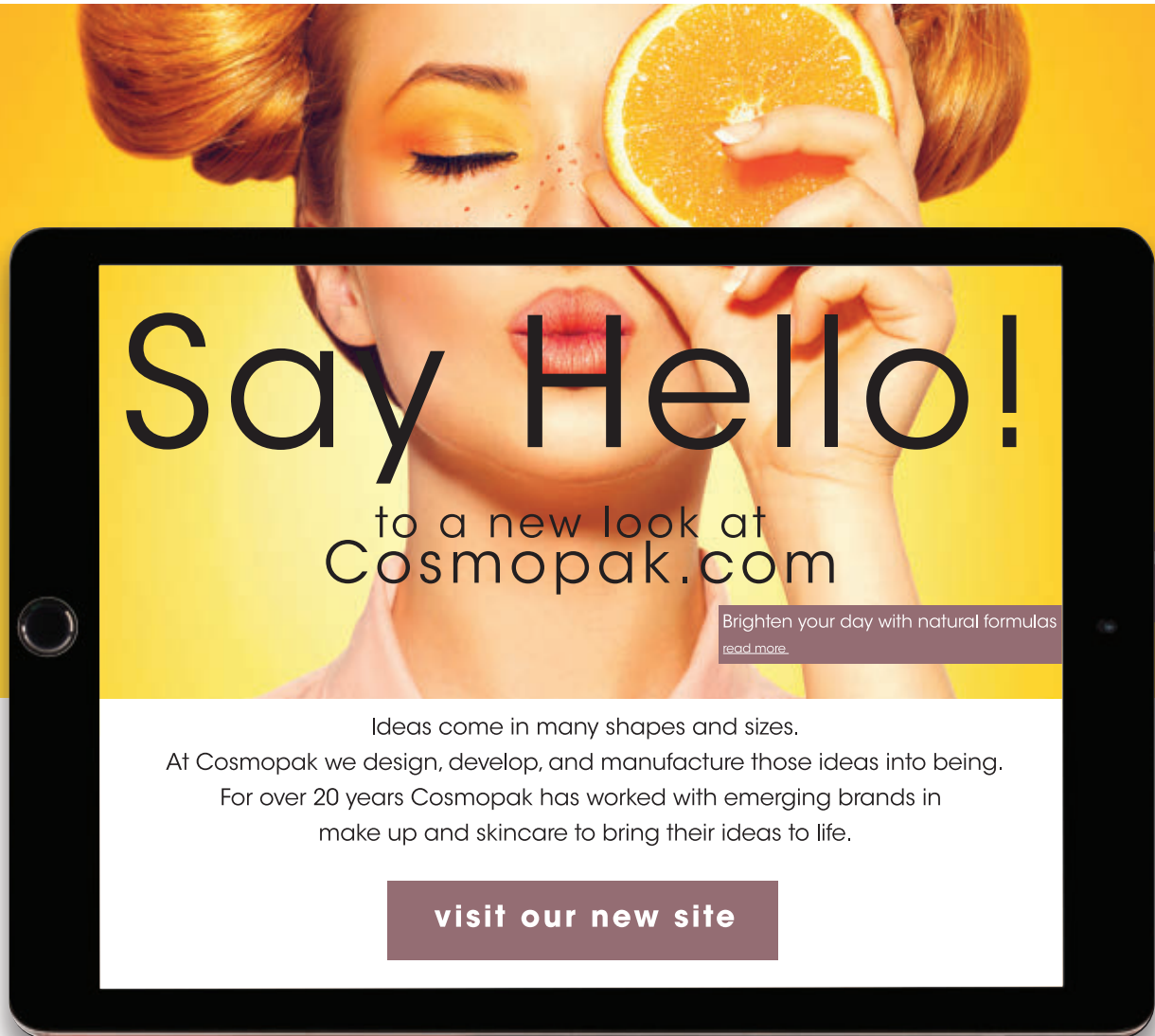


### A Skincare Multi-Tasker: The Ball-Spot Ampoule

#### HCP Packaging

[www.hcpackaging.com](http://www.hcpackaging.com)

The Ball-Spot Ampoule is a convenient airless dispenser for direct application of skin care treatments. The cooling metal roller-ball soothes and gently massages skin for the ultimate efficacy. The push-button at the base releases formula consistently; delivering an optimum dose directly. The portable pen-like format has a twist-lock feature to avoid leakage. The product's capacity is 15 ml and the dosage is 0.1 cc.



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*Skin care in 2021 is diverse, sustainable, targeted, clean and boundary-pushing.*



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# SKIN CARE 2021

**New ingredients, packaging formats and market-driven brand positioning are elevating beauty's self-care leader.**

**U**S. prestige skin care sales in 2020 declined 11%, according to The NPD Group<sup>a</sup>. Key decliners included face cream, face serum and eye treatments, while the majority of growth came from body products such as creams/lotions, exfoliators, cleansers, serums and devices. This reflects the shift in shopper priorities toward self-care. Meanwhile, clinic closures and holds on elective surgeries drove results in at-home microdermabrasion and body sculpting-type products.

Despite the challenges, the most frequent beauty hashtag on Twitter amid COVID-19 was #skincare, and skin-related tweets on the platform numbered 6.4 million throughout 2020, per an analysis by Sprinklr and Twitter<sup>b</sup>.

Looking ahead, skin care appears poised for further resilience and growth in key areas, tapping into consumers' desire for rituals, efficacy and authentically healthy skin. Here, we survey the broad range of insights and brand and ingredient innovations that will define the categories' next phase.

<sup>a</sup>[www.npd.com](http://www.npd.com)

<sup>b</sup>"The beauty in Twitter," <https://marketing.twitter.com/en/insights/beauty-twitter-insights>

## Who is the Skin Care Consumer?

The nature of the skin care shopper and their needs changed over the last year. As reported by Euromonitor<sup>c</sup>, 21% of skin care shoppers purchase on digital platforms. Meanwhile, 41% are seeking personalized solutions tailored to their particular needs. This is reflected in the top five skin concerns, as reported by consumers:

1. Acne-related issues (49%)
2. Aging skin (44%)
3. Lifestyle concerns (34%)
4. Sensitive skin (33%)
5. Hormone-related (9%)

Recently, The Benchmarking Company<sup>d</sup> presented a deep dive into the post-COVID consumer. The company's U.S. consumer surveys found that "the consumer has kept up with their normal skin care regimen during the pandemic. In March 2020, 90% of respondents said they were following their normal skin care regimen, with

<sup>c</sup>Lisa Holmes, "Beauty Survey 2020: Key Insights," <https://go.euromonitor.com/white-paper-beauty--personal-care-20-11-03-survey-key-findings.html>

<sup>d</sup>Denise Herich, "Who is the Post-COVID-19 Beauty Consumer?" Page 12; [https://gcimagazine.texterity.com/gcimagazine/january\\_2021/](https://gcimagazine.texterity.com/gcimagazine/january_2021/)

84% and 85% doing so in May 2020 and September 2020, respectively."

The researchers added, "Eighty percent of consumers said they are trying to find activities that will lower her stress level during the pandemic, with 66% in March 2020 saying taking care of their skin and hair care needs reduced stress. In addition, 80% agreed it reduced stress in May 2020, and 78% said it reduced stress in September 2020."

## Clinical/Efficacy on the Rise

In early January 2021, Larissa Jensen of NPD<sup>e</sup> reported that 2020 sales of natural skin care were, for the first time, eclipsed by clinical skin care, "which ha[s] now become the largest brand type in skin care."

Meanwhile, Lisa Holmes of Euromonitor reported in a 2020 survey: "Dermacosmetics have not only proven resilient in 2020, but certain brands, such as CeraVe and Dr Jart+, are reported to have achieved exceptional results globally and in Asia, respectively. Just as demand for clean and safe skin care formulations has risen, so have preferences for medically backed and clinically proven brands,

<sup>e</sup>[www.npd.com/wps/portal/npd/us/blog/2021/where-beauty-finds-success-in-2021/](http://www.npd.com/wps/portal/npd/us/blog/2021/where-beauty-finds-success-in-2021/)

which are deeply rooted in efficacy and science-backed results.”

The science-backed positioning is particularly successful in categories that require results, including acne treatments.

Consumers are also arming themselves with new tools to easily assess product efficacy. For instance, the What’s in My Jar (WIMJ; <https://whatsinmyjar.com>) platform is designed to help consumers bring science to skin care with an interactive app. The company has tapped into experts in dermatology, AI and science communication to create a tool that consumers can use to look for products that deliver promised results.

The WIMJ algorithm evaluates each product based on two criteria: effectiveness and irritancy potential. It assesses the likelihood that a product will irritate skin based on the clinical and research data available and tells consumers if a product has a low, medium or high irritancy risk. Effectiveness tells the consumer if a product can deliver its promises. WIMJ rates effectiveness on a scale of 1 (lowest) to 100 (highest). The closer the effectiveness score of a product is to 100, the more effective the product is.

- Score between 80-100: This product can deliver on what it claims.
- Score between 35-79: The product delivers some of its claims but will not deliver in full.
- Score between 1-34: This product will not deliver on its product claims.

To evaluate effectiveness, the algorithm decodes the products’ marketing description into a claim of a tangible skin benefit. For example, it decodes the marketing speak of “quenching skin’s thirst” as a simple promise of moisturization.

Some marketing claims such as “energizing skin” or “detoxing pores” are ignored because these types of claims are, per WIMJ, made up by a brand’s marketing department and so the skin’s biology does not align with these claims.



*iLabs has developed a pair of clinical vitamin concentrates that feature eye-catching colors and impactful ingredients.*



*iLabs Clinical Vita Serum Sticks deliver the efficacy demanded by today’s consumers while adding a unique and mobile format that fits easily into daily routines.*

For each product promise, the algorithm scans the product ingredient list in search of substances that can help fulfill that promise. If a product claims to hydrate the skin, the algorithm will look for moisturizing ingredients. Each ingredient is then also evaluated based on the scientific evidence available to support its efficacy. If a product contains an ingredient that has been shown to work in multiple human double-blind controlled studies, it will be rated higher than a product with an ingredient that has only been shown to

have a positive impact in a lab on cells in a petri dish.

In addition to assessing each ingredient against the product’s marketing promise, the algorithm evaluates the product formula as a whole. A good moisturizer, for example, reportedly needs to include a combination of actives with different functions, such as ingredients that bind water or help repair the skin barrier. The algorithm takes this into account, rating the products with better overall formulas as preferable.

Ingredient concentration in the product formula is another factor that the algorithm considers. To be effective, the product must include a certain amount of active ingredients. WIMJ flags ingredients in products that do not meet this effectiveness threshold.

Finally, the algorithm rates products that are formulated to minimize skin irritation risk as higher than potentially irritating products with the same benefits. The reason for this, according to WIMJ, is that even a low level of inflammation caused by irritants can

worsen skin's overall health and is bad for the majority of skin concerns such as aging, blemishes, tone, texture, etc. According to the company, products with relatively lower irritation potential are more likely to bring better skin results, even if the skin is not particularly sensitive.

The WIMJ algorithm assesses skin irritation potential for ingredients in the product formula, considering the typical concentrations used. When collecting the data on irritancy potential, WIMJ relies on ingredients'

safety assessments conducted by reputable bodies such as scientific committees of the European Union (the Scientific Committee on Consumer Safety, in particular) and the Cosmetic Ingredient Review in the United States. In addition, the algorithm examines clinical data such as cases of dermal irritation, which are reported in dermatology publications. The rating goes as follows:

- Irritancy low (green): This product is unlikely to irritate skin and may work well for sensitive skin.
- Irritancy medium (orange): This product may be irritating, especially for sensitive skin consumers.
- Irritancy high (red): This product is likely to irritate the skin.

If WIMJ algorithm flags a product with a medium or high skin irritation risk, it does not mean the product will certainly cause a problem. Rather, it suggests the chance of irritation is higher for the given product. A product with low irritation risk can still cause a reaction, especially if a consumer has a rare sensitivity or has developed an allergy to a particular ingredient. As recommended, it is always best to patch test new products before using them.

Responding to increased demand for efficacious formulas, iLabs has developed a pair of clinical vitamin concentrates that feature eye-catching colors and impactful ingredients. The Ageless concentrate features effective levels of retinyl linoleate (for brightening and anti-aging benefits); a carotenoid complex comprising carrot root extract, carrot seed oil and beta-carotene (for blue light defense and a livelier skin appearance); and vitamin-packed (A,C,E) and ellagitannin-rich cloudberry oil.

The Hyperpigmentation concentrate features tetrahexadecyl ascorbate, a stabilized and active form of vitamin C (for collagen synthesis and skin brightening/ tone-evening), vitamin C-rich dragonfruit seed oil (to reduce redness and inflammation), and



Kimberly Hairston-Hicks (top), founder of Good Beaute' Skin Care (bottom), collaborated with BASF to improve skin care efficacy for all.

hemisqualane (for skin elasticity and suppleness for a smooth, plump finish).

iLabs' Clinical Vita Serum Sticks deliver the efficacy demanded by today's consumers while adding a unique and mobile format that fits easily into daily routines.

The Anti-Aging (Vita-A) stick features technologies found in the Ageless concentrate, such as cloudberry oil, iLabs' carotenoid complex and efficacious levels of retinyl linoleate, as well as hemisqualane (found in the Hyperpigmentation concentrate) and kahai oil, which comprises vitamin E, linoleic acid and natural retinol for improved skin firmness, elasticity and skin resilience.

Meanwhile, the Hyperpigmentation (Vita-C) stick features cloudberry oil, hemisqualane, kahai oil and efficacious levels of tetrahexadecyl ascorbate, offering a vitamin C-rich formulation.

## Making Skin Care More Inclusive

Kimberly Hairston-Hicks, founder of Good Beaute' Skin Care, recently collaborated with BASF to improve skin care efficacy for all. The beauty veteran has held roles with major firms but found herself on the losing end of a battle to get leadership to think about the needs of Black skin in a meaningful way.

When Hairston-Hicks launched Good Beaute' Skin Care, she focused on delivering vitamin C for melanated skin. Still, she felt limited by the known effective range of ingredients in the space. Wanting to venture deeper into the available technology, she engaged BASF to test combinations of existing technologies.

Black skin tends to have higher levels of sebum and lower levels of ceramides. This combination is what creates skin conditions that are simultaneously shiny and dry from moisture loss. By focusing on moisture and mattification for melanated skin, BASF's team was able to focus on a real consumer need to reduce shine while boosting hydration.

Meg Mullen, BASF's marketing manager—actives, North America, noted that, to address the challenge, BASF's team explored its array of ingredients that had previously proven efficacy to see if, in combination, they could offer solutions for melanated skin.

As a result, BASF researchers paired Mat-XS Bright (INCI: water (aqua) (and) butylene glycol (and) sarcosin (and) xanthan gum), which supports skin mattification, with Hydagen Aquaporin (INCI: glycerin (and) glyceryl glucoside), which supports hydration. This combination is COSMOS-certified and provides moisturization that lasts for 24 hours, per BASF, and was even noted by the company to outperform glycerin in consumer trials (all users self-identified as Black). The clinical study yielded a 36% reduction in sebum, a 12% reduction in shine and a 10% improvement in hydration after 14 days.

Inclusive beauty is BASF's goal, said Mullen, and so research continues into other potentially useful combinations to address all skin types. As for Hairston-Hicks, her wishlist for future melanated skin innovations include clean and sustainable materials, as well as organic SPF. She noted that her best-seller is the Vita C Moisturizer SPF 50 and that further consumer education is necessary to communicate the importance of SPF defense for melanated skin. Looking ahead, Hairston-Hicks would like to launch her "SPF 2.0" featuring mineral sunscreen ingredients.

Finally, said Mullen, brands seeking to break into inclusive beauty should follow BASF's lead by consulting with experts to ensure consumers' issues are being addressed effectively.

## Microbiome Claims & Trust

Efficacy concerns are also shaping the microbiome sector. In January 2021, the U.K. Advertising Standards Authority (ASA) cited a paid 2019 Facebook post



*The Ordinary dominates branded searches for exfoliating toners.*

by Boots for Unilever's Baby Dove wash and lotion<sup>f</sup>. The post claimed, "Every baby is born with a unique microbiome, a living layer that protects its skin, nourish it with Baby Dove wash and lotion." The accompanying video claimed, "Baby Dove gently nourishes with prebiotic moisturizer."

ASA ruled that the ad breached rules on misleading advertising and claims substantiation. The organization concluded: "We told Unilever UK Ltd and Boots UK Ltd to ensure that they did not state or imply that their products had a beneficial, protective effect on the skin specifically as a result of their impact on the skin microbiome, unless they held sufficient evidence to demonstrate that was the case."

Trust, as ASA noted, is critical when it comes to the microbiome. In May 2018, Givaudan surveyed more than 1,500 female consumers and found that 8% "were scared by the skin microbiota." Post-pandemic, this number jumped to 27% in a survey of 3,900-plus female consumers<sup>g</sup>.

<sup>f</sup>[www.asa.org.uk/news/skin-in-the-game-an-update-on-microbiome-claims-for-cosmetics.html](http://www.asa.org.uk/news/skin-in-the-game-an-update-on-microbiome-claims-for-cosmetics.html)

<sup>g</sup>Rachel Grabenhofer, "Givaudan Projects Growth in Microbiome Care Despite Consumer Germophobia," [www.cosmeticsandtoiletries.com/marketdata/consumers/Givaudan-Projects-Growth-in-Microbiome-Care-Despite-Consumer-Germophobia-573635651.html](http://www.cosmeticsandtoiletries.com/marketdata/consumers/Givaudan-Projects-Growth-in-Microbiome-Care-Despite-Consumer-Germophobia-573635651.html)

While these statistics seem off-putting toward microbiome-based product development, the company frames it as the perfect forecast for success in 2021. How? Additional numbers from the same studies show that 43% of people reported caring more about microorganisms than before COVID-19. In addition, some 52% said they think, “it is beneficial to use cosmetic products to take care [of the] skin microbiota”—up from 30% in 2018.

These numbers were shared in a presentation given by Catherine Zanchetta, next-generation sequencing senior specialist at Givaudan Active Beauty, and moderated by Pauline Martin, global communications and events manager for the company.

Considering the “27% fearful” statistic, Zanchetta offered, “We will have to deal with this new perception ... by softening it.” To do so, she presented three of Givaudan’s approaches to engage the microbiome: Balance to Enhance, Protect to Care and Trigger to Activate. These were used in the development of ingredients for microbiome care.

Balance to Enhance refers to balancing the microbiota of sensitive skin to reduce immune system activations such as cytokine release. Using 16S rRNA sequencing, the researchers identified the most prominent bacteria involved in skin sensitivity, *Corynebacterium*, and developed an ingredient to reduce its presence.

Givaudan’s Sensityl (INCI: water (aqua) (and) *Phaeodactylum tricorutum* extract (and) pentylene glycol), derived from the microalga, was the result, which reduced levels of *Corynebacterium* and also immune cell recruitment. “This was interesting because it acted on the skin’s ecosystem—the skin cells and microbiota,” said Zanchetta.

Protect to Care relates to protecting the existing microbiota. Under this approach, Zanchetta described the company’s Sopholiance S (INCI: *Candida bombicola* (and) glucose (and)

methyl rapeseedate ferment (and) water (aqua)) biosurfactant, which was shown to be as effective at sebum removal from skin as SLES without causing microbiota dysbiosis.

Finally, Trigger to Activate leverages the microbiome for beneficial effects in skin. The company’s Synchronight ingredient (INCI: glycerin (and) betaine (and) water (aqua) (and) *Gardenia jasminoides* fruit extract (and) maltodextrin) supports this approach by activating melatonin to balance the circadian rhythm.

“The active contains crocin,” explained Zanchetta, “and this is converted by the microbiota to the crocetin molecule, which can bind to the MT1R melatonin receptor ... This triggers the same biological cascade as melatonin for a positive effect on the circadian rhythm.” She

added that the ingredient improves sleep and has been shown to protect against digital stress.

After the presentation, the Q&A session entertained attendee inquiries including whether the actives have been tested in men or on the scalp (answer: no and no), and the mechanisms of action for these actives.

“There are still many questions about how the actives work with the microbiota,” said Zanchetta. “Much is unknown. Some are believed to ‘feed’ them, or the microbes may be more ‘comfortable’ with certain molecules.”

On a final note, she offered conjecture on whether it might be possible to develop specialized cosmetics based on skin microbiome needs: “I think it could be interesting to have actives in makeup that are specific to [different] people,” she said.



Mibelle Biochemistry’s GlowAGE (INCI: *Ziziphus spina-christi* leaf extract (and) trehalose (and) water (aqua)) is a natural active to prevent and reduce glycation in the skin for a rejuvenated and radiant appearance.

## Authentic Aging & Innovation

In August 2017, Allure's Michelle Lee declared that the magazine would no longer use the term anti-aging, providing a high-profile platform for a conversation that had been happening in smaller venues for years<sup>b</sup>. Then, in November 2020, Anthony Gonzalez, Avon's global head of skin care product development, wrote a piece<sup>c</sup> detailing why the influential brand was migrating from anti-aging to authentic aging<sup>d</sup>.

"Age acceptance is rising," Gonzalez wrote, "and as an inclusive beauty brand we believe beauty can be found everywhere—there certainly isn't only one standard of beauty in the world. However, for us, it's not about being anti-aging or pro-aging, it's recognizing that everyone's feelings are different and that neither extreme really allows us as consumers to be perfectly ourselves."

By taking this approach, Avon can innovate for those who respond to anti-aging while also leaving room for those on the pro-aging end of the spectrum. It's all up to the consumer. As Gonzalez concluded, "It's about looking like you, not living up to anyone else's ideals."

A range of brands have stepped into the authentic aging sphere, including Pause, which tackles the impacts of menopause with a trio of offerings—The Hot Flash Cooling Mist, the Collagen Boosting Moisturizer to address dryness, fine lines and wrinkles associated with reduced estrogen, and the Fascia Stimulating Tool to address loss of tone and texture. The brand features its proprietary Pause Complex, comprising vitamins, antioxidants and peptides to help fuel collagen production.

<sup>b</sup> [www.allure.com/story/allure-magazine-phasing-out-the-word-anti-aging](http://www.allure.com/story/allure-magazine-phasing-out-the-word-anti-aging)

<sup>c</sup> [www.avonworldwide.com/beauty-innovation/innovation-blog/anti-and-pro-for-authentic-ageing](http://www.avonworldwide.com/beauty-innovation/innovation-blog/anti-and-pro-for-authentic-ageing)

<sup>d</sup> *The announcement coincided with the reformulation of the core creams of its Anew brand, featuring its Protinol collagen boosters.*



Evonik's *Rovisome Retinol Moist Pro* offers a BHA- and BHT-free retinol with enhanced stability.

Ingredient technology is also advancing to offer new tools to address aging. For instance, Bio-Botanica has launched two materials—Puresterol *Pueraria mirifica* and Puresterol *Pueraria mirifica*, PE (powdered extract)—featuring an herb native to Thailand, where it is used as a "rejuvenator and revitalizer," per the supplier. In particular, *P. mirifica* can reportedly address the symptoms of menopause, including reduction of bone loss and hot flashes and improvement of blood lipid profiles. It is also claimed to support and maintain collagen in the skin and reduce the appearance of wrinkles.

## Trending Skin Care Categories

While skin care sales have been negatively impacted by the pandemic, self-care trends and targeted needs have offered promising areas of growth. Here, we provide a data-driven breakdown of the leading sectors.

### Serums Rule

Spate<sup>k</sup> reviewed 20 billion internet searches between February 16, 2020

<sup>k</sup> [www.spate.nyc/beautytracker](http://www.spate.nyc/beautytracker)

and January 2, 2021 and found that skin care's highest-growth product (search-wise) is vitamin C serum (adding 102,000-plus searches during the survey period). The total serum sector added 187,000 searches during that same period, including more than 23,000 for hyaluronic acid serums and nearly 23,000 for niacinamide serums.

New launches in the serum space include six SKUs from Biohyalux, which caters to a range of skin types and target-specific skin issues using its Hexagonal Hyaluronic Acid Formulation (HHAF). HHAF, which comprises four molecular weights of HA, reportedly replenishes the body's lost reserves. Each molecular weight is formulated to reach different depths of skin to fulfill a range of regenerative and hydrating functions that improve skin from the inside out.

Large molecules are designed to protect the skin's outermost layer, and smaller molecules are designed for deeper absorption into the skin. For example, the third smallest molecule, miniHA small molecular weight HA, gives deeper hydration that promotes cell growth and stimulates cellular activity, further boosting skin elasticity and reducing the appearance of wrinkles.

The serums are packaged in recyclable ampoules and include:

- The Hydro Intense Serum contains creatine, a substance produced naturally in the human body that encourages skin cell repair and helps boost elasticity and softness.
- The Lifting and Firming Serum can be used at the first sign of aging and contains *Bifida* ferment extract and natto extract in addition to a hyaluronic acid cross polymer.
- The Purifying Serum is formulated with salicylic acid and niacinamide (vitamin B3) to reduce excess shine, refine texture and unclog pores.
- Brightening and Boosting Serum is formulated with glabridin, a natural lightening agent that also soothes skin as well as *Anastatica* extract, a potent antioxidant.
- Insta-Rejuvenation Serum contains retinol, *Tuber aestivum* extract and GABA, a non-protein amino acid found in the body which reduces the appearance of wrinkles and fine lines while helping repair damaged skin.

- Soothing Recovery Serum targets the areas in skin that trigger inflammation and alleviates signs of irritation and dryness with the help of ceramide, ectoine and *Chamomilla* extract, which enhances the skin's natural barrier against environmental stressors.

### Masks: Powered by New Tech

According to data from Euromonitor, sheet masks comprised 35% of the face mask market in 2020, up from 22% in 2015. Other top formats include cream-based, gel and peel-offs.

New formats and technologies are emerging to take the category to new heights. According to Weibo Hi-Tech, a China-based OEM, freeze drying and flash release technology have several advantages for beauty, including the maximization of the activity of key ingredients without the need for added preservatives. These techniques can affect the rapid sublimation of water in a liquid serum, thereby maintaining both efficacy and safety.

Weibo features 15 beauty products that leverage the technologies, including seven freeze-dried serums, seven freeze-dried masks and a freeze-dried eye mask.

The eye mask has been nominated for the Cosmoprof Asia Awards. It features Weibo Hi-Tech's freeze-drying and flash release technology, which reportedly preserves an eye serum in a solid state, thereby significantly boosting the activity of its ingredients. The eye mask instantly blends with water to promote transdermal absorption, and reportedly helps firm and rejuvenate the skin.

### Exfoliating Toners: Emerging Opportunity

Spate's data found that, as of late January 2021, U.S. searches for exfoliating toners jumped 67%, year-over-year. The category is dominated by The Ordinary, which spiked in interest in May 2020. That said, much of the rest of the search volume comprises non-branded searches. Spate concluded: "In order to compete in this space, a brand will need to deliver on new formats, claims or concerns. Areas of opportunity include exfoliating toners for sensitive skin, offering gentle solutions, or toners that are exfoliating and hydrating."

### Men's Skin Care: China

As more international brands target the Chinese market, particularly amid eased restrictions around animal testing, brands may want to explore skin care opportunities for men. In a December 2020 analysis<sup>1</sup>, Mintel's Alice Li reported that, "in 2020, Chinese men used 2.3 types of facial skin care products on average, up from 1.7 types in 2017."

Li noted that, because male consumers are function-driven, brands should seek to target prominent issues such as maskne.



SeroVital Beauty has launched a range of skin care treatments targeting mature women experiencing deep wrinkles, skin sagging, dry skin and weakening skin barriers.

<sup>1</sup>"China Men's Facial Skincare Market Has Started Its Transformation," [www.mintel.com/blog/beauty-market-news/china-mens-facial-skincare-market-has-started-its-transformation](http://www.mintel.com/blog/beauty-market-news/china-mens-facial-skincare-market-has-started-its-transformation)



## Skin Care Ingredient Innovation

Despite the disruption of the pandemic, ingredient innovation has advanced, offering technologies that support the key functions and claims consumers are seeking.

### Uncovering Luminous Skin

Mibelle Biochemistry's GlowAGE (INCI: *Ziziphus spina-christi* leaf extract (and) trehalose (and) water (aqua)) is a natural active designed to prevent and reduce glycation in the skin for a rejuvenated and radiant appearance.

*Ziziphus spina-christi* is a thorny evergreen shrub that is tolerant to high temperatures and grows in arid regions where dry seasons can last up to 10 months. The company has derived an extract from leaves of these wild-growing plants.

In vitro and in vivo studies have shown GlowAGE prevents the formation of advanced glycation end products (AGEs) and activates the skin's machinery for the removal of AGEs. It further reduces the expression of the AGE receptor that drives glycation-induced inflammation, the appearance of wrinkles, and the AGE formation and collagen fragmentation in the skin.

Additional benefits of GlowAGE are: prevents and reverses glycation; decreases yellow skin tone; reduces wrinkles and smooths the skin; and restores collagen.

### Hydration/Moisturization Boosters

According to Euromonitor's "Beauty Survey 2020," categories such as moisturizers will maintain or even expand their growth performance. Meanwhile, a Kantar report<sup>1</sup> noted, "Skin moisturizing was initially hit hard by the pandemic. Its strong reliance on Asia meant its sales fell in Q1 [2020] by 2.2% and stayed at that level in Q2, with a 2.3% decline." However, the drop diminished to 1.3% by Q3.

Ingredient innovation is advancing to address growing consumer interest in hydrating/moisturization claims. For instance, Clariant's plant-based Waterin Plus (INCI name: saccharide isomerate, water, glycerin, sodium levulinate, p-anisic acid) moisturizer reportedly mimics the composition of carbohydrates found in the stratum corneum, thereby providing skin hydration as much as four days post-application, per a clinical study. It also improves targets associated skin itchiness and roughness. In a clinical study, per Clariant, Waterin Plus increased skin hydration levels by 12% after 28 days. (Recommended use level: 1-5%).

### Emerging Acne/Maskne Solutions

It may seem a well-established truth at this stage of the pandemic, but

the truth remains: acne and maskne solutions will continue to be key consumer concerns for the long term.

Per Euromonitor's "Beauty Survey 2020," "Google trends show a sharp jump in searches for the term 'maskne' since May 2020, with a significant proportion coming from Singapore, Philippines and Malaysia, given the tropical climate." Therefore, Asia is the top market opportunity for these solutions. Western Europe is the next largest opportunity for maskne claims.

The Euromonitor report concluded, "While the 15-29 age group is the key target, there is ample scope for adult-positioned products which offer other attributes, such as radiance, hydration and firming properties."

A January 2021 report from Trendalytics<sup>2</sup> notes that there are currently 38,000 maskne-related searches per week. Salicylic acid, featuring a 70% year-over-year increase in social media engagement, is benefiting from shopper searches related to acne-fighting ingredients.

Spate highlights another rising star in the acne/maskne universe: hydrocolloid. In February 2021, the company pointed out that, since 2020, hydrocolloid search interest spiked 125.5%. Searches are dominated by COSRX and Hero Cosmetics. Spate in part credits

<sup>1</sup>[www.kantar.com/inspiration/consumer/beauty-and-personal-care-when-will-the-healthy-glow-return](https://www.kantar.com/inspiration/consumer/beauty-and-personal-care-when-will-the-healthy-glow-return)

<sup>2</sup><https://trendalytics.medium.com/top-10-ingredients-to-watch-37dc96365152>



Vantage Personal Care has introduced Liponat Jojoba 20 (INCI: jojoba esters), a vegan, oil-free, COSMOS-certified emollient for sensitive skin-friendly formulations.

the highly visual results offered by hydrocolloid for its popularity.

## Non-irritating Retinol & Retinol Alternatives

Evonik's Rovisome Retinol Moist Pro offers a BHA- and BHT-free retinol with enhanced stability. In formulations, the technology reportedly reduces the appearance of wrinkles and boosts moisturization without inducing skin irritation.

Elsewhere, SeroVital Beauty has launched a range of skin care treatments targeting mature women experiencing deep wrinkles, skin sagging, dry skin and weakening skin barriers. The products all comprise the company's Epidermal Cushioning Technology and purport to offer an effective and gentler alternative to conventional retinol. The core technology pairs 2% retinyl linoleate (a retinol ester) with plant-based epidermal growth factors, two types of marine collagen and anti-aging peptides.

Products in the range include SuddenlySmooth Gentle RetinAl (addressing wrinkles and sagging), TriHydrate Concentrate (addressing dry and less firm skin) and Deep Moisture Recovery Whip (addressing skin barrier integrity).

Looking further ahead, a recent white paper published by Xi Huang, Ph.D., presents what is reportedly a "better than retinol" approach to preempt the production of free radicals in mature skin by targeting excess iron. Huang, who is founder and president of Fe:I Beauty Tech, Inc., claims this technique is at the heart of his forthcoming i-On brand of skin care products, which will comprise de-ironizing inducer (DII) technology. The platform reportedly safely neutralizes excess excreted iron in skin to prevent the causes of aging. Clinical results are set to be published in March 2021.

The technology is relevant to aging consumers because iron storage in skin has been shown to increase during menopause. An iron-reduction strategy could perhaps improve signs



Recently, Positive Products Group launched PPG Natural Malachite Extract (INCI: malachite extract), a liquid extract from malachite stone that promotes healthy skin.

of aging, such as the appearance of fine lines and wrinkles and a lack of skin brightness and firmness.

Huang has claimed that his technology is therefore "bigger than retinol" in that it prevents free radicals from forming in the first place. In contrast, antioxidants including retinol, vitamin E, resveratrol and niacinamide are retroactive, fighting free radicals that have already formed.

## Sensitive-friendly Emollient

Vantage Personal Care has introduced Liponat Jojoba 20 (INCI: jojoba esters), a vegan, oil-free, COSMOS-certified emollient for sensitive skin-friendly formulations. In applications, the material can reportedly help protect sensitive skin and damaged hair. Per Vantage, testing has found that Liponat Jojoba 20 can restore skin hydration levels within four hours and reduce trans-epidermal water loss and skin redness.

The traceable material is derived via a proprietary esterification process from jojoba seeds sustainably grown and harvested on Vantage farms in Argentina and the United States.

## CBD Efficacy & Beyond

CBD has turned up in countless launches in the last three years, but how much do we know about its efficacy across various benefit areas? According to a paper published by Amway researchers in *Clinical, Cosmetics and Investigational Dermatology*<sup>o</sup>, CBD's clinical efficacy and underlying mechanisms of action have yet to be identified and confirmed.

As such, the authors reviewed the latest tangible evidence in the literature (as of the paper's publication on Dec. 8, 2020) related to 12 application areas for CBD. They considered emerging evidence as well as conflicting and/or plausible findings in each area.

1. Skin protection and barrier function: plausible in vitro evidence for CBD related to antioxidant activity, wound repair effects, cell membrane protection against peroxide-induced reduction of PUFAs, and anti-inflammatory

<sup>o</sup>[www.dovepress.com/therapeutic-potential-of-cannabidiol-cbd-for-skin-health-and-disorders-peer-reviewed-fulltext-article-CCID](http://www.dovepress.com/therapeutic-potential-of-cannabidiol-cbd-for-skin-health-and-disorders-peer-reviewed-fulltext-article-CCID)

activities; for example, the activation of PPAR- $\gamma$  and reduction in levels of NF- $\kappa$ B

2. Pain and muscle relief: plausible preclinical evidence for: ingestible cannabinoids inducing antinociceptive effects, and THC and THC + CBD + lower levels of other cannabinoids easing chronic pain
3. Eczema or atopic dermatitis: plausible evidence for CBD's anti-inflammatory effects via various mechanisms; for example, a derivative of the cannabinoid N-palmitoyl ethanolamide (PEA), adelmidrol, was shown effective in treating mild AD in a pediatric population; also, hemp essential oil could impart microbiome-balancing benefits
4. Itch/pruritis: conflicting evidence; for example, THC and PEA cannabinoids reduced itch in murine models but show conflicting results in humans—some studies indicate opposite effects
5. Wound healing: plausible evidence; for example, cannabinoids activate CB1 and CB2 receptors and healing responses in murine models, up-regulating anti-inflammatory

factors, indirectly activating TRPV1 and epidermal growth factor receptors, and inhibiting the fatty acid amide hydrolase (FAAH) enzyme; healing effects in human keratinocytes and dermal fibroblasts have been demonstrated by the whole *Cannabis sativa* extract (the “entourage effect”)

6. Acne/seborrhea: highly plausible evidence; for example, in vitro, CBD acts on sebum production, sebocyte proliferation and inflammation; the authors note that CBD normalizes lipogenesis and prevents pro-acne mediators from increasing inflammation; hemp seed hexane extract and the terpenes in hemp essential oil show efficacy against *Cutibacterium acnes*
7. Modulation of hair growth: emerging plausible evidence; for example, CB1 and CB2 receptors are expressed within the hair follicle, and AEA/anandamide and  $\Delta$ 9-THC have been shown to suppress hair follicle growth and induce the catagen cycle ex vivo
8. Skin and hair pigment regulation: early emerging and conflicting evidence; the authors note the role of the endocannabinoid system



*Exysmol's Scutaline (INCI: Scutellaria baicalensis root extract) is an anti-inflammaging technology derived from skullcap and helps prevent wrinkles and age spots by preventing the appearance and accumulation of senescent cells.*



*Alpin Heilmoor Extract (AHE; INCI: peat extract) from Premium Organic GmbH harnesses and concentrates the power of healing muds.*

- in melanogenesis is not clear; for example, lower concentrations of AEA and other cannabinoids have been shown by some to induce melanogenesis, whereas others have shown agonistic results
9. Oral care : early emerging evidence; for example, early reports suggest *C. sativa* and cannabinoids could serve antiseptic properties against a broad range of pathogenic oral cavity bacteria and their biofilms
  10. Skin infections: plausible evidence; similarly to oral care, CBD and CBG have demonstrated activity against an array of pathogenic bacteria
  11. Psoriatic plaques: conflicting evidence; for example, CBD and *C. sativa* extract have been shown in some cases to inhibit inflammatory mediators whereas in others, only *C. sativa* demonstrated these effects; furthermore, the role of CBD in keratinocyte differentiation is not clear

12. Skin cancer: little if any evidence; the cannabinoids  $\Delta$ -THC and AEA/anandamide show greater potential

The authors concluded that CBD for acne, seborrhea, eczema/dermatitis and skin barrier functioning holds the most promise but more studies are needed. They note that great caution should be taken in exploring areas for modulating pigmentation and hair growth, as any speculative science therein could lead to unwanted opposing effects.

Finally, pushing past the current CBD focus, the authors recommend exploring therapeutic benefits of other hemp phytocannabinoids and botanicals with phytocannabinoid-like activity.

This evolution is already underway in the marketplace. For instance, Amyris, Inc. is launching a new range of Terasana-branded clean beauty products focused on sustainably sourced natural cannabinoids. Most recently, Amyris commercialized a clean, sustainable, fermentation-based CBG (cannabigerol), a non-psychoactive cannabinoid.

Early results from clinical studies reportedly demonstrate that Amyris' CBG skin care applications formulated with natural sugarcane-based Neossance Squalane provide significantly better therapeutic effects and efficacy compared to many standard CBD (cannabidiol) topical applications, addressing conditions like dry skin, skin flaking, irritation, redness and blemishes.

## Ingestible Collagen

Ingestible beauty has been one of the fastest-expanding product categories in recent years, driven by the increasing overlap between the worlds of wellness and beauty<sup>P</sup>. BioCell Technology Company has been in the supplements/ingestibles space since 1997 and offers both ingestible and topical collagen ingredients.

BioCell Collagen for dietary supplements comprises a matrix of naturally occurring hydrolyzed collagen type II peptides, chondroitin sulfate and hyaluronic acid.

"Aristotle once said, 'the whole is greater than the sum of its parts,'" said Suhail Ishaq, president of BioCell. "BioCell Collagen is not a blend of isolated collagen, chondroitin and hyaluronic acid. The complex matrix of molecules found in the branded ingredient BioCell Collagen is clinically proven. Brands that use the BioCell Collagen ingredient in their finished consumer products can substantiate specific structure-function claims based on clinical data that they ordinarily would not be able to make otherwise."

Manufactured in the United States and Germany, the technology reportedly promotes active joints, youthful-looking skin and healthy connective tissues. Specifically, a clinical dosage of 1 g per day is said to reduce the appearance of facial lines, wrinkles and crow's feet, improve skin elasticity and reduce dryness. A 2 g daily dose is purported to boost hyaluronic acid and support joint

comfort/mobility, promote cartilage health and stimulation, as well as synovial fluid health, and, at 3 g per day, boost post-workout recovery.

"No skin care regimen would be truly complete without efforts to rejuvenate the skin from within," said Ishaq. "Incorporating a BioCell Collagen containing dietary supplement with your topical skin care regimen is an excellent idea because it will enhance the results. Cosmetic products only address the superficial layers of the epidermis, whereas ingesting BioCell Collagen works systemically from the inside out."

The company's BioCell Collagen CG (INCI: hydrolyzed chicken cartilage extract) cosmetic grade) topical ingredient is preserved with citric acid and potassium sorbate. The topical also comprises the company's matrix of naturally occurring hydrolyzed collagen type II peptides, chondroitin sulfate and hyaluronic acid, which are essential structural components in the skin dermis and are responsible for the skin's moisture, suppleness, elasticity and beauty. The non-irritating, dermatologist reviewed,



HCP's airless Dropper Ampoule offers controlled skin care dispensing. The PET-based design (cap: PETG; push button: PP; shoulder: ABS) is optimal for facial treatments with active ingredients that target specific skin concerns.

HCP's refillable airless Syringe Ampoule (20 ml capacity), on the other hand, offers a cosmeceutical aesthetic for high-performance and local treatments directed to specific skin care concerns.

<sup>P</sup>"Beauty Inside," Page 57, [https://gcimagazine.texterity.com/gcimagazine/july\\_august\\_2020/](https://gcimagazine.texterity.com/gcimagazine/july_august_2020/)

## BODY BOOM



Trending body lotion ingredients include coconut, shea, cupuacu, acai berry and caffeine/coffee.

According to Cherry Pick<sup>a</sup>, the top-performing body care brands, based on relative percentage of demand for a specific product across social media, are Bath & Body Works, Sol De Janeiro, Iroha, Frank Body, BH Cosmetics, Olay, Florence by Mills, The Body Shop, Balibody and E.L.F.

Products with the greatest demand, per Cherry Pick, included Bath & Body Works' Aromatherapy Body Wash and Foam Bath, Olay's Cleansing & Nourishing Body Wash, The Honey Pot Co's Normal Foaming Wash, Tubby Todd Bath Co.'s Hair & Body Wash, and Native's Body Wash.

### Top Ingredients, Product Claims and Benefits

Cherry Pick offers interesting insights on trending claims across categories, as well as the ingredients social media users are chattering about most.

Top claims across categories include free-from callouts for cruelty/animal testing,

<sup>a</sup>"The Cherry on Top Beauty Report," September 2020, <https://cherrypickai.com>

parabens, fragrance (particularly for body oils), sulfates and phthalates, sensitive skin suitability, vegan status, organic (particularly for body scrubs), oil-free (also body scrubs), and antioxidant activity (for body oils).

Top benefits for body lotion include softening, nourishing, smoothing, evening of texture and firming. Top benefits for body scrubs include smoothing and nourishing, as well as hydrating/moisturizing, rejuvenating, and firming. Top body oil benefits include evening of skin tone, hydrating/moisturizing, nourishing, smoothing and softening. Top benefits for body wash include hydrating/moisturizing, softening, smoothing, rejuvenating and nourishing.

Trending ingredients across categories are as follows:

- Body lotion: coconut, shea, cupuacu, acai berry and caffeine/coffee
- Body scrubs: coconut, vitamin E/tocopherol, vitamin D, vitamin A and superfoods
- Body oil: jojoba, rose, almond, pomegranate and geranium
- Body wash: shea, glycerin, citric acid, tonka and water

### Value-added Hand Care

According to Euromonitor data, 44% of surveyed consumers use hand care products daily, while 40% seek scented options and 22% seek out those that offer sun defense<sup>b</sup>.

As consumers experience the drying effects of hand sanitizers, many are seeking out moisturizing alternatives. In response, iLabs has developed a water-based Alcohol-Free Antibacterial Hand Serum concept. The formulation is designed to quickly kill 99.9% of bacteria, while offering moisturizing and gentle care for all skin types.

The serum is powered by benzalkonium chloride (for sanitizing effects), hyaluronic acid and panthenol (for moisturization and hydration, respectively), *Calendula officinalis* (for antioxidant, anti-inflammatory and antiseptic activity), and *Aloe barbadensis* leaf (for moisturization and anti-inflammatory activity). ■

<sup>b</sup>Lisa Holmes, "Beauty Survey 2020," [www.portal.euromonitor.com/portal/magazine/homemain](http://www.portal.euromonitor.com/portal/magazine/homemain)

allergy tested and non-cytotoxic cosmetic-grade material can be applied in everything from anti-aging to moisturizing products.

## Malachite Beauty

Malachite, a beautiful green copper carbonate hydroxide mineral, can be found in beauty products such as Goop's G.Tox Malachite and Fruit Acid Pore Purifying Cleanser, and Florence by Mills' Look Alive Eye Balm.

Recently, Positive Products Group launched PPG Natural Malachite Extract (INCI: malachite extract), a liquid extract from malachite stone that promotes healthy skin. The extract contains natural bioavailable copper and other trace minerals, which offer antioxidant protection to guard skin against environmental oxidative stress and fight damage to cells caused by free radicals.

The technology also promotes cellular detoxification through the stimulation of glutathione reductase; helps in the synthesis and stabilization of skin proteins; stimulates collagen and elastin production to make skin stronger and more youthful; stabilizes the pH of skin to ensure optimal

compatibility; and provides a beautiful natural blue color in formulations. The ingredient is preservative-free and pending a COSMOS certification.

## Ocean-derived Under-eye Care

Biosil Technologies offers Gelyma's Phyco'derm (INCI: water (and) glycerin (and) *Undaria pinnatifida* extract (and) *Corallina officinalis* extract) offers delicate, non-invasive care for the skin around the eyes. The technology reportedly protects skin cells from free radicals, UV radiation and heavy metals, while improving dermis properties, alleviating the appearance of dark circles and crow's feet, and decreasing under-eye puffiness.

An evaluation by skin profilometry reportedly showed that Phyco'derm was able to reduce wrinkle depth in comparison with a placebo eye gel after 28 days of treatment. An evaluation of color intensity by means of CM-700d spectrophotometer analysis after the 28 days of twice-daily application of a gel with 4% Phyco'derm showed that the technology diminished the appearance of dark circles and therefore increased skin luminosity under the eyes while erasing the appearance of fatigue.

## Exfoliation for Skin, Scalp & Oral Care

Biosil PA, from Biosil, is a COSMOS-approved and NPA-certified water-clear 50% active phytic acid solution (derived from GMO-free corn). The solution provides self-neutralizing activity that yields gentle keratolytic effects and aids in cell turnover, resulting in gentle exfoliation comparable to glycolic acid. The technology, which offers lightening and chelation activity, can be applied to scalp-focused products, as well as peels and masks.

Key benefits associated with the technology include reduction of clogged pores and breakouts, increased collagen production, diminished appearance of fine lines, reduction in dryness and flakiness, and a smoother, more even-toned complexion. Biosil PA



Grove Collaborative's Superbloom range is packaged in vibrant recyclable glass bottles and jars.

is also supplied as food grade and can be utilized in oral care preparations.

## Preventive Anti-inflammaging

Scutalline (INCI: *Scutellaria baicalensis* root extract)—an anti-inflammaging technology derived from skullcap, developed by Exysmol and distributed by Biosil—helps prevent wrinkles and age spots by preventing the appearance and accumulation of senescent cells. The active ingredient, inspired by traditional Chinese medicine, comprises a standardized amount of two polyphenols with anti-inflammatory and antioxidant activity—wogonin and baicalein, respectively. In applications, the technology can offer a soothing effect, combat dehydration, prevent the signs of aging for a younger general appearance, and boost radiance.

## Pollution Defense

Exysmol's Redivine (INCI: grape (*Vitis vinifera*) leaf extract), distributed by Biosil, stimulates microcirculation, antioxidant and anti-elastase activity, and improves astringent activity. Its benefits counteract urban pollution, blue light exposure and



Like a growing number of its peers, Cocokind has announced the debut of new packaging featuring ocean waste plastic, via a partnership with PackTech.

toxin accumulation and prevents cell intoxication and premature aging, per Exsymol. The material is ideal for applications offering anti-pollution, skin detoxification and antioxidative activity, and supporting sensitive skin (dermo-cosmetics) and anti-aging claims.

### Nature-derived Film Former

Ashland's biodegradable Antaron ECo gel provides the easy incorporation of nature-derived water resistance into sunscreens and offers a lighter feel ideal for gel, lotion, milk or spray formulas. The vegan-friendly, translucent and smooth gel comprises a globally compliant ethylcellulose film former based on sustainably sourced wood-derived cellulose. The ethylcellulose was incorporated into a biodegradable sun care solvent to generate a gel that can easily be incorporated into a formula, saving energy during production.

In applications, Antaron ECo gel imparts a soft, light, non-tacky feel. Because the technology is oil-soluble, it can be used in emulsions, clear anhydrous formulations and wet skin products.

### Peat Extract for Natural Healing

Alpin Heilmoor Extract (AHE; INCI: peat extract) from Premium Organic GmbH harnesses and concentrates the power of healing muds. AHE is free of preservatives, water, pesticides and microbiological contamination, per the manufacturer. Available as a dark micronized powder, the material can be used in leave-on and rinse-off products.

In-vitro tests involving HaCaT cells and reconstructed human epidermis have reportedly shown that AHE improves wound healing (by promoting the wound healing factors E-cadherin and paxillin), enhances membrane barrier integrity (by inducing the expression of two different cytokeratines), suppresses skin inflammation (via the suppression of cytokines), and prevents oxidative stress and aging. An open, intra-individual in-vivo efficacy study

showed that AHE had a "pronounced" pro-aging effect, cleansing/anti-pollution efficacy, an immediate and preventive soothing effect, and anti-acne efficacy. AHE also reportedly balanced the skin microbiome of study participants.

### Quercetin: Emerging Interest

Quercetin, a plant flavonol, offers antioxidant activity to combat dark spots and wrinkles, while boosting hydration. According to a Trendalytics<sup>9</sup> report, the material is outpacing internet searches for bakuchiol by a factor of five, with a nearly 300% rate of increase from 2020. The ingredient appears in products as diverse as Mad Hippie's Hydrating Nutrient Mist and Naturally G4U's Balance & Boost—Herbal TLC Healing Supplement.

### Skin Care Packaging

Like ingredients, packaging for skin care is evolving to meet emerging consumer needs and expectations.

#### Targeted Care

HCP's airless Dropper Ampoule offers controlled skin care dispensing. The PET-based design (cap: PETG; push button: PP; shoulder: ABS) is optimal for facial treatments with active ingredients that target specific skin concerns. The Dropper Ampoule works well with low-viscosity formulas, highly concentrated treatments and serums, per HCP. The slim design provides consumers a dosage option, via a twist function, for precise dispensing of 0.15 cc or 0.30 cc doses. To avoid messes and leakage, the Dropper Ampoule features a lockable actuator.

HCP's refillable airless Syringe Ampoule (20 ml capacity), on the other hand, offers a cosmeceutical aesthetic for high-performance, local treatments directed to specific skin care concerns. The design features a

<sup>9</sup><https://trendalytics.medium.com/just-the-data-quercetin-44a932b01e70>



*Skinny Tan has introduced the Notox Beauty Elixir, a smoothing, plumping facial serum formulated for anti-aging effects, skin tightening and a gradual self-tan.*

slanted soft silicone tip to facilitate gentle, targeted formula delivery to the under-eye area. The Syringe Ampoule, true to its name, also offers accurate doses (0.15 cc) for concentrated high-viscosity formulas, including serums and essences. The refillable inner cartridge of the syringe, comprising PP, can be swapped for more sustainable materials. The outer bottle and cap are composed of PETG.

#### Ocean Plastic

Like a growing number of its peers, Cocokind has announced the debut of new packaging featuring ocean waste plastic, via a partnership with PackTech. The launch reduces its reliance on virgin plastic and bioplastics.

Cocokind's new Sake Body Lotion will be the brand's first product to be housed in ocean waste packaging, which features plastic collected from beaches, rivers, lakes and other natural bodies of water in areas such as Jakarta. That plastic is then transformed into pellets that can be repurposed.

The use of ocean plastic for the Sake Lotion SKU alone is projected

to offset 1,654 lb/0.8 tons of plastic from the ocean in 2021, per Cocokind. Production of these recycled resins reportedly uses 85% less energy and emits 75% fewer greenhouse gases than producing virgin resin and overall reduces CO<sub>2</sub> emissions by more than 50%.

“When we decide to use a certain material, we believe that the pros outweigh the cons, especially when compared to their virgin plastic counterparts,” said Cocokind founder Priscilla Tsai. “Understanding the full extent of our packaging decisions is extremely important to our customers, and we hold ourselves accountable in providing this level of education and transparency in order to show true leadership in the beauty industry.”

### Superbloom’s Low-plastic Approach

Grove Collaborative’s latest brand launch, Superbloom, is designed to combat everyday aggressors such as indoor and outdoor pollution, blue light, UV light and dry conditions. The brand’s packaging is 85% plastic-free, per the brand. The products are packaged in vibrant recyclable glass bottles and jars that are housed inside

FSC-certified paperboard cartons printed with no-VOC UV ink.

### Brand Innovations

The packaging and ingredient breakthroughs of recent years has trickled down into the market, as evidenced by a range of recent brand launches.

### Accessible Personalization

EpigenCare Inc., a biotechnology company specializing in consumer epigenetics, has launched a new Standard tier of its Skintelli personalized skin care test. The product, which is a direct-to-consumer DNA test, looks at the current quality of an individual’s skin through epigenetic mechanisms such as DNA methylation.

There are now three options offered: Basic, Standard and Advanced, with the latter of course being the most comprehensive version of the test. The new Standard tier is offered at a \$99 price point, compared to the original version, which was priced at \$399.

The test uses a methylation-specific PCR method that puts particular

weight on skin aging in its algorithm, from which other quality factors can be derived in a cost-effective manner. EpigenCare will also be releasing an iOS app in early 2021.

“We have long recognized that a hurdle to consumers was price,” said William Lee, EpigenCare’s CEO. “With the innovative development of a \$99 solution, we are now more in line with the general DNA testing segment while offering significantly more value by assessing current epigenetic factors as opposed to static genetic predispositions. Combined with accelerated turnaround time, we expect user adoption to rapidly increase in 2021.”

### Non-invasive Filler

Skinny Tan has introduced the Notox Beauty Elixir, a smoothing, plumping facial serum formulated for anti-aging effects, skin tightening and a gradual self-tan. The facial product works as a non-invasive filler to target fine lines and plump the skin without resorting to *Botulinum* toxin or injectable fillers to offer a radiant daily glow.

Naturally derived from butterfly lavender, the elixir contains stoechiol, which reportedly possesses natural wrinkle relaxant properties. This benefit, coupled with a re-densifying and smoothing effect in the epidermis, leads to a reduction in the appearance of expression lines.

The formula is said to include relaxing lavender oil and vitamin E, blended with Skinny Tan’s buildable gradual tan, which adapts to the skin’s natural skin tone for a healthy complexion. Additionally, Notox is formulated with Rahn’s Liftonin Xpress (INCI: hydroxypropyl methylcellulose (and) pullulan (and) *Porphyridium cruentum* extract) to also target facial expression lines for an anti-aging and skin tightening effect. After 10 days of Notox nourishment, consumers perceived elevated elasticity on the face and a visible reduction of wrinkles. This product is vegan and cruelty-free. ■



iLabs has developed a water-based Alcohol-Free Antibacterial Hand Serum concept designed to quickly kill 99.9% of bacteria, while offering moisturizing and gentle care for all skin types (see Page 26).





*Consumers look to brands to innovate and solve problems for which they've been seeking solutions. Ingredient innovation can help to address concerns while creating opportunities for beauty brands to capitalize on her zest to try what's new.*

# CONSUMERS' SKIN CARE INGREDIENT PREFERENCES

Survey data from more than 4,700 U.S. female-identifying beauty consumers on preferred ingredients, interests in new and alternative materials, and more.

| BY DENISE HERICH, The Benchmarking Co.

**N**inety-five percent of U.S. females look for specific ingredients in their skin care products to combat their top concerns, but are they aware of what these ingredients actually do, or are these consumers seeking out ingredients simply because they are familiar with them? Are these shoppers buying into new ingredient promises, or do those hip and trendy ingredients scare them off?

In this article, derived from the results of The Benchmarking Company's February 2021 original primary research study of more than 4,700 U.S. female-identifying beauty consumers, we'll look at:

- the consumer's (from this point forward, "her/she") propensity to buy products with old-school tried-and-true ingredients versus new and trendy ingredients;
- ingredients that she's using now in her skin care products as well as those she's interested in trying;
- her level of awareness of ingredient types;
- her relationship with retinol and the retinol-alternatives she's seeking;
- and what she expects on labels about ingredients from beauty brands moving forward.

Consumers look to brands to innovate and solve problems for

**69% of survey respondents are concerned with protecting or fortifying the skin barrier, perhaps related to over-drying due to hand washing or use of hand sanitizers**

which they've been seeking solutions. Ingredient innovation can help to address concerns while creating opportunities for beauty brands to capitalize on her zest to try what's new.

## Skin Care User Types

Throughout the pandemic, caring for her skin has been a constant for the U.S. beauty buyer. Thirty-eight percent consider themselves to be "intermediate" level skin care users, committed to using three to five skin care products daily; 27% say they're "basic" level users who typically apply up to three products daily, such as cleanser, moisturizer and eye cream; and 34% call themselves "advanced" users, who apply more than five products daily that might include

cleanser, toner, moisturizer, eye cream, treatments, serums, essences, mists, exfoliators and masks.

## Top Skin Care Concerns

Her top skin care concerns include:

1. Dark areas under eyes
2. Fine lines and wrinkles
3. Acne/breakouts
4. Uneven skin tone/hyperpigmentation
5. Sagging skin/skin that needs firming
6. Under-eye bags
7. Large pores
8. Dry skin
9. Dull skin
10. Maintaining youthful-looking skin in general

The five concerns at the top of this list remain constant, although in differing order, across generational lines. For younger women, acne and dark areas under eyes always rise to the top, and for older generations, fine lines and wrinkles are usually the primary concern.

Recent product innovations are bringing new ways to combat some of her “newer” concerns, which include:

- 69% concerned with protecting or fortifying the skin barrier (as it may relate to over-drying due to hand washing or use of hand sanitizers)
- 48% avoiding environmental pollution damage
- 47% protecting her individual microbiome
- 43% inflammation, in general
- 28% avoiding blue light damage (see Page 40)

### Ingredient Search Habits

Forty-nine percent of skin care buyers say they always look for products containing specific ingredients that they believe will help address their skin care concerns, with 45% saying they sometimes check a label for those ingredients, and 5% saying they do not seek specific ingredients out at all.

Touting the use of new ingredients, while educating the consumer about

their benefits, will only enhance a brand’s offering.

### Tried-and-True vs. Hip and Trendy

Today’s skin care buyer looks for a combination of the latest trendy ingredients and tried-and-true ingredients (70%) that have been popular in skin care throughout the past few decades. Twenty-two percent say they look only for tried-and-true ingredients, with 8% saying they’re only seeking what’s hot and trendy.

The efficacy of an ingredient (72%), the fact that the ingredient solves more than one concern (52%) and ingredient safety (46%) are the top reasons she is loyal to tried-and-true ingredients. Loyalty to these established ingredients is not only borne from efficacy but also from habit, an emotional association or a sensorial trigger.

- 32% use products with specific ingredients out of habit
- 11% use a product because her mom/grandmother used it
- 10% say they have an emotional connection to a product/brand that uses a specific ingredient

The most commonly mentioned examples of this emotional connection include ingredients, sensory aspects and products like lavender, Oil of Olay,

Ponds, rose scents, astringents (i.e. Noxzema) and cocoa butter.

Some of the most popular tried-and-true ingredients she’s using now in her skin care products include:

- 55%: antioxidants
- 55%: aloe vera
- 50%: salicylic acid
- 47%: argan oil
- 44%: cocoa butter
- 41%: coconut oil/essence
- 34%: honey
- 31%: lavender

She is also eager to try new products with new and trendy ingredients for a variety of reasons.

- 81% might find something better for unique skin care needs
- 58% new ingredients may be better multi-taskers
- 31% new innovation means the product must work better than what is already on the market

Positive product reviews (65%), better efficacy (45%) and the desire to be one of the first to try a new ingredient (45%) are the top reasons she looks for products with new and trendy ingredients. Other reasons include the ability to understand the ingredient through easy online research (40%), news about the ingredient through social media and other channels (39%),

### T-1. Consumers’ trendy ingredient motivators

Reason for purchasing trendy ingredients	%
There are many positive reviews about products with the ingredient	65%
The ingredient addresses more than just one of my beauty/personal care needs	46%
These new ingredients better address my skin/beauty concerns	45%
I love to be one of the first to try a new product/ingredient	45%
I can find research on the ingredient in clinical claims and/or consumer claims	40%
Ingredient is cleaner, more natural, than synthetic ingredients	39%
I read an article about it/saw it online	39%
I can find a variety of products with this ingredient inexpensively	20%
I believe new ingredients that hit the market are more potent	19%
It is featured in the beauty retail stores/online stores that I shop	17%
It’s trending in social media/elsewhere	14%
Developed in countries like Korea or Japan by skincare experts so ingredient must be good	13%
Ingredient well known to help when ingested/eaten, so it should work topically too	9%

and the general belief that what's new is more potent (19%).

## Trendy Ingredient Awareness and Usage

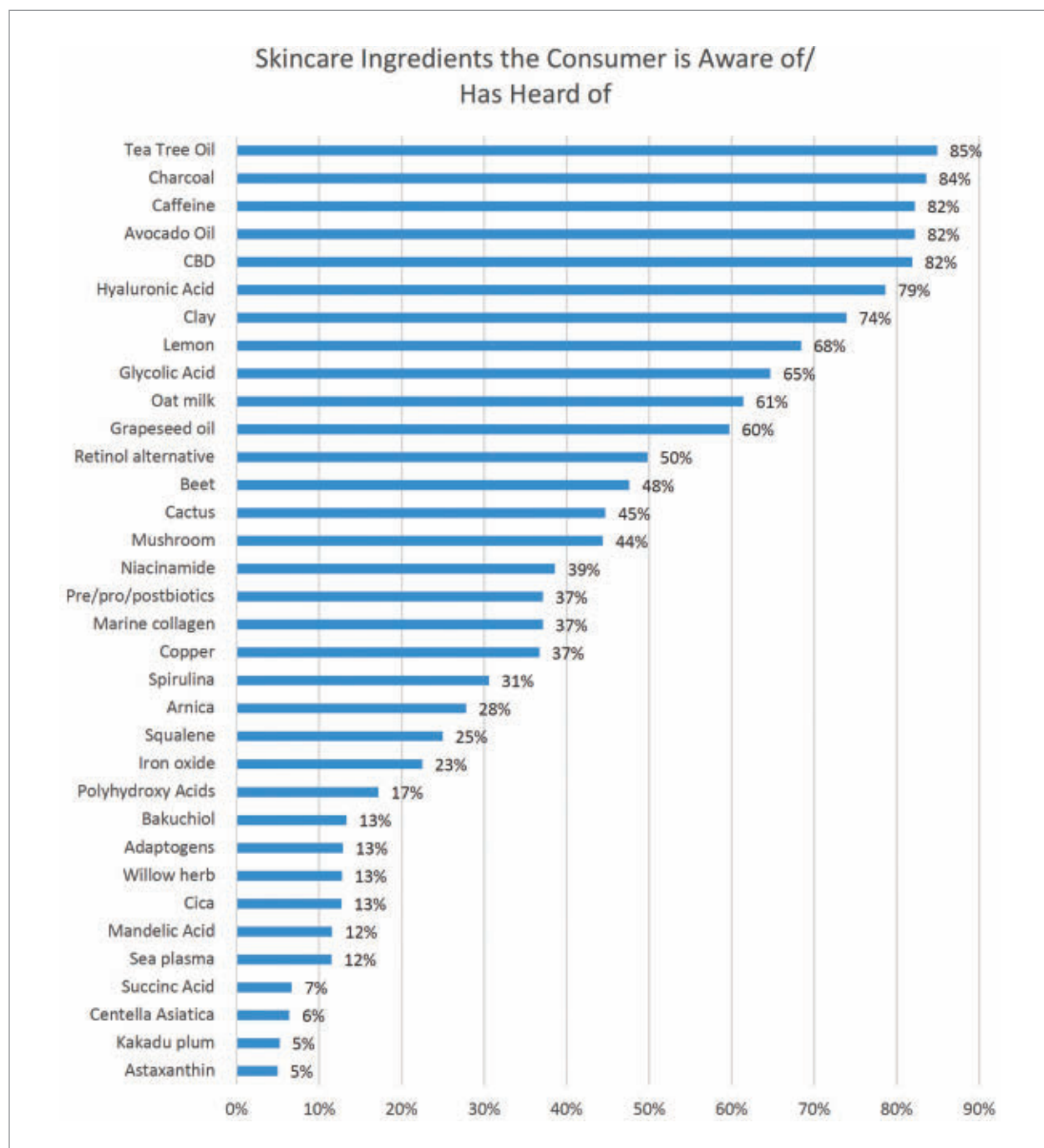
The skin care buyer is more aware of new and trendy ingredients if they're commonly found in nature (T-2). She's

less aware of ingredients that aren't in the everyday vocabulary or sound more scientific.

Ingredient innovation is capturing her attention; even if she's not an early adopter she wants to learn more. Skin care buyers are currently using trendy natural ingredients and would like to try many others (T-3).

Some of the less familiar, yet trendy, ingredients are raising eyebrows among consumers looking for the next product breakthrough. Brands have a sizable market opportunity to bring to light these new ingredients, explain their benefits and capture first-time users. Some of these ingredients include:

### T-2. Trendy ingredient awareness



- Sea plasma (66%)
- Spirulina (62%)
- Bakuchiol (61%)
- Marine collagen (61%)
- Mandelic acid (61%)
- Copper (59%)
- Kakadu plum (59%)
- Adaptogens (58%)
- Willow herb (58%)
- Polyhydroxy acids (56%)

### Vitamin Power

We all know that taking vitamins daily can contribute to better health. But what about applying your vitamins?

Vitamins have become an important part of her skin care product composition. She's most commonly using vitamin C in her skin care products (63%) for benefits of brightening and radiant skin, followed by vitamin A/retinol/retinoids (55%), vitamin E (48%) for more youthful skin, vitamin B complex (36%) and vitamin D (33%). Of vitamins commonly found in skin care products, she's least savvy about vitamin K, with 26% saying she has no idea what this vitamin does to enhance skin care products.

### Retinols and Retinoids

Retinols, retinoids and now retinol alternatives have long been thought of a woman's best weapon against aging.

It's no surprise that it's one of the most sought-after ingredients for fighting the appearance of wrinkles and sagging skin (T-4). But, for many consumers, the word retinol conjures up painful visions of common side effects that outweigh retinol's benefits.

Pro-retinols and retinol alternatives are gaining traction with brands and consumers alike. Surprisingly, the introduction of these products is not cannibalizing the use of retinol; instead, it is raising the profile of retinol and its derivatives.

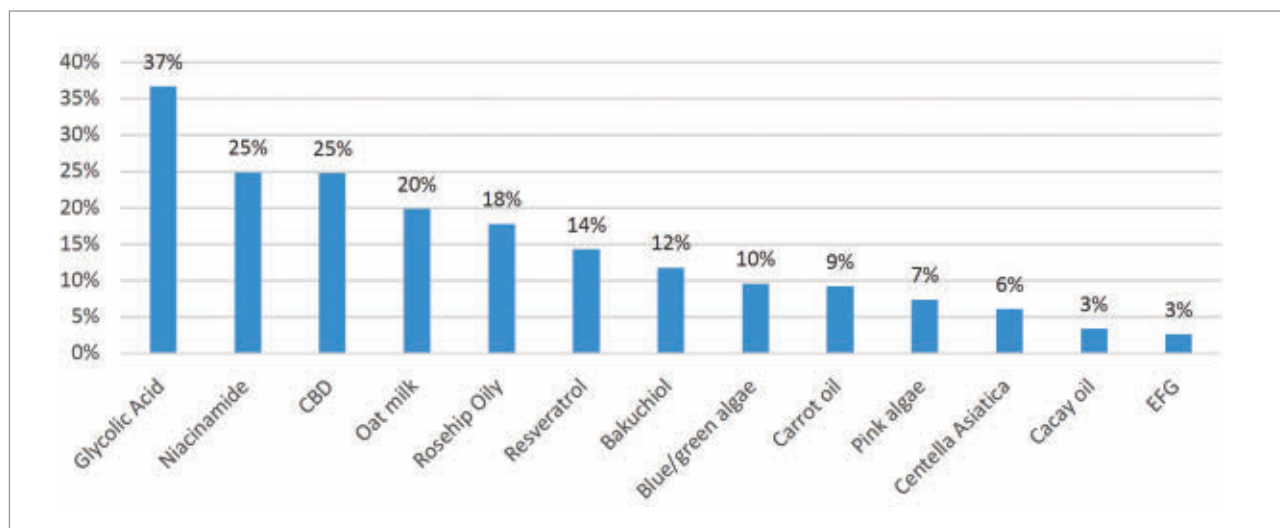
### T-3. Top current skin care in use and top items on skin care wish lists

Currently Use	Don't Currently Use but Would Most Like to Try
#1 Hyaluronic acid	#1 Avocado Oil
#2 Charcoal	#2 CBD
#3 Clay	#3 Oak Milk
#4 Glycolic acid	#4 Caffeine
#5 Caffeine	#5 Grapeseed oil
#6 CBD	#6 Lemon
#7 Avocado oil	#7 Cactus
#8 Retinol alternatives	#8 Beet
#9 Niacinamide	#9 Mushroom
#10 Lemon	#10 Charcoal

### T-4. Retinol use motivators

Reasons she first used a retinol product	%
I was curious	36%
Read about it in a magazine/online/blog/news	34%
I know that it is a potent ingredient	31%
I have a specific skin issue and I thought this would help	29%
I received a sample	21%
A friend recommended it	20%
My doctor recommended it	16%
My esthetician recommended it	9%

### T-5. Retinol alternatives in use



Fifty-five percent of respondents are current users of a product containing vitamin A as a retinol or retinoid, with 11% having used retinol in the past but not currently. Twenty-six percent would be interested in using a retinol product.

Of those who don't currently use a retinol skin care product, 31% say they don't know enough about the ingredient to make a purchase decision. Twenty-four percent believe it would be too harsh for their skin and 19% aren't willing to experience common side effects they believe they might suffer, including peeling, flaking and dry skin.

Twenty-six percent of former retinol users experienced an adverse reaction or irritation to retinol, with 45% of those former users admitting that they did not follow a sensitization protocol while using retinol. Whether respondents followed a sensitization protocol or not, the most common reactions reported (among current and former users) are redness (71%), dry skin (65%), flakiness (47%), a burning sensation (45%) and peeling (45%).

Combatting fine lines and wrinkles is far and away the top reason why respondents currently use a retinol skin care product (75%), followed by addressing loss of elasticity (37%), specific eye-area wrinkles (30%) and loss of collagen (27%). The most popular means of obtaining her retinol product are as a cosmetic product (59%), a prescription-strength product purchased without a prescription (18%), followed by a product prescribed by a physician at 9%.

Curiosity and newsworthiness are the two top reasons she tried retinol for the first time, at 36% and 34%, respectively. Sixty-four percent of retinol users continue to check for the retinol potency on the skin care product label when she buys.

## Retinol Alternatives

Seventy-five percent of respondents say they would be interested in trying a pro-retinol or retinol alternative (T-5), and 16% are already using one. Women are interested in retinol alternatives because they'd like to treat



*Bakuchiol is an on-trend skin care ingredient that appeals to 61% of surveyed consumers.*

the delicate areas of their skin such as around their eyes (61%), they'd like to experience an alternative's gentler ingredient profile (56%), they like that many of the skin care products containing retinol alternatives have strong consumer claims (34%) and clinical claims (28%), and they believe they can be just as effective as traditional retinoids (28%).

Glycolic acid is the most popular retinol alternative ingredient currently in her skin care products (37%), followed by niacinamide (25%), CBD (25%) and oat milk (20%). Nearly one-third of women using a product listed as a retinol-alternative do not know which particular ingredient is the retinol alternative (32%).

Of the ingredients she's not currently using as retinol alternatives, she's most interested in trying oat milk (67%), CBD (67%), glycolic acid (67%), pink algae (58%), blue/green algae (57%) and rosehip oil (56%).

## What Consumers Want from Skin Care Brands

As beauty brands incorporate new ingredients into their products, buyers expect pertinent information at the ready to help them understand how

the addition of these new ingredients will help to make her life better. This information includes benefits of the ingredient listed on package (86%), clinical study results (77%), authentic product reviews on the brand's website (70%), safety statements (70%), and an understanding of where and how the ingredient is derived (69%, i.e., the seed of a specific plant, etc.).

Sixty-six percent of beauty buyers expect brands to test products with new ingredients among consumers like them before they'll purchase. Claims from consumer perception studies are a powerful way for brands to show buyers proof that their new ingredients really will benefit the consumer. ■



**DENISE HERICH** is co-founder and managing partner at The Benchmarking Company ([www.benchmarkingcompany.com](http://www.benchmarkingcompany.com)), which provides marketing and strategy professionals in the beauty and personal care industries with need-

to-know information about its customers and prospects through custom consumer research studies, focus groups, its annual PinkReport and consumer beauty product testing for marketing claims. The company's latest report is The New Age of Naturals, which provides a detailed look at the U.S. beauty and personal care consumers' affinity for natural and organic beauty and personal care products and the motivators and influencers that drive consumers to purchase more natural and organic products than ever before.

# TECH-DRIVEN SKIN CARE

| BY MERCEDES VIZCAINO



*Veteran beauty C-suite executive Joy Chen welcomes the ongoing disruption in skin care purchasing; photo courtesy of Pure Culture Beauty.*

**S**kin care is one sector with an emerging success story amid the pandemic, outperforming makeup and hair products. This trend has been gaining momentum over the last decade as more consumers shift their focus to the health and well-being of their skin, with personalized skin care products taking center stage. According to Clarkston Consulting<sup>a</sup>, next-generation personalized beauty is estimated to reach \$72.5 billion by 2028, up \$34.53 billion from 2019.

In addition, as direct-to-consumer (DTC) skin care brands become the mainstay, even with a post-COVID world on the horizon, many suspect traditional samplings of brands in-store will be a thing of the past.

Veteran beauty C-suite executive Joy Chen welcomes the disruption in skin care purchasing. As a longtime beauty innovator—championing the natural beauty movement by taking the Yes To line from startup to established brand, hitting the \$50 million sales mark during her stint at the company—she was poised for her next challenge: helming the H2O+ Beauty brand as president and CEO. During Chen's tenure at the water-based skin care brand (later renamed to H2O Plus), she revamped the company's business model to primarily DTC and led ground-breaking campaigns empowering women around the world.

Chen's next endeavor proved to be more personal: embarking on a new vision to revolutionize the customer experience. Chen cofounded and funded Pure Culture Beauty<sup>b</sup> alongside Victor Casale, who's the chairman and formula developer for the brand. Casale, with an illustrious cosmetics career of his own, cofounded Color FX and was the former chief chemist and managing director at MAC cosmetics.

<sup>a</sup><https://clarkstonconsulting.com/wp-content/uploads/2020/10/2021-Trends-in-Skincare-1.pdf>

<sup>b</sup><https://pureculturebeauty.com/>



Joy Chen, CEO of Pure Culture Beauty, is shaking up the industry with a science-backed and tech-driven DTC brand.

The pair's science-based skin care line requires consumers to take an at-home test that determines the makeup of their skin's needs based on microbiomes collected, as well as insights into everything from lifestyle to environment, in order to generate accurate personalized results.

I recently chatted with Joy Chen to learn about her motivation to launch Pure Culture Beauty.

**Vizcaino:** What was the impetus to launch a skin care line in an already saturated market?

**Chen:** What I realized about consumers: they know very little about their skin. My experience and I believe others share this, too: You go to a store and somebody looks at your face, skin and say, "I think you have this skin condition and I think you should try these products," or you go to an esthetician and they visually eye your face and give you a qualitative assessment of your skin.

I thought, "There has to be a better way of evaluating someone's skin that's more science-based or data-driven." I partnered with Victor Casale because we both believe there had to be a smarter way—a much more objective way that relies on data to customize and provide skin care solutions to the customer that starts with them first.

**Vizcaino:** What do you think is inherently wrong with the way skin care products are made by large-scale manufacturers?

**Chen:** They focus very much on one-size-fits-all. Their model: "Let me start with one product I can sell the most to everyone." And that model is pretty outdated. We in general have different skin, driven by so many variables—things we do differently, our lifestyles, geography.

The one-size-fits-all doesn't work for today's consumer. The manufacturer (any given big brand) is forced to do what's right for the average consumer.



When they are formulating for the masses they can't target one thing and [thereby] end up diluting what they want to deliver. And it has to service everyone and because they have to do it that way—it services no one.

**Vizcaino:** Having launched a DTC product amid a pandemic, what do you predict consumer behavior will be—once restrictions are lifted in stores? Do you think they'll go back to brick-and-mortars to try out new beauty brands?

**Chen:** Our model is meant to have a brick-and-mortar presence and a DTC component. Launching in the middle of COVID forced us to rely on the latter. Consumer behavior has shifted. Once stores open again, I believe consumers are going to be hesitant to sample products in-store. I would think twice about going to a store and pick up that tester. Given the COVID impact, I would pause on that for now.

We do want a physical presence so we can interact with the consumers one-on-one as well as DTC, but not for the rest of 2021. Our e-commerce offering appeals to consumers right now. There does need to be more education on the consumers' behalf when choosing products, and that I believe can happen more quickly at a brick-and-mortar.

**Vizcaino:** Does Pure Culture Beauty have a social component in their messaging?

**Chen:** The social component messaging is that we have skin care that is probably right for anyone. So much of skin care within the beauty industry has revolved around the cover-up. Covering up what you don't like or covering up what the industry tells you is not beautiful. The social message here is about you feeling healthy and feeling good in your own skin.

The skin care's about how do you bring that glow to the forefront vs. trying to hide it—whether you're trying to hide a birthmark, smiling lines or freckles. Instead of hiding

“ I thought, ‘There has to be a better way of evaluating someone’s skin that’s more science-based or data-driven.’ ”

—Joy Chen

these conditions, let's make sure it's the healthiest skin it could be and let's show it off! Also, our products are gender-neutral, not just for women. We have gotten great feedback from male consumers—since we are able to develop products that are customizable with a broader reach.

**Vizcaino:** What is the role of technology in the future of skin care?

**Chen:** While Pure Culture Beauty is making its mark in the DTC space with a science-based tangible approach to skin care, other brands must contend with adopting a DTC business model to keep up with growing consumer demand for digital efficacy. And, in doing so, they face a new dilemma: [whether to] invest in AI and AR software to proactively meet consumers' evolving beauty personalization needs.

Most consumers are receptive to AI- and AR-powered services. By default, the pandemic has prompted consumers to experiment and become curious about digital tools created to facilitate hyper-personalization, accessible while at home. According to a 2019 Think Google Survey<sup>c</sup>, 66% of consumers are interested in AR to assist with shopping.

L'Oréal is one of the first brands to experiment with AR technology. For the last decade, the brand has been finessing once-glitchy digital tools and

rolling out more sophisticated<sup>d</sup> virtual try-on technologies. Other brands following suit are YSL and Estée Lauder, seeking digital innovation to offset the 20-30% decline in in-store sales the global beauty industry is experiencing, according to Fortune.

Leading the pack in this digital beauty revolution is Perfect Corp., a Taiwanese company founded in 2015, popularizing the beauty app, YouCam makeup, which lets users virtually sample over 300 brands. The Beauty Tech explosion in the last few years, only exacerbated by the pandemic, will continue to disrupt traditional business models for various makeup brands.

So what is beauty tech exactly? As Perfect Corp.<sup>e</sup> describes it: the merging of hardware and software to analyze current skin conditions to provide more precise product usage for the consumer using machine learning and deep learning algorithms. The inevitable question arises: Will all beauty brands be willing to conform (especially the non-behemoths in the space) to the latest beauty tech to stay competitive and meet consumer beauty purchasing decisions? This next year and half will prove to be pivotal in determining whether they'll be successful in doing so, especially for existing and new skin care lines in the market. ■

<sup>c</sup><https://www.thinkwithgoogle.com/consumer-insights/consumer-trends/ar-shopping-interest-statistics/>

<sup>d</sup><https://fortune.com/2021/01/11/ai-artificial-intelligence-personalized-beauty-cosmetics-brainstorm-reinvent/>

<sup>e</sup>[www.perfectcorp.com/business/blog/general/the-complete-guide-to-beauty-tech](http://www.perfectcorp.com/business/blog/general/the-complete-guide-to-beauty-tech)



## SantEnergy™ Energizing hair follicles

SantEnergy™ is a distinctive polyphenol-rich extract that is sustainably obtained by wild harvesting from the aerial parts of the Yerba Santa plant. It energizes the hair from the root through a caffeine-like effect and optimally protects the follicles from oxidative damage. This increases both the hair growth as well as the hair density.

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# BLUE LIGHT & DIGITAL AGING

**The need for protection from the light emitted by electronic screens will continue to expand.**

| BY SNEHA VARGHESE, Future Market Insights



*Intensive research has shown that blue light emissions from laptop and smartphone screens, i.e. light rays of a wavelength of less than approximately 500 nanometers, can have a negative impact on the human body; this is especially true for blue light in the range of 435 to 455 nanometers, which is the light wavelength most commonly emitted by these devices.*

**D**igital aging has rapidly become a watchword in the global cosmetics and skin care industry. The concept of digital aging has its roots in the digital revolution, or what is commonly called the fourth industrial revolution, which has brought about a fusion between the virtual and physical worlds. The digital revolution has rapidly changed our lifestyle habits and preferences, mainly in a positive way. However, it has come with its own set of perils as well. Key among these perils is the impact that technological tools have on the human body. One such area of concern is the impact of blue light emissions from devices such as laptop and smartphone screens on human skin.

Intensive research has shown that blue light emissions from laptop and smartphone screens, i.e. light rays of a wavelength of less than approximately 500 nanometers, can have a negative impact on the human body; this is especially true for blue light in the range of 435 to 455 nanometers, which is the light wavelength most commonly emitted by these devices. Approximately 88% people in the United States alone use PCs and laptops, while approximately 75% use smartphones; this rate is expected to rise further through 2030. These developments have created a huge need for blue light protection products.

### Impacts of Blue Light

The negative effects of blue light emissions range from affecting the release of hormones from key glands to damaging DNA and causing rapid death and shrinkage of skin cells. Blue light has been shown to suppress release of melatonin (in fact almost twice as much as green light), a hormone which is crucial to maintaining skin health. Without going into the medical nuances of the damage blue light emissions can cause, it would suffice to say that blue light

**During the lockdown, with work from home tendencies and increased use of digital tools, the usage of blue light emitting technologies has grown significantly; this trend is likely to endure.**

emissions are on the verge of becoming a leading cause of extrinsic skin aging. As a result, the cosmetics industry has responded to this challenge by innovation and development of blue light protection products.

### Beauty Industry Response

The cosmetics industry has delved into the blue light protection market at an incremental pace and closely followed the rapid adoption of blue light emitting products. Research into blue light protection ingredients picked up steam in the early and mid-2000s, and the industry was consistently developing new and innovative products by the next decade.

Between 2015 and 2019, the blue light protection ingredients market grew at a CAGR of 5.9%. The market's portfolio included an impressive range of products that covered segments such as facial skin care and body care (including creams and moisturizers, serums, gels and oils,) as well as cosmetic products such as foundations, concealers and primers. The sales for blue light protection ingredients is expected to therefore expand, with a forecasted CAGR of approximately 8.3% over the next decade. Furthermore,

considering that the market is already fragmented, this growth is likely to be witnessed at near equal levels by all major market players<sup>a</sup>.

### Accelerated by the Pandemic

During the lockdown, with work from home tendencies and increased use of digital tools, the usage of blue light emitting technologies has grown significantly; this trend is likely to endure. This development is a huge opportunity for the market. It is noteworthy that product launches continued in 2020 despite the economic slump across various key global markets, especially Europe and North America.

One such 2020 launch was Foster's Lab's Anti-Tech Serum, which is formulated to help protect against skin damage caused by blue light exposure from technology. The serum

<sup>a</sup>Editor's note: According to NPD data, U.S. prestige makeup with blue light claims experienced 179% dollar growth January-June 2020, compared to 52% in the same period of 2019. In skin care, blue light claims grew 170% January-June 2020, compared to 104% during the same period of 2019. Source: [www.npd.com](http://www.npd.com); cited in: [https://gcimagazine.texterity.com/gcimagazine/september\\_2020/](https://gcimagazine.texterity.com/gcimagazine/september_2020/)

features active ingredients like cacao seed extract, bakuchiol and a vitamin C booster. The cacao seed extract is reportedly the primary ingredient combating damage from blue light.

## Prospects for Regional Segmentation

A region-wise segmentation of the blue light protection ingredients market shows the close link between blue light protection products and technology penetration, which in turn has a direct link with the prosperity of a population.

For example, Europe, with its high technology penetration, accounted for about one-third, or 11,143,479 kg, in sales of blue light protection ingredients in 2020 (total global volume: 36,353,222 kg). In comparison, densely populated South Asia accounted for only 3,971,800 kg of total sales. Oceania, mainly led by Australia and New Zealand, accounts for less than 10% of South Asia's population, but still saw sales of 2,368,311 kg blue light protection ingredients.

At the same time, the current market dynamics are likely to undergo a shift in the coming years. With development, economic growth and rapid technology adoption in China, East Asia is likely to be the fastest growing regional segment for the market in the next decade (it accounted for 5,304,063 kg sales in 2020). A similar high-growth trajectory remains likely for markets in developing countries in South Asia and Latin America, which accounted for 3,303,095 kg in 2020.

## Consumer Preference Shifts

A marked shift has already been observed in certain consumer preferences from 2015-2020. The most prominent of these is a growing demand for natural blue light protection ingredients, the sales of which had already reached an impressive 13,297,094 kg by 2020, i.e. approximately 36% of global consumption.



*The Foster's Lab Anti-Tech Serum was formulated with cacao seed extract to help protect against skin damage caused by blue light exposure from technology.*

Solid and semi-solid blue light protection ingredients (at a volume of 20,430,398 kg in 2020) command a higher market share than their liquid counterparts (a volume of 15,922,824 kg in 2020); this consumption trend is markedly different from most cosmetic products segments.

Other consumer preferences indicate a strong demand for facial skin care and cosmetic products, which in 2020 sold 15,391,678 kg and 13,265,033 kg; i.e. approximately 42% and 36% of the total global market share, respectively. More specifically, within the facial skin care segment, facial creams and moisturizers dominated with 4,854,509 kg sold in 2020, followed closely by serums at 4,185,765 kg, and facial gels and oils at 3,848,087 kg. Meanwhile, in the cosmetic products segment, foundations were relatively clearer leaders at 5,950,258 kg, followed by primers and concealers at 4,362,314 kg. However, the impact of new product developments and launches has the potential to alter the current market dynamics over the next decade.

## Is Blue Light the Next Big Thing?

The COVID-19 pandemic may actually prove a long-term blessing in disguise for the blue light beauty market. The prospects for the market look bright across geographies. Given these factors, the blue light protection ingredients market has the potential to disrupt the dominant conventional cosmetic products markets over the next decade. As a result, it would not be very farfetched to say that blue light protection products are on the verge of being the next big thing in the larger cosmetics market. ■



**SNEHA VARGHESE** heads the consumer product division at Future Market Insights (FMI), an ESOMAR-certified market research and consulting firm. The insights presented here are based on a study by FMI, "Blue Light

Protection Ingredients Market." Find the full report at: [www.futuremarketinsights.com/reports/blue-light-protection-ingredients-market](http://www.futuremarketinsights.com/reports/blue-light-protection-ingredients-market)

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- Stephenson

*Sustainable, clean and high-performance ingredient technologies are set to take beauty innovation to the next level.*



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# Beauty Ingredient Trends 2021, Part 1<sup>a</sup>

From sustainable rosewood oil to next-generation preservation and color effects, new innovations offer brands unique ways to stand out.

**B**eauty innovation in 2021 and beyond is being driven by consumer attitudes toward “clean” formulations, sustainability, functionality/efficacy and product experience. Here, in the first part of our ongoing ingredient series, we round up some new and notable launches that point to larger trends in the industry.

## Solid Beauty

Solid, waterless formats for all manner of beauty categories have become darlings of the clean and sustainable movement. Suppliers are stepping up to meet the demand.

For instance, Stephenson has launched its first solid conditioning bar. The base is the latest addition to Stephenson’s Melt and Pour range, designed to bypass the need for plastic containers and reduce the use of water during hair washing. The formulation, which can be tailored using additives, includes natural ingredients such as: behentrimonium chloride, a cationic surfactant to help condition the hair; shea butter and coconut oil, which provide hydration; and hydrogenated ethylhexyl olivate, a natural emollient within the base.

<sup>a</sup>Because beauty ingredient launches have, for the time being, become uncoupled from tradeshows and other live events, Global Cosmetic Industry will be rounding up new and notable launches throughout 2021. This three-part series will run in the March (Part 1), April (Part 2) and October (Part 3); subscribe to the whole series at [www.gcimagazine.com/magazine](http://www.gcimagazine.com/magazine)



Stephenson’s solid conditioning bar base is the latest addition to its Melt and Pour range, designed to bypass the need for plastic containers and reduce the use of water during hair washing.

Stephenson’s paraben-, preservative- and PEG-free Melt and Pour range has been expanded to include more than 30 products ranging from Crystal Donkey Milk to Crystal Hemp and more.

## Sustainable Rosewood Oil

Focusing on supply chain integrity, Praan Naturals has added rosewood essential oil (INCI: *Aniba rosaeodora* (rosewood) oil) to its range of more than 500 certified organic and conventional natural ingredients for personal care product development. The oil is legally imported (CITES permit acquired) and primarily comprises linalool, a monoterpene ideal for formulations intended

to support physical wellness and emotional balance.

Rosewood essential oil can support healthy skin for all skin types or, in emotionally based products, encourage a sense of calm and ease stress in consumers. The oil can also be included in blends intended for energetic and spiritual applications, per Praan. In fragrance applications, rosewood essential oil acts as a middle note that blends well with other wood essential oils, as well as those in the citrus, floral, wood, herbaceous, mint and spice families.

“Our rosewood essential oil is ethically and sustainably produced from rosewood trees that have been





*Praan Naturals' rosewood essential oil (Aniba rosaeodora (rosewood) oil) is legally imported (CITES permit acquired) and primarily comprises linalool.*

cultivated on plantations owned by local farmers in Peru,” said Anáil Mitra, CEO of Praan Naturals. “Our manufacturing partner educates, supports and works closely with Peruvian farmers and their families. Collectively, they maintain a sustainable and balanced agroforestry system that includes preparing plantation lands to ensure ideal soil conditions, planting rosewood saplings, planting other botanicals that support the system, and caring for all of the trees and plants. Their initiative also helps to improve the livelihood of Amazonian inhabitants by providing full-time employment and by helping to stimulate the economy.”

### Enhanced Sensory

The consumer experience lies at the heart of product and brand loyalty. A range of materials to enhance those experiences have recently launched.

For instance, Shin-Etsu Silicones of America (SESA) has expanded its line of hydrating PG-modified silicone emulsifiers functionalized with polyglycerin (PG) groups, including

the new KF-6100 (INCI: polyglyceryl-3 polydimethylsiloxyethyl dimethicone). According to the company, this PG-modified group of products has demonstrated, in vitro, humectant effects to retain essential moisture. The resulting formulations deliver versatile textures for serums, lotions, creams, balms and sticks. Notably, the PG-modified series is also PEG-free.

KF-6100 is a 100% active, clear liquid designed to serve as an o/w or s/w emulsifier for cosmetics and personal care. Essentially odorless and featuring high humectant effects, KF-6100 can stabilize elastomer gels and high viscosity emollients in stand-alone o/w systems.

It requires no homogenization processing and offers wide-ranging particle size modification capabilities. Notably, it is a branched polyglycerin modified silicone fluid, containing both siloxane and polyglycerin pendant groups. The branched siloxane pendant groups reportedly give it a silky and non-sticky feel.

Ultimately, the series' polyglycerin-based benefits provide essential

functionality to achieve hydration and moisturization. The PG-modified cosmetic silicone formulations work alone and collectively to deliver synergistic sensory, stability and functional benefits for a wide variety of cosmetic products.

Sustainability also counts when it comes to product texture. For example, P2 has launched CitroVisc, a line of bio-based performance cosmetics fluids with viscosities ranging from 1,000 cPs to 10,000 cPs. The line is built on the Citropol platform and, as such, CitroVisc products are derived from upgraded forestry by-products from Forest Stewardship Council certified pine trees. Commercial production of the first product in the line, CitroVisc 1000, a 1,000 cPs fluid, has started at P2's manufacturing facility in Naugatuck, Connecticut.

### Preservation Advancements

Inolex has been granted a patent that claims multifunctional preservation systems comprising caprylhydroxamic acid (CHA) and select diols for cosmetics, personal

care and pharmaceuticals. CHA is a 100% natural and readily biodegradable chelating agent derived from coconut-sourced caprylic acid. The biostatic ingredient provides “a strong hurdle” to microbial (bacteria, yeast and mold) growth across a pH range of 4-8, per Inolex. The company’s CHA-diol broad-spectrum systems portfolio includes the Spectrastat brand, including Spectrastat G2 Natural MB (INCI: caprylhydroxamic acid (and) glyceryl caprylate (and) glycerin).

In October 2020, the Cosmetic Ingredient Review (CIR) released its final report on the safety of caprylhydroxamic acid as used in cosmetics, in which the independent Expert Panel for Cosmetic Ingredient Safety concluded that CHA is safe as used in the present practices of the industry. Per Mintel data cited by Inolex, CHA has been applied in more than 5,000 product SKUs globally.

schülke’s sensiva SC 50 (INCI: ethylhexylglycerin), meanwhile, takes a multifunctional approach to preservation. The material also reportedly imparts antimicrobial-

boosting and moisturizing- and odor-reducing efficacy. sensiva SC 50 reportedly improves the skin feel of personal care formulations—in combination with glycerin, it can produce a formulation that feels less tacky and greasy with improved penetration and lower soaping.

Additionally, in vitro tests showed selective activity on odor-causing Gram-positive bacteria. Thus, sensiva SC 50 can be used as a deodorant active, as it has a minimal effect on the microbiome when compared to triclosan, which can remove the majority of microorganisms present. Studies combining sensiva SC 50 with alcohols and glycols reportedly display its synergistic, preservative-boosting and antimicrobial efficacy in finished formulations.

### Gentle, Sustainable Foaming

With sensitive skin and sustainability front-of-mind for consumers, ingredient firms are stepping forward with market-ready technology. For instance, Colonial Chemical’s ColaTeric CAHS (INCI: sodium cocoamphohydroxypropylsulfonate)

is a mild, biodegradable amphoteric surfactant suitable for foaming cleansers.

The technology lowers overall irritation when used in formulations with commonly used primary surfactants. It can be used as a replacement for amphoacetate chemistry, has biorenewable content, improved compatibility with hard water and higher purity. According to Colonial Chemical, ColaTeric CAHS offers identical foam performance when compared to a standard cocoamphoacetate. In vitro eye irritation testing demonstrates that the product would be considered minimally irritating at typical formulation levels.

The ingredient offers high viscosity-building capability compared to traditional amphoacetates and is useful in body washes to provide mildness and foam stabilization, in shampoos for improved foam and viscosity boosting, and in facial cleansers for a soft skin feel. ColaTeric CAHS can also be used in wet wipe formulations.

### Taking Color to the Next Level

Sandream Impact has developed SilikMira—comprising several collections of silica-based pigments that deliver color shifts that seemingly flow into one another. The SilikMira category includes SilikMira Variable, SilikMira Sleek, SilikMira Ice and SilikMira Max. These collections are chromium-free, have a clean heavy metal content and are globally approved for cosmetic use.

The use of vacuum deposition allows for thin layers of metal oxides to be vaporized and deposited onto a silica substrate. The result is a smooth finish created by stacking multiple thin layers. Variations in the structure such as silica thickness, metal oxide thickness and combination of the two, which can lead to a range of pigments with a variety of color travel behaviors.

The SilikMira Variable collection consists of six shades comprising saturated color travel pigments



*Shin-Etsu Silicones of America’s KF-6100 can deliver versatile textures for serums, lotions, creams, balms and sticks.*

that contain silica, synthetic fluorophlogopite, titanium dioxide, iron oxides and ferric ferrocyanide. The specific pigments in this line are SilikMira Variable GYB, SilikMira Variable ROG, SilikMira Variable VPG, SilikMira Variable TBV, SilikMira Variable VBR (INCI: silica (and) titanium dioxide (and) iron oxides (and) synthetic fluorophlogopite (and) ferric ferrocyanide) and SilikMira Variable PGO (INCI: silica (and) titanium dioxide (and) iron oxides (and) synthetic fluorophlogopite).

The fine particle size of 10-60  $\mu\text{m}$  delivers high coverage and a smooth application. It is recommended the pigments to be incorporated into liquid and cr me systems for eye, lip and other personal care products to convey the most color-optimal effects.

The SilikMira Sleek collection of interference color travel effect pigment comprises five pigments, SilikMira Sleek YGB, SilikMira Sleek ROG, SilikMira Sleek VRO, SilikMira Sleek BVR and SilikMira Sleek GTV (INCI: Silica (and) Titanium Dioxide (and) Calcium Sodium Borosilicate).

A silky smooth and homogenous application is delivered with three color shifts. The fine particle size of 10-60  $\mu\text{m}$  supplies high coverage and a chroma effect—ideal for a wide variety of makeup and personal care applications such as eye, lip, nail and face care.

SilikMira Ice's color effect is delivered via its 200-5000  $\mu\text{m}$  particle size, creating opportunities for a dramatic visual appearance and application in eye, lip, face, nail and other personal care applications. The large flakes in this collection are crushable when applied with pressure to the skin for more intense color effects. The collection comprises SilikMira Ice YGB, SilikMira Ice ROG, SilikMira Ice VRO, SilikMira Ice BVR and SilikMira Ice GTV (INCI: silica (and) titanium dioxide (and) calcium sodium borosilicate (and) tin oxide).



*Sandream Impact's SilikMira Max imparts intense color travel effect pigment flakes for makeup and personal care formulations.*

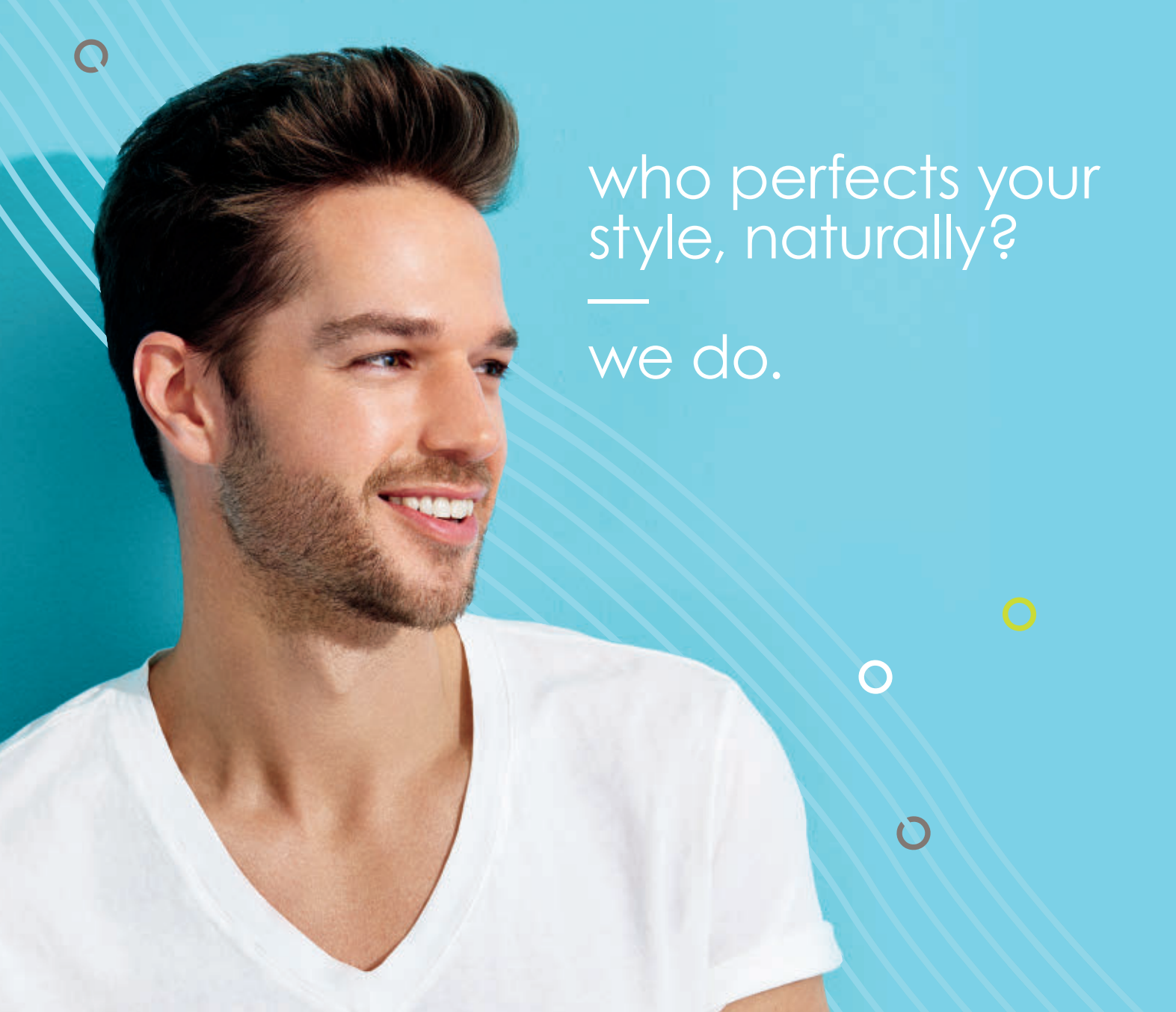


*SilikMira Ice's color effect is delivered via its 200-5000  $\mu\text{m}$  particle size, creating opportunities for a dramatic visual appearance and application in eye, lip, face, nail and other personal care applications.*

SilikMira Max is a collection of color travel effect pigment flakes. Similar to the Ice collection, the large flakes are crushable with pressure upon the skin to create a dramatic visual appearance and application. The collection's color effect is delivered via its 100-3000  $\mu\text{m}$  particle size and is available in five shades: SilikMira Max GYB, SilikMira Max ROG, SilikMira Max PGO, SilikMira Max VPG and

SilikMira Max VBR (INCI: silica (and) titanium dioxide (and) iron oxides (and) synthetic fluorophlogopite (and) tin (IV) oxide).

These pearlescent pigments are made for a wide variety of eye, lip, face, nail and other personal care applications. SilikMira Max may be used at very minimal percentages depending on visual effect wanted or higher loads to show increased payoff on skin. ■



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Consumers continue to demand natural ingredients in their beauty products, hair styling formulators seek ingredients derived from nature.

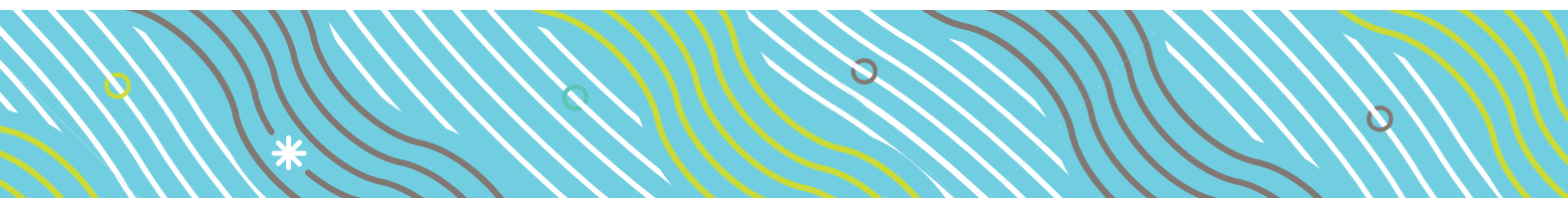
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# SKIN/SUN/ANTI-AGING



cbdMD, Inc. is entering the global beauty and skin care market with its cbdMD Botanicals, featuring 15 luxury products, including facial oil, serum, toner, moisturizers, a facial mask treatment, exfoliant and body care. The products will be available exclusively online at [www.cbmd.com/cbmd-botanicals](http://www.cbmd.com/cbmd-botanicals).



Hyalurgie has debuted its Intensive Serum collection, including Serum N°1, which is formulated with two anti-wrinkle peptides and is purportedly effective on both female and male skin. The brand has also announced the launch of its Serum N°2, which will contain a firming active, as well as Serum N°3 with a blend of three hyaluronic acids of different molecular weights.



Grove Collaborative's new skin care brand, Superbloom, is said to combat everyday aggressors such as indoor and outdoor pollution, blue light, UV light and dry conditions. The brand is debuting with two regimens inclusive of a cleanser, moisturizer and mist, in addition to two day and night serums and a peptide eye cream.



Cover FX has launched its first skin care product, the Custom Blending Moisturizer, which is said to blend seamlessly with foundation and uses five types of hyaluronic acid. The Custom Blending Moisturizer is a pre- and probiotic-enriched moisturizer that is said to create a smoother, brighter complexion by "strengthening and balancing the microbiome during the gloomy and dry winter months."



SBTRCT is a skin care brand that embraces "guilty-free skin care" by using ingredients such as squalane, glycerine, shea butter and coconut oil, and "reducing them down to their most potent form." The brand has debuted with two products: Gentle Foaming Cleanser and Moisturizing Facial Balm.

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Ace of Air, a new skin care and supplements brand, is designed to be entirely circular and fully zero-waste. Its “buy the product and borrow the package” model takes responsibility for the full life of its packaging. Customers select the products they want to receive in their Boomerang Box. Once received, they swap the new products with the used empty ones and send back the Boomerang Box from any UPS store.



Herb + Flora has introduced a range of products that supports the autophagy (the cleaning out of damaged cells) of the skin and body. In this way, the topicals and ingestibles reportedly mimic the anti-aging effects of exercise on skin. Herb + Flora’s proprietary blend, the Exercise Mimic Youth Complex, is a combination of actives that reproduces the anti-aging effects of exercise and “unlocks the life energy of skin.”



Biohyalux, a specialist in hyaluronic acid (HA), has launched its new line of skin care that caters to a range of skin types and targets specific skin issues using its Hexagonal Hyaluronic Acid Formulation (HHAF). HHAF, which comprises four molecular weights of HA, reportedly replenishes the body’s lost reserves. Each molecular weight is formulated to reach different depths of the skin to fulfill a range of regenerative and hydrating functions that improve skin from the inside out. The line includes six serums and one mask.



Formula 10.0.6 has launched an acne-fighting line, Skin So Clear Collection, and expanded its Well-Aging Vitamin Collection to offer three new vitamin E-boosted products for mature skin. Launching exclusively at Ulta, this complete set of acne-focused products is filled with salicylic acid to help relieve troublesome skin and prevent future breakouts. The vitamin range expansion features three new vitamin E-boosted products that feel deeply nourishing, calming and encourage well-aging.



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## SKIN/SUN/ANTI-AGING



Dermaclara, a skin care brand for stretch marks, scars and wrinkles, has debuted its updated Enhanced Silicone Fusion stretch mark patches and kit. The kit is used to stimulate collagen regulation and reduce stretch marks during and post pregnancy. The kit includes two Enhanced Silicone Fusion patches that have undergone improvements to size, viscosity, reusability and breathability, per the brand. It also includes its proprietary Patch Prep Formula.



Found Active is partnering with actress and supermodel Kate Upton for a collection of skin care products and ingestible supplements. Products in the collection include face serums and facial pads. The ingestibles range is said to brighten, relax the skin and provide immune support.

The Inkey List's Succinic Acid Acne Treatment, which is a fast-acting targeting treatment to help clear blemishes, is now available at Sephora. The product features 2% succinic acid to reduce inflammation, reduce oil levels and clear pores while preventing them from clogging again after use. There is also 1% salicylic acid and 2% sulfur in the treatment that helps bust blemishes and blackheads. Hyaluronic acid also helps hydrate the skin.



# HAIR



Aura, created by eSalon, has launched a personalized line of shampoos, conditioners and masques and offers the option to add a semi-permanent pigment designed to wash out over time. Customers can also select from five aromas, adjust the scent strength or opt to go fragrance-free.



To achieve a natural solution to thinning hair, More Hair Naturally created its namesake 9 product, a treatment that uses a combination of stem cells, probiotics, peptide complexes and amino acids to prevent hair thinning. This product is a part of the company's More Naturally Program. Designed for both men and women, More Hair Naturally 9 utilizes three different types of stem cells from mountain ginseng root, bamboo sprouts and stem cells from adult human fat cells; three different natural peptide complexes; and a solution of probiotic plant extracts.



Priyanka Chopra Jonas, actress and author, has launched her own hair care brand, Anomaly, at Target. Anomaly is a sustainable beauty brand and was named as a metaphor for Chopra Jonas' self-acceptance.



Mast Hair has released its line of men's cruelty-free grooming essentials made travel-friendly. The men's hair care products come in slim, biodegradable packaging made to be stored easily in pockets, luggage or gym bags. Products include: Peppermint Texturizing Shampoo, Black Pepper Styling Paste and Black Pepper Beard Oil.



The Mane Choice has launched its Manetabolism Collection, a specially formulated blend of healthy ingredients to aid in hair rejuvenation. According to the brand, the collection helps improve integrity of the scalp and hair, restores and enhances the appearance of damaged hair, and leaves hair feeling stronger and more manageable.

Everist Inc., a new clean, zero-waste beauty company, has debuted with the launch of its waterless hair care products. The company's first launch includes its waterless shampoo and conditioner formulated as a cream-paste that contains coconut-derived cleansers, aloe vera, peppermint, amla and rosemary oils among other clean ingredients. Everist is slated to expand into body care and skin care later in 2021.



# MAKEUP



Grace Chow, an influencer with more than two million Instagram followers, has launched her own beauty line, Code Mint Beauty, available on Tmall. The collection launched a nine-pan eyeshadow palette, as well as six lipsticks and a blush and highlight.



MOB is a beauty brand that features refillable packaging made from post-consumer recycled materials. The brand's earth-first packaging system provides customers with compacts, palettes and lip capsules that can be customized. MOB's packaging is made from PET resin with at least 50% post-consumer recycled content. The brand says it is on a mission to hit 100% PCR for all of its packaging.

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Kanebo Cosmetics has launched five base makeup products, which are said to enhance the natural skin vitality. SKUs include primers, foundation, a compact case and face sponge.



Huda Beauty is relaunching its #FauxFilter matte liquid foundation after listening to fan feedback, giving customers long-wearing coverage with a lasting luminous, matte effect that is fragrance-free. The updated formula is said to blend easier and offers flexible, full coverage that adjusts to the skin's natural movements. The formula is also non-drying and, once it sets, it immediately blurs skin tone and texture to give a subtle radiance that imitates a natural glow. It is available in 30 shades.

Halsey (Ashley Frangipane), a multi-platinum singer and songwriter, has launched her first makeup line called, About-Face. About-Face features a range of highlighters, lip colors, eye paint, set and prime spray, eyeshadow crayons and beauty tools.



L'Oréal is beta launching YSL Rouge Sur Mesure Powered by Perso, a personal lip color device that allows users to "print" their own custom shades. An early version of the technology debuted at CES 2020. Rouge Sur Mesure comes in four shade groups—reds, nudes, oranges and pinks—that offer thousands of lip shades per set. The system features a trio of cartridges that can be loaded into the Perso device.



The Ordinary has launched a full-coverage concealer that is available in 21 shades, according to Allure. The concealer offers a high-spreadability suspension system that provides buildable coverage with a "real skin finish," according to Deciem's chat room.

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**MAKEUP**



Lawless has launched the Forget the Filler Lip Plumping Smoothing Gloss, a clean lip-plumping treatment and ultra-shiny gloss with immediate and long-term plumping, softening and hydrating benefits. According to the brand, the gloss increases lip volume by 40% and decreases lip wrinkles by 29%. It also increases collagen by 351%, increases lip condition by 100%, lip softness and comfort by 70%, and lip hydration by 60%.



Missguided, known for its fashion line, has debuted Missguided Beauty. The line of beauty products range from lip gloss to blush to foundation to eyeliner and mascara. Its concealers are said to feature inclusive shades to suit all skin colors. “All Missguided Beauty products are created to stay all day, from lipsticks to brow wands,” according to the brand’s site.



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# BATH/BODY/GROOMING/FRAGRANCE



Beautycounter's first clean, refillable deodorant, The Clean Deo, features monomaterial packaging that comprises polypropylene. The format is said to cut water, fossil fuel and greenhouse gas emissions by an estimated 47% and helps minimize waste in landfills.



Necessaire's four new body care products include a body wash, serum, lotion and hand cream.



Kanebo Cosmetics will be launching its Scrubbing Mud Wash and Instant Off Oil on March 5, 2021. Both are formulated to free the skin from the daily buildup of impurities and residue makeup, leaving a clear and polished complexion.



RéVive Skincare has debuted its Perfectif Night Even Skin Tone Cream Retinol Dark Spot Corrector. It features a microencapsulated retinol that helps to target the visible signs of aging, powered by a skin-brightening peptide and vitamin C to help reduce the appearance of hyperpigmentation.

Jack Henry, a company that focuses on “clean” men’s care, put together several kits that target different personal care needs. In particular, the company created The Essentials Kit for men who are looking for basic body care. The Essentials Kit includes three products: Cleanse+, Deodorant and Clay Pomade. The company utilizes amber glass bottles and jars to minimize plastic waste and fully protect the product inside.





Cleanli, a natural cleansing brand, has launched its first product, Rosemary Yuzu Moisturizing Hand Sanitizer. Cleanli's hand sanitizer uses natural, USDA-organic ethyl alcohol for its 63% alcohol content. It is denatured using natural rosemary essential oil.



Native and Jungalow are partnering for a limited edition deodorant and body wash collection that features four scents. Native's deodorant is aluminum-free, vegan and cruelty-free. The body wash is pH-balanced and made from cleansers derived from coconut oil, which leaves your skin feeling hydrated and clean.



Nitric Oxide Rejuvenation from TruBeauty is a dietary supplement that reportedly utilizes the functions of the nitric oxide pathway to help the body with nutritional absorption. The supplement is said to support the production of nitric oxide as a bio-identical therapy, to improve the body's ability to absorb essential nutrients for targeted purposes.



CocoBaba, founded by Emma Heming Willis, has launched its first line of skin care products, designed for moms and moms-to-be, with products that focus on hydrating the skin and reducing the appearance of stretch marks. The products are curated with pure certified organic coconut oil.



Weibo Hi-Tech, a China-based OEM, launched seven freeze-dried serums, seven freeze-dried masks and a freeze-dried eye mask. According to the company, freeze drying and flash release technology have several advantages for beauty, including the maximization of the activity of key ingredients without the need for added preservatives.





O-Shot Women has expanded its sexual wellness line with its hemp extract-containing lubricant, O-Shot Liquid Glide Water-based Personal Lubricant. This natural, plant-based lubricant was reportedly developed to mimic the body's natural lubrication to boost moisture, glide and sensation.



Franz Skincare has launched its Jet Plus Brightening Microcurrent Facial Dual Mask, which combines micro-current technology with ingredients specifically meant to brighten skin and combat dullness and dark spots. The mask uses Franz Skincare's Tissue X to deliver nourishing ingredients deep into layers of the skin for a more effective delivery than a typical topical application, per the brand. Tissue X is non-invasive and eco-friendly as it uses water to create tiny waves across the skin.

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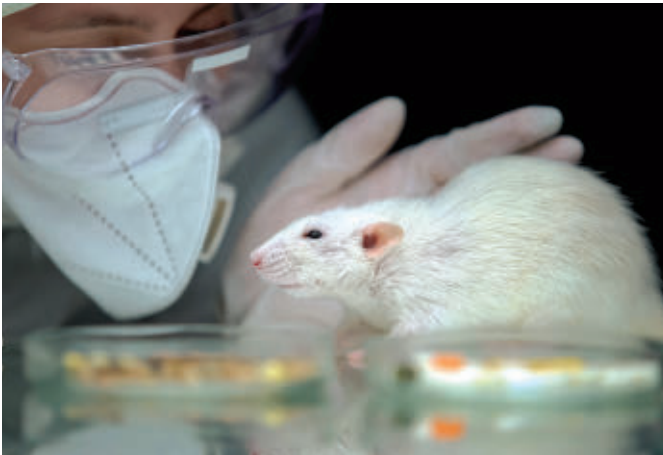
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# REGULATORY & TESTING



According to France's beauty federation, the Fédération des Entreprises de la Beauté (FEBEA), France has become the first country in the European Union (EU) to export "ordinary" cosmetics to China without animal testing. Ordinary cosmetics include shampoo, blush, mascara and fragrances.

In order to bypass this criterion, companies worldwide must present a certificate to approved authorities that states the company is conforming to Good Manufacturing Practices, in addition to product safety assessments. Companies that fulfill the criteria for importing ordinary cosmetics no longer require animal testing for eye and skin irritation in Chinese laboratories.



NSF International has been accredited by the ANSI National Accreditation Board (ANAB) to certify manufacturers to the NSF/ANSI 455 GMP standards. This accreditation expands NSF's dietary supplement Good Manufacturing Practice (GMP) certification program to now include cosmetic, personal care and over-the-counter (OTC) product manufacturers. According to the organization, it is the first independent certifier to begin auditing and certifying products to the updated GMP standards.



The Thai government has approved low-THC hemp ingredients for domestic cosmetics as of Jan. 12, 2021. Manufacturers can now produce cosmetics containing hemp seed oil or extract provided they also do not have a THC level exceeding 0.2% by weight.



On Jan. 6, 2021, China's NMPA released draft Instructions for Toothpaste Notification Dossiers. According to the CSAR, toothpaste will be regulated in accordance with the regulations for general cosmetics, requiring notification, testing, safety assessment, efficacy evaluation and new toothpaste ingredient application, among others. One mandate for notification is that the notifier annually report on the manufacture, import and adverse reaction monitoring of the notified toothpaste to the competent authority.

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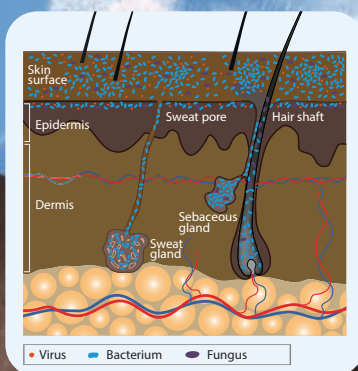
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