

Ingredient-Led Beauty

September 2023

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INGREDIENT-LED BEAUTY

Scope

Key findings

STATE OF PLAY

Ingredient-led beauty is propelled by consumers' quest to control their health outcomes

Underlying consumer and megatrend drivers underpin the rise of ingredient-led beauty

STATE OF PLAY

Natural claims in beauty rise along with consumer demand for ingredient specificity

Ingredient-led beauty will continue to influence beauty and personal care in 2023 and beyond

End-product value opportunity is greatest in skin care and hair care

THE INGREDIENT-LED BEAUTY CONSUMER

Female consumers more ingredient-conscious than males, but males' awareness growing

Ingredient consciousness is growing among all generations, but especially Generation X

Ingredient features are associated with premium beauty and greater willingness to pay more

Extensive beauty users cite higher skin and hair concerns; knowledge gaps still exist

The link between ingredients and digital platforms occurs early in the consumer journey

Consumers leverage beauty apps and influencers to gain knowledge about ingredients

TOP TRENDS SHAPING INGREDIENT-LED BEAUTY

How ingredient-led beauty is manifesting in top beauty and personal care trends

Private label is emerging as a clear winner to balance efficacy and affordability

The expansion and blurring of wellness spaces are anchored by well-known ingredients

Concerns surrounding women's wellness create opportunities for existing ingredients

Neuroactive ingredients reinforce the "From Function to Emotion" beauty trend

INTERNATIONAL BEAUTY CONCEPTS

Exotic and innovative ingredients are influential properties in international beauty concepts

K-beauty: Plant extract and scientific formulas to maximise effects

C-beauty brands focus on developing patented ingredients to impress consumers

Ayurvedic beauty has gained popularity as consumers seek holistic wellness-orientated solutions

A-beauty has evolved into cutting-edge eco-friendly beauty concepts on ingredients

Halal beauty and J-beauty

INGREDIENT-LED INNOVATION CONCEPTS

Aqua/water top volume sizes, but zinc oxide and hyaluronic acid record high growth in 2022

Future growth expected in peptides and collagen, but also probiotics in skin care, bath and shower

Skinification trend extends ingredients' impact from facial care to other categories

Active ingredients are prominent in skin care, but are climbing to the top in hair care

Hair skinification continues through launches of hyaluronic acid and salicylic acid

Skinification boosts demand for SPF moisturisers, hybrid facial make-up, and mineral filters

Mass brands show hero ingredients in fun, colourful collections that highlight natural sources

Premium brands' emphasis on clean, sustainable ingredients remains central to higher pricing

Super-premium brands invest decades of ingredient research and have high-end packaging

FUTURE OPPORTUNITIES AND CHALLENGES

Sustainability will influence the next wave of ingredients and formulation methods

Microbiome care to grow as consumers quest for holistic wellness and ingredient transparency

AI, machine learning, quantum computing to revolutionise ingredients discoveries

Future demand shaped by appetite for aesthetic procedures, pollution, warming climate

Regulatory environment will place more pressure on ingredient transparency

KEY FINDINGS

Key findings

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