

Ingredient trends in indie beauty



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Wellbeing strengthens and extends scope

Wellbeing

Holistic healthy lifestyle

- Beauty
- Nutrition
- Fitness
- Hygiene



Since COVID-19 consumers around the globe seek to improve wellbeing with beauty

IN THE US

45%

of adults have more **highly prioritized mental wellbeing** since the start of COVID-19

IN GERMANY

32%

of women are interested in **beauty/grooming products that help relax**

IN CHINA

27%

of adults have used **beauty/grooming routine to reduce stress level**

Base: US: 2,000 internet users aged 18+, September 2020; Germany: 506 female internet users 16+, July 2020; China: 1000 internet users 18+, July 2020;

Source: Lightspeed/Mintel; KuRunData/Mintel



Wellbeing messaging pairs up with stress relief plants



Centella asiatica (cica)

VT Cosmetic Cica Sleeping Mask can be used on the go to soothe, calm and balance skin.



Withania somnifera (ashwagandha)

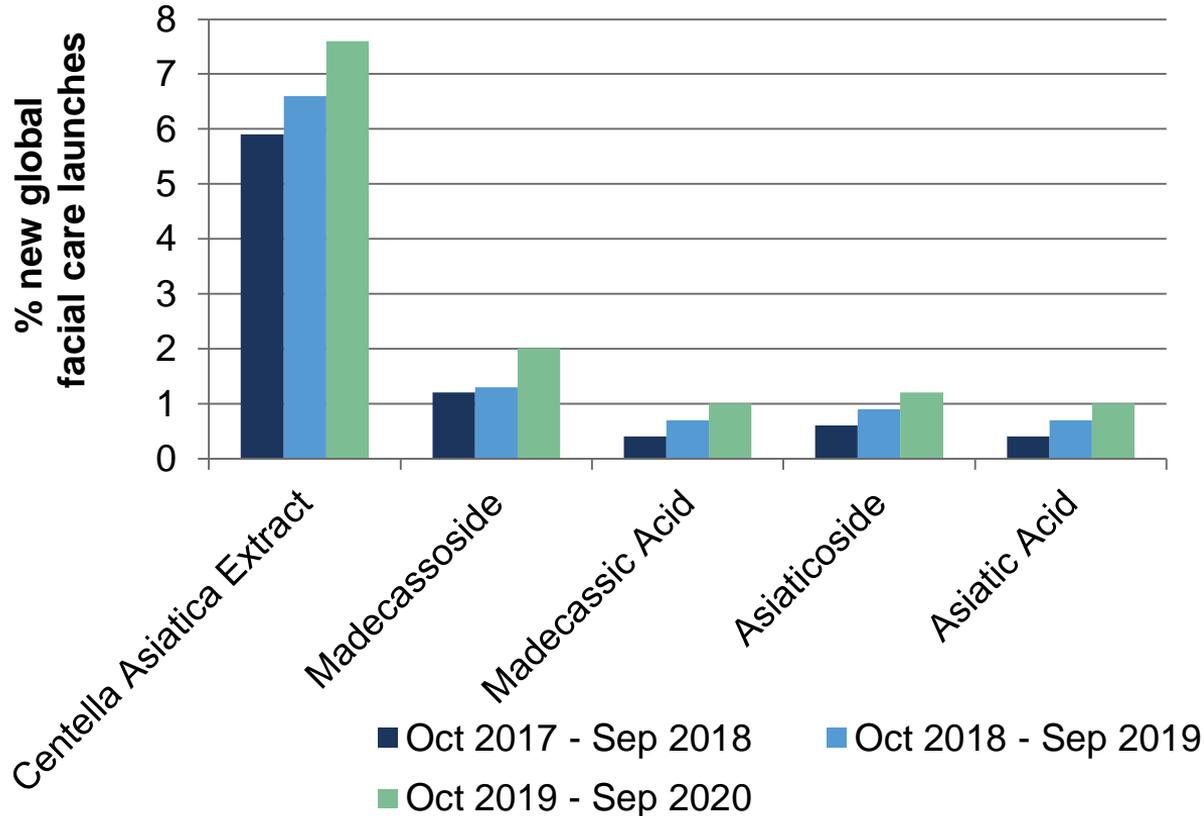
Moon Juice Cosmic Cream contains adaptogen ashwagandha. *Adaptogens* are plants described to attenuate physical, chemical and biological stressors on the body.



Curcuma longa (turmeric)

Ahava Superfood Kale & Turmeric Smoothing Body Lotion is said to nourish, hydrate and protect skin.

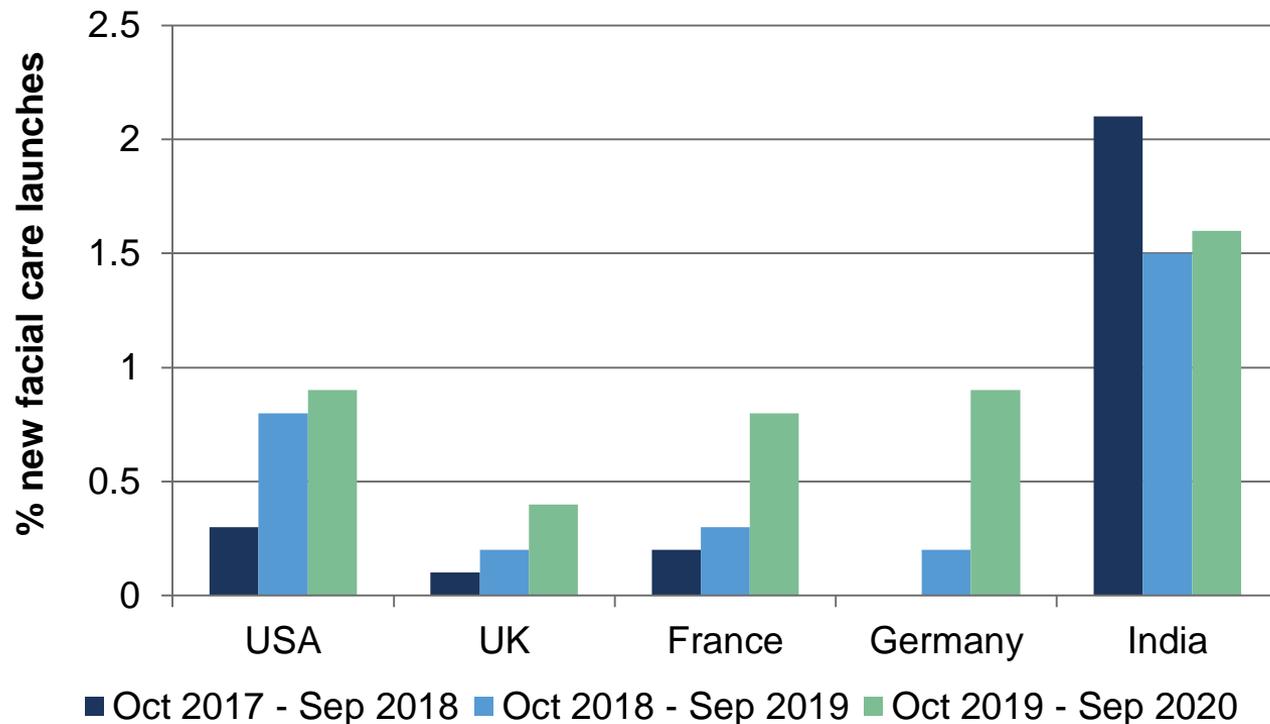
Usage of cica (*Centella asiatica*) extract and plant actives rise globally



Usage in new facial care launches in key markets

- *Cica*: fixture in South Korea (26% of launches Oct 2019-Sept 2020); marked increase in China
- *Plant actives*: growth in UK, US, South Korea

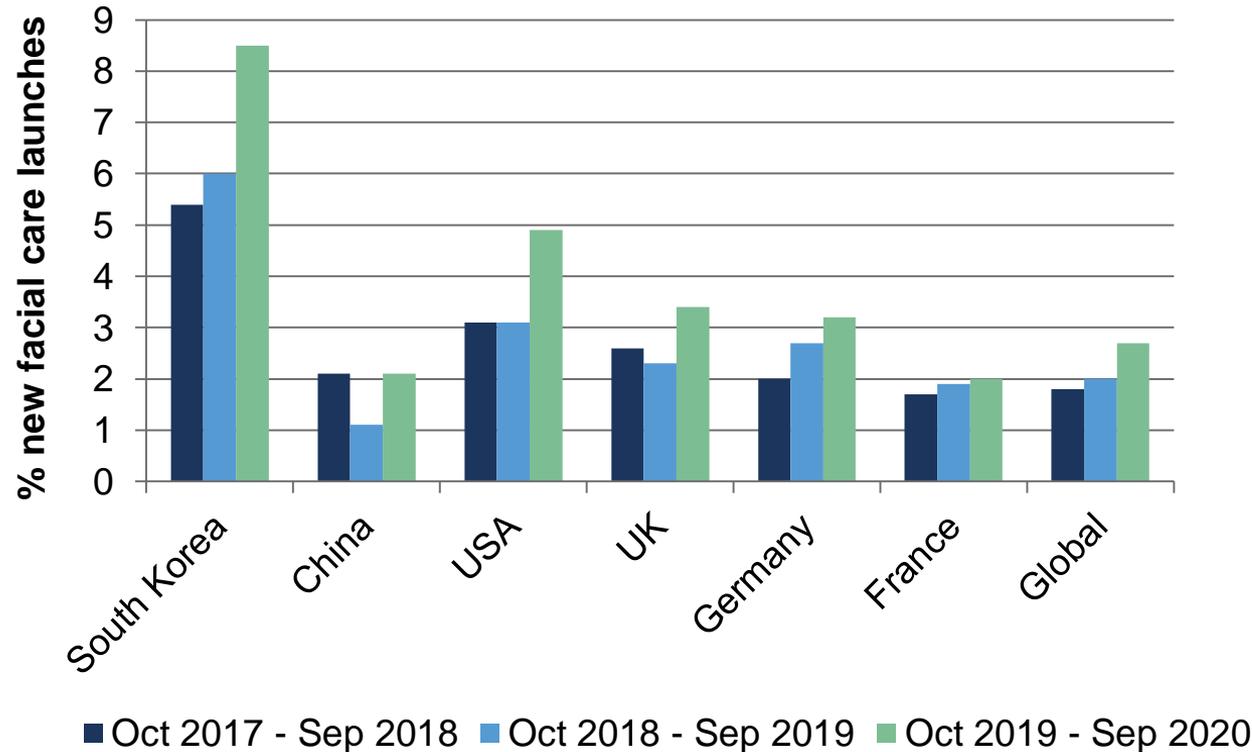
Usage of ashwagandha root extract rises in the West



Ayurveda
ashwagandha
described health
benefits:

- adaptogen (anti-stress)
- antioxidant
- anti-bacterial (anti-acne)

Usage of turmeric root extract rises in Western markets



New global body care launches:

Over last year, usage of turmeric root extract has increased 0.5% - a 167% increase from Oct 2018-Sep 2019

Cannabidiol (CBD) is a sought after natural ingredient to relax and de-stress

58%

of US adults who currently use CBD take the compound to reduce stress; 50% take it to ease anxiety

82%

of US adults have used or have an interest in using CBD topical products (ie cream or lotion applied directly to skin)

61%

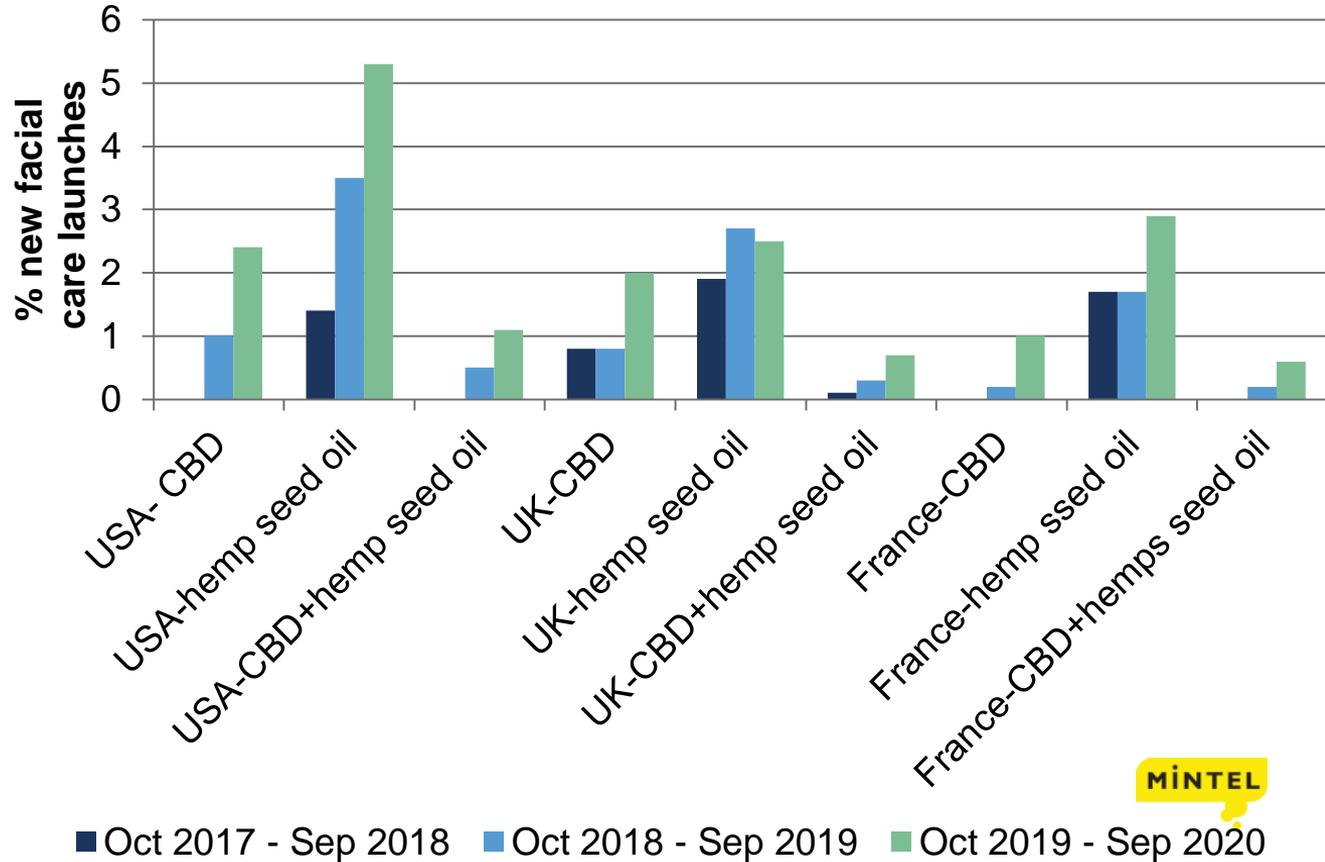
of US adults find the relaxing effects of beauty products that contain hemp or CBD appealing

Base: US: 418 internet users 18+ who currently use CBD; 457 internet users aged 22+ in states where it is legal to purchase cannabis for recreational use who have used CBD-only products; 1,149 internet users aged 18+ who have any interest in using beauty products with hemp or CBD

Source: Lightspeed/Mintel

Spotlight is on hemp ingredients in the West

Cannabis sativa (hemp) plant ingredients (CBD and hemp seed oil) offer a holistic health & wellness from within and out narrative that delivers nutritional vigor and emotional re-balance.



Watch out for cannabigerol (CBG) in beauty

Expect newly bioengineered CBG, normally found in low levels in the *Cannabis sativa* plant, to create new brand stories showcasing the multi-benefits of cannabinoids for skin and hair.



CBD + Arnica Solid Body Oil has CBD, CBG and hemp seed oil



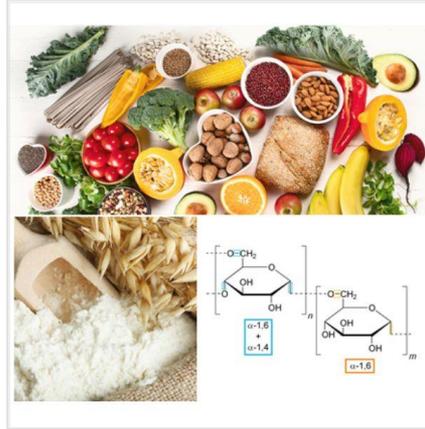
Frigg Attuning Hair Potion: 3:1 Broad Spectrum Cannabinoid Complex (CBD/CBG 400mg)

The "three Ps" keep skin in balance



Probiotic: a living microbe

Living microorganisms commonly used to help relieve digestive distress. Can produce lactic acid. Rarely found in skincare products.



Prebiotics: healthy food for 'good' bacteria

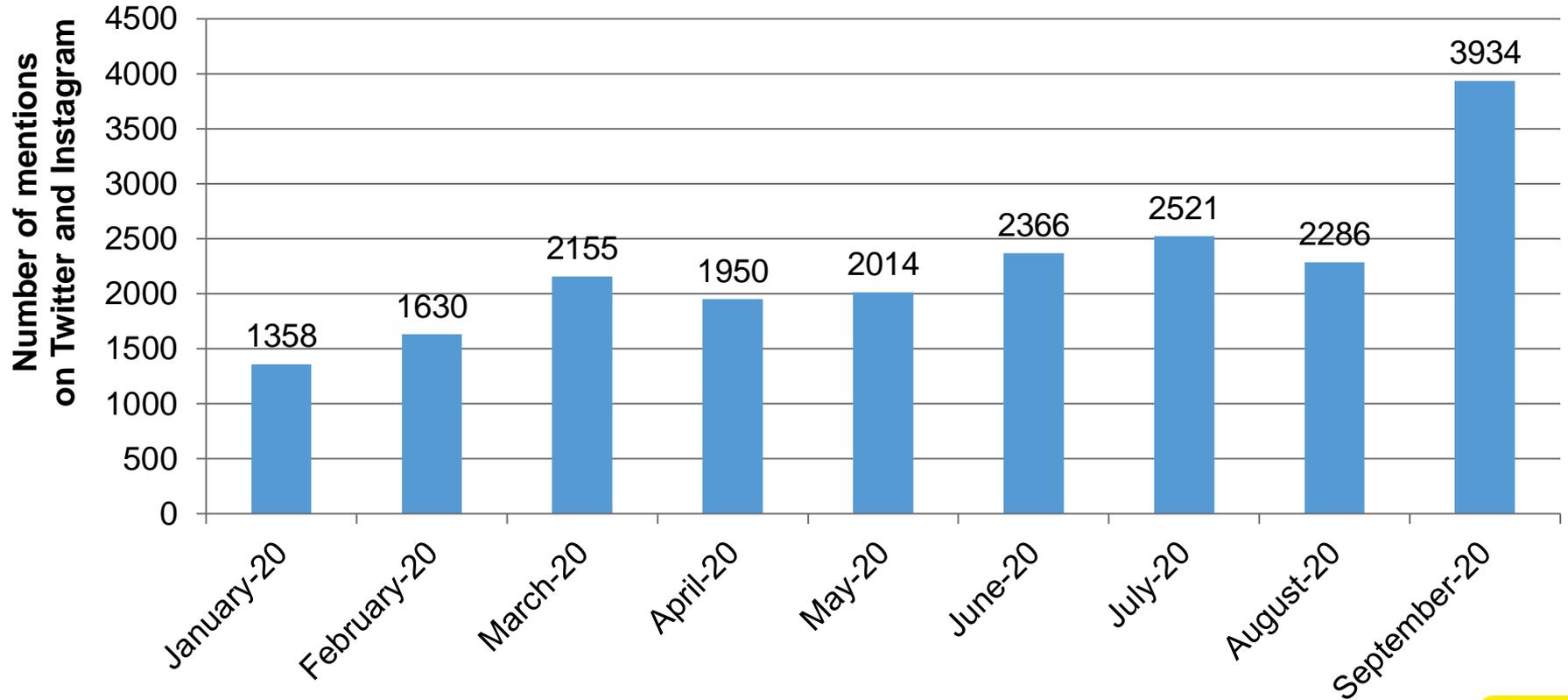
Inulin & fructooligosaccharides from foods along with alpha-glucan oligosaccharide boost the growth and health of good bacteria.



Postbiotics: probiotic fermented ingredients

Postbiotics (enzymes, peptides, organic acids, antioxidants, lactic acid) are produced by probiotics during the fermentation process. Beneficial skin activities include antimicrobial, anti-inflammatory, antioxidant.

Social media mentions of prebiotic and skin rise in US in 2020



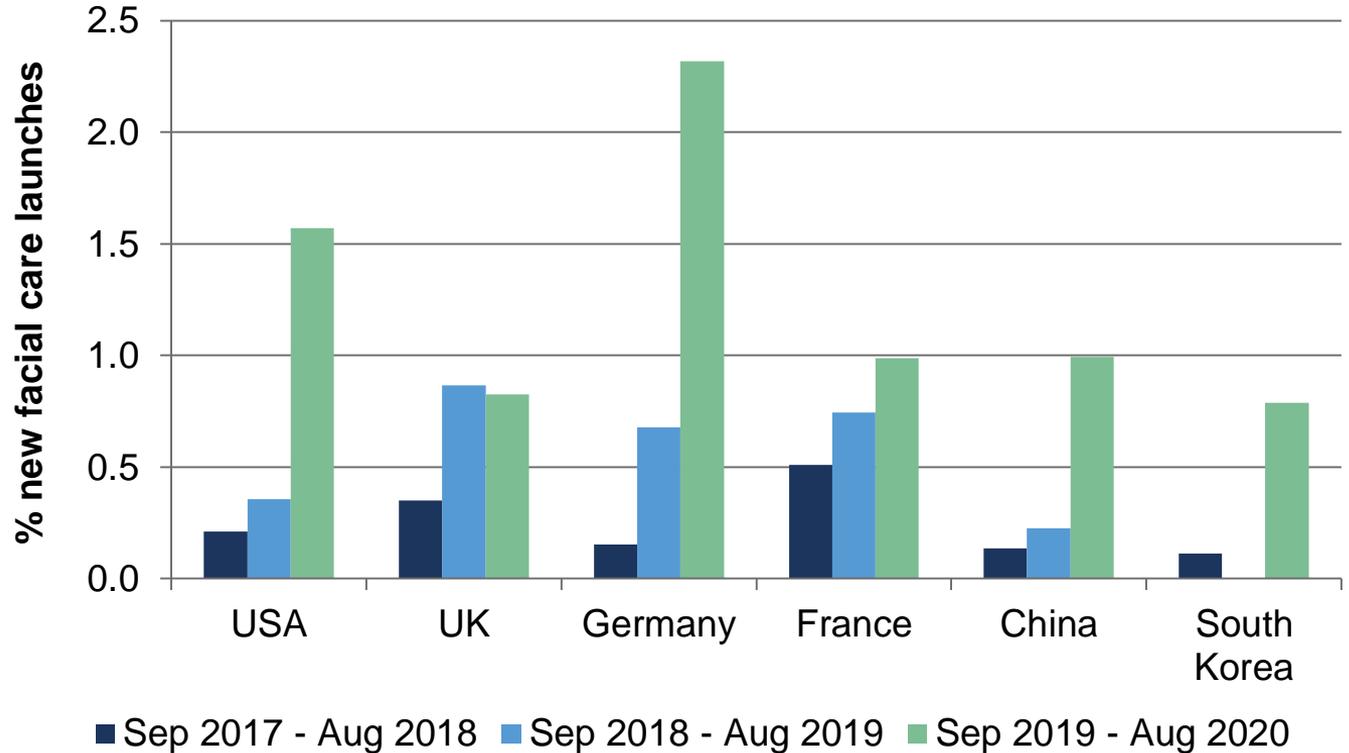
Base: US: 20.2k mentions of prebiotics and skin on Twitter and Instagram, Jan-Sept 2020

Source: Infegy/Mintel



Inulin prebiotic: facial care usage grows across globe

Inulin: a polysaccharide comprised mostly of fructose; it can be obtained from a variety of plants, dietary vegetables/fruits (eg chicory (root), asparagus, bananas).



Spotlight is on chicory root



Lift, firm and hydrate

Ceramiracle O'Cal Nature Balance Warrior Probiotic Cream:...*chicory root, a source of prebiotic fiber, to provide visible lift and firmness to skin while hydrating.*



Soothe and strengthen

Garancia Diabolique Glaçon Crystalline Jelly:...*chicory root, a precious prebiotic which soothes and strengthens the skin microbiota...*



Comfort and condition

Miya Cosmetics Beauty.Lab Illuminating Facial Tonic with 5% Glycolic Acid:...*inulin prebiotic from chicory root, to restore comfort and provide conditioning effect...*

Prebiotics maintain a healthier skin microbiome



Support function

AA Yogo Shake Migdały & Prebiotyki Anti-Wrinkle Yogurt Day and Night Cream: *it is formulated with prebiotics, to support the proper functioning of the skin microbiome. (alpha-glucan oligosaccharide)*



Regulate

Bioderma Sensibio DS+ Soothing Purifying Cream: *...prebiotic, responsible for regulating the microbiome in a lasting way. (fructooligosaccharides)*



Improve

Esse Sensitive Mask: *...feed with prebiotic nutrients to advantage microbes that improve the microbial ecology on the skin... (alpha-glucan oligosaccharide, inulin)*

Ingredients tap into a growing wellbeing narrative

Reduce stress

Cica, ashwagandha and turmeric said to nourish, soothe and calm skin.

Relax and fortify

- Hemp seed oil offers a nutritional supplement for the skin; it is rich in omega 3 and 6 essential fatty acids.
- CBD taps into general wellbeing benefits such as calming, soothing and nourishing skin.
- Welcome cannabinoid newcomer CBG: antioxidant, anti-inflammatory and moisturizer.

Maintain a healthier skin microbiome

- Prebiotic inulin from chicory root helps support and strengthen the skin microbiome.
- Oligosaccharide prebiotics: alpha-glucan oligosaccharide, fructooligosaccharides

Meet the Expert



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**The world's leading market
intelligence agency**

Our expert analysis of the highest quality data and market research will help you grow your business.



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consumers want
and why**

