

What's trending in beauty ingredients?

Ingredients to watch in Beauty



Experts in what consumers want and why



Trends

Mintel is a world leader in trend spotting and market predictions with observers and analysts covering 35 markets.



Consumers

Mintel conducts primary research with 40,000 consumers around the world every month.



Analysts

Mintel has 200 global category, consumer and functional analysts.



Products

Mintel purchases 1,500 new products, in 86 markets, every day.



Menu Insights

Mintel collects thousands of US menus every year to track trends in the menu optimization, flavors, ingredients and preparation.



Consulting

Mintel strategists provide custom problem solving and actionable advisory.

AGENDA

1

BALANCE EMOTIONS AND
WELLNESS

2


MAKE 'CLEAN' A PRIORITY

3

IDENTIFY EARLY SIGNAL ON
MINTEL'S GLOBAL NEW
PRODUCT DATABASE (GNPD):
EMERGING INGREDIENTS

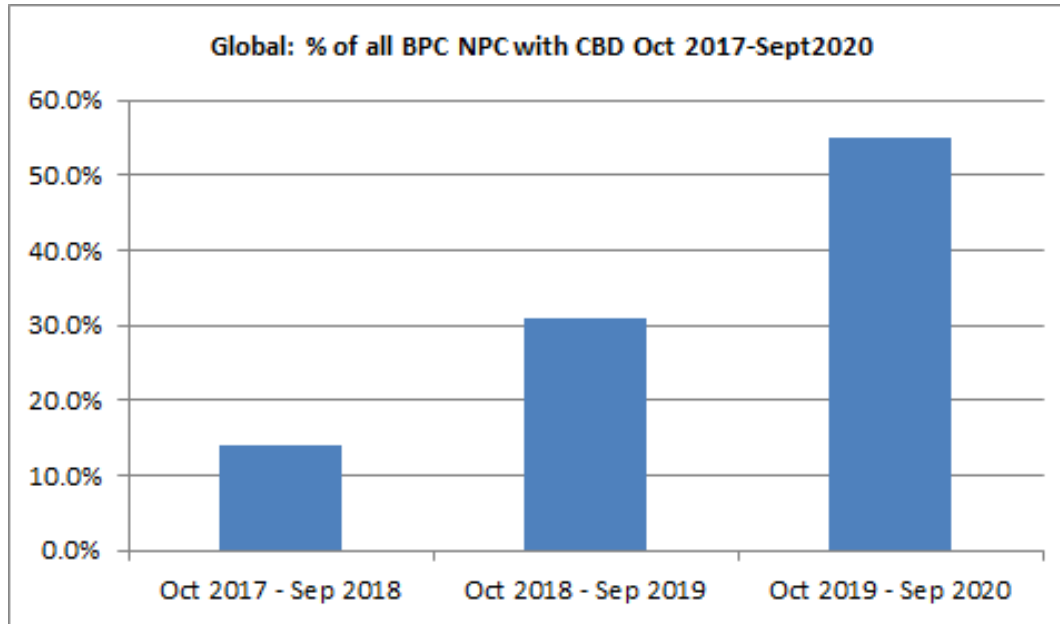
and breathe

BALANCE EMOTIONS AND WELLNESS



Riding on the Cannabidiol (CBD) wave

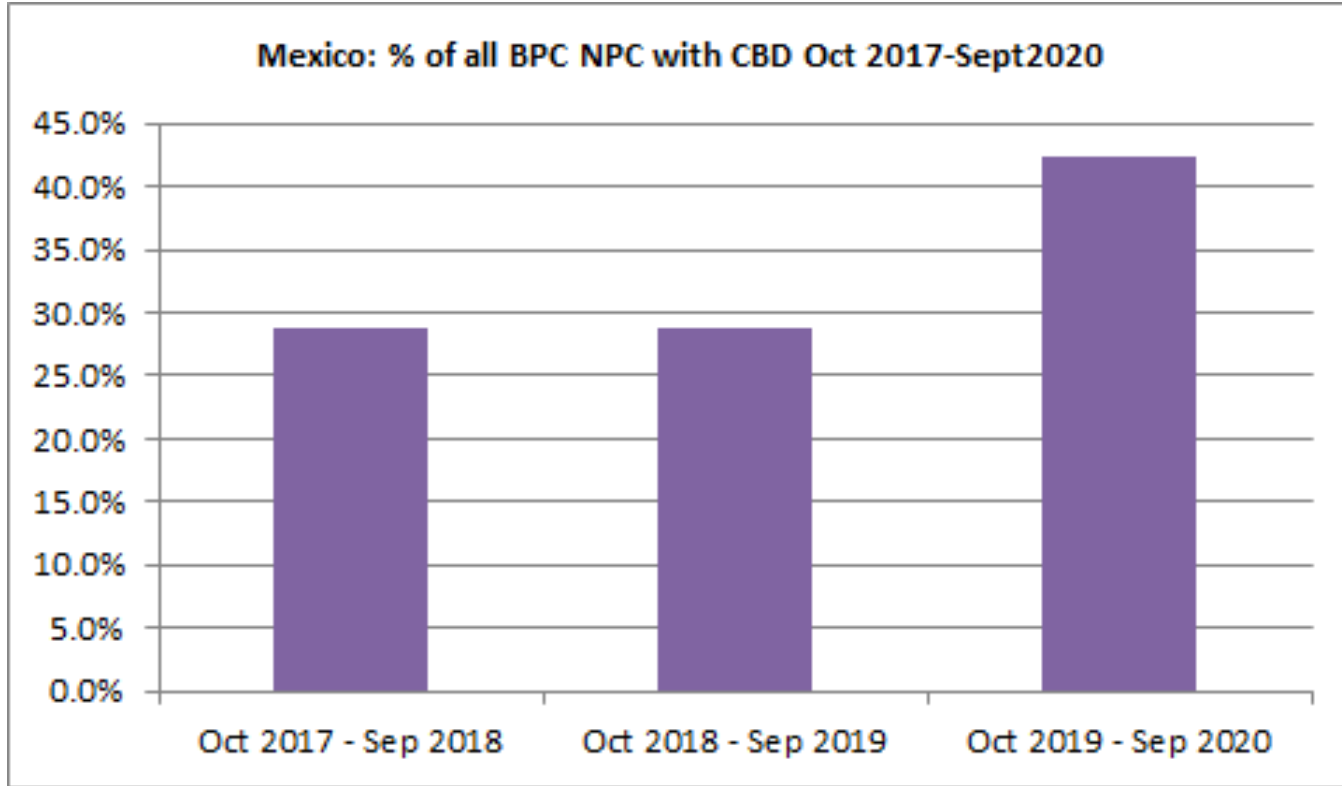
CBD is widely associated with good health



Cannabis Sativa Seed Oil/Extract

Data from Mintel's GNPD shows 33% rise in CBD containing products in the UK BPC market in 2018 compared with 2017, with 86% of CBD-containing products featuring in the skincare category in 2018.

CBD as an ingredient in BPC products is growing in Mexico



Cannabis Sativa Seed Oil/Extract

Cure-all claims position CBD well

Pharmacy-inspired head-to-toe



[FAB First Aid Beauty](#) Oat & Hemp Multi-Fix Salve is described as a **fix-it-all** balm designed to protect skin from emergencies, and provide a solution for (almost) all problems. Hemp seed oil claims to soothe distressed skin.

Healing from inside and out



[I Want You Naked The Beauty Intense Moisturizing Cream](#) features a formula with active organic hemp seed oil, described as a **turbo for cell renewal** and at the same time **protects against harmful environmental influences**.

Anti-ageing, skin-soothing CBD drops



[Rodial CBD Sleep Drops](#) are said to deliver a rested looking skin, showcasing CBD as a balancing active with powerful anti-inflammatory properties, which helps calm visible stress, and reduce the appearance of redness.

Opportunities further than skincare with CBD

1

Combine CBD with
superfood ingredients

2

Incorporate CBD into sun care

3

Target male consumers

Opportunities further than skincare with CBD



CBD-infused and mood-scent oriented [MOOD Chill](#)*: a genderless, CBD-infused body lotion that claims to lock moisture into skin while keeping the [mind and body relaxed](#). Scents affect mind and body like the zZz one showcasing soft lavender.



For the "sun-loving, tree-hugging festival fairies" [Felix & Ambrosia Sunny Daze Sun Cream](#) is infused with CBD and glitters when applied.

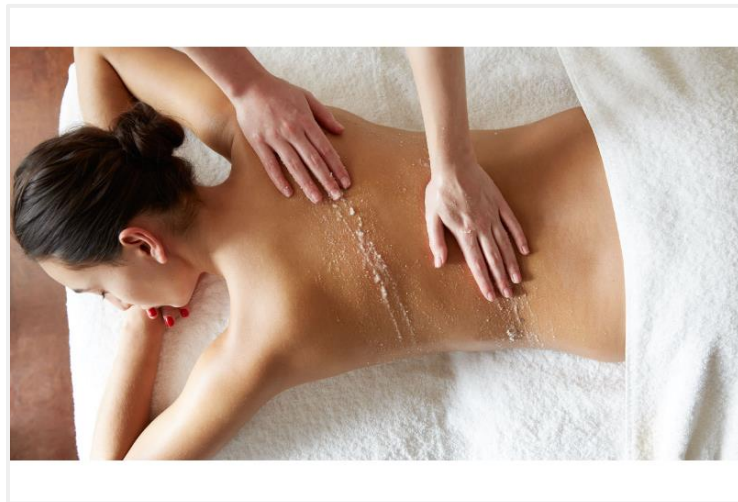


Men's care [Mr Natty Superior Beard Balm blended with CBD](#) uses the ingredient to assist absorption of vitamins.


Be bold and explore adjacent categories' needs



Daye CBD-infused tampon to relieve period pain

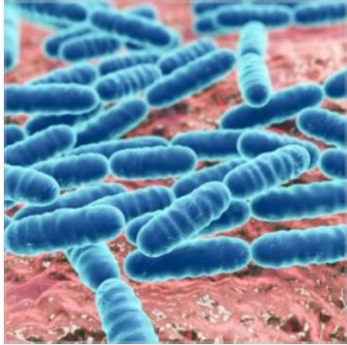


Salons target a wider audience with new treatments
([Cowshed/Threads & Co](#), UK)

A woman with dark hair tied in a bun is shown from the chest up, wearing a black sports top. She is in a yoga pose, with her head tilted back and one arm extended upwards. The background is a plain, light gray. A semi-transparent white box with black text is overlaid on the image.

Postbiotics advance the probiotic wellness narrative

Focus on the "three Ps" for balanced skin



Probiotic: a living microbe



Prebiotics: healthy food for 'good' bacteria



Postbiotics: probiotic fermented ingredients

Product examples of the "three Ps" for healthy-looking skin



Probiotics

[Esse Probiotic Serum](#) is a vegan formula prepared with 100%-natural ingredients. It contains 50 million live probiotics (*Lactobacillus* species) per drop that works with **resident skin microbes** to reduce the appearance of skin ageing.



Prebiotics

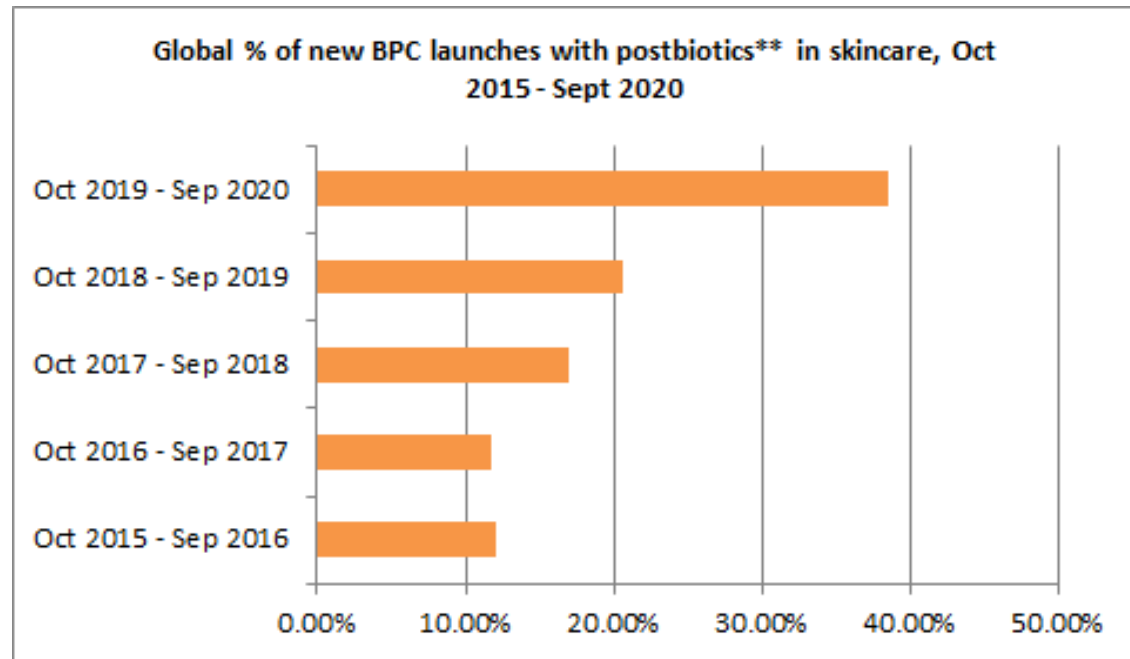
[Algenist Alive Prebiotic Balancing Moisturizer SPF 15](#) is formulated with a prebiotic from algae to help **balance the skin's natural ecosystem**.



Postbiotics

[Missha Time Revolution Night Repair Borabit Ampoule](#) is packed with a variety of **probiotic** (*Lactobacillus*, bifida and *Lactococcus*) **ferments**, including *Lactobacillus*/soybean ferment extract to enhance **the skin's overall health**.

Usage of postbiotics rises across skincare products



“Pre, pro and post-biotics aren’t just for your morning yogurt - they can work wonders when applied topically to your skin too!”
The Inkey List

Base: ** launch type matches one or more of new variety/range extension, new product, where only products with ingredients are shown; full text search matches Lactobacillus or Bifida or Lactococcus with word variants

Source: [Mintel GNPD](#)

Postbiotic and yeast ferment pairings elevate skin wellness



Ferment smorgasbord

[Mission Summa Serum](#) is packed full of *Lactobacillus* postbiotics and *Saccharomyces* food ferments, along with a number of natural extracts and seed, fruit and flower oils to help firm and smooth skin.




A healthy team

[Kerstin Florian Clarifying Probiotic Refining Serum](#) contains *Lactobacillus* ferment lysate with a *Saccharomyces*/xylinium/black tea ferment to help maintain a healthy skin balance.



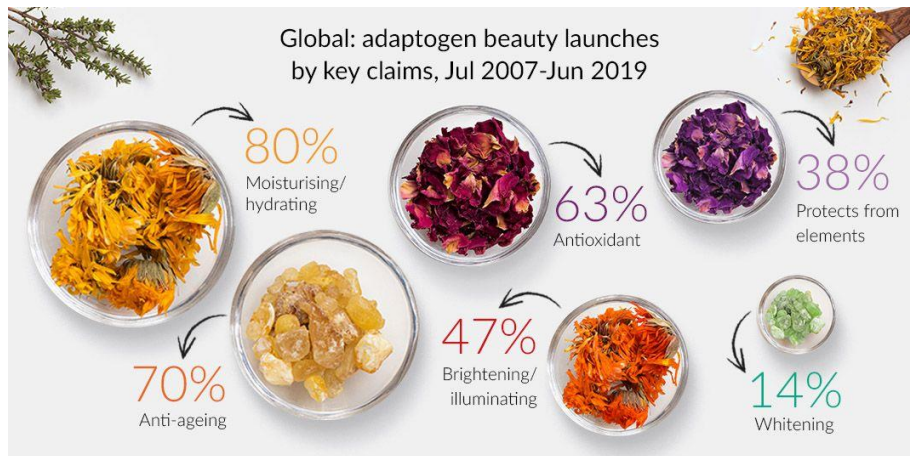
Ferment-rich wash

[HoliFrog Superior Omega Nutritive Gel Wash](#) contains *Lactobacillus* and *Saccharomyces* ferments prepared with a set of natural oils that cleanse while reformatifying skin.

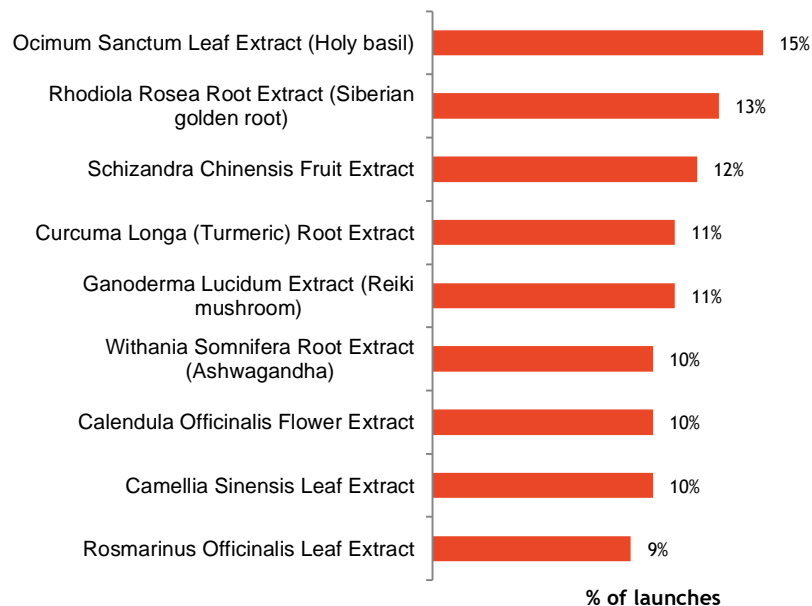
A cluster of small, orange-brown mushrooms with white gills, growing on a dark, textured surface. The mushrooms are arranged in a dense, rounded group. The background is dark and out of focus, showing some greenish-brown textures.

The wonderful world of adaptogens

Adaptogen beauty launches focus on anti-ageing benefits



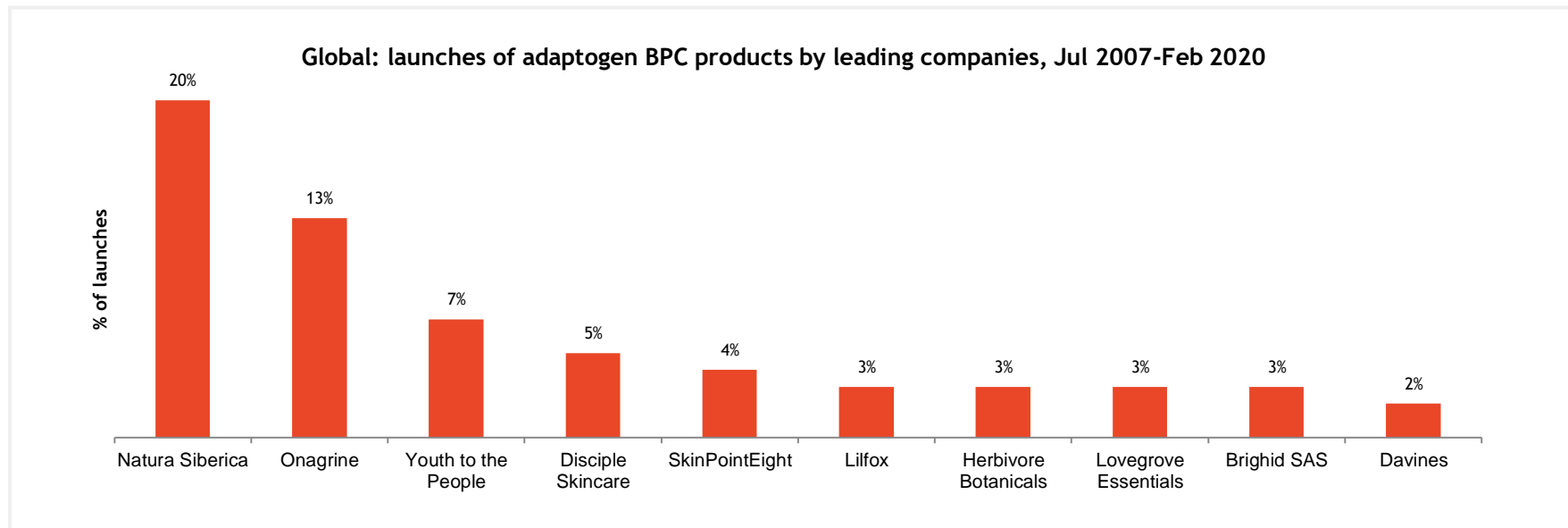
Global: launches of adaptogenic BPC products by leading botanical extracts, Jul 2007-Feb 2020



Free text search for adaptogen (and word variants) in the product description

Source: Mintel GNPD ([Claims](#), [Ingredients](#))

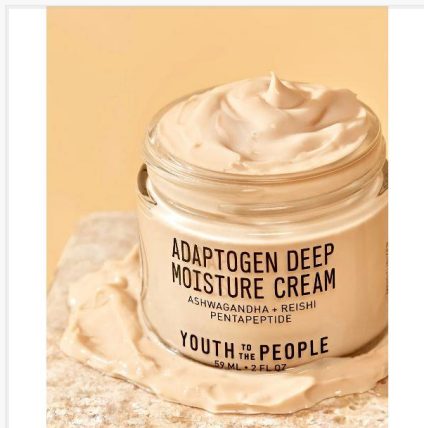
Most companies launching adaptogen beauty products are primarily active in the natural beauty space



Examples from leading companies including adaptogens




Supports Siberia's economy
[Natura Siberica](#) uses Siberian Sakhalin limonnik, for rejuvenating effects; Siberian ginseng, to tone and rejuvenate skin; and *Schisandra chinensis*, one of the most famous adaptogens on the planet that survives in the harsh Siberian winter.



Balance, restore and protect the body
[Disciple](#) uses adaptogens including ashwagandha to improve the body's ability to adapt to stress and rebalance hormones. The brand talks about "intelligent hydration".



Combines the best of science and nature
[Youth To The People](#) uses superfoods and adaptogens including ashwagandha, [rhodiola](#), reishi and holy basil in its age-prevention skincare line, which it targets to today's health-conscious and informed consumer.



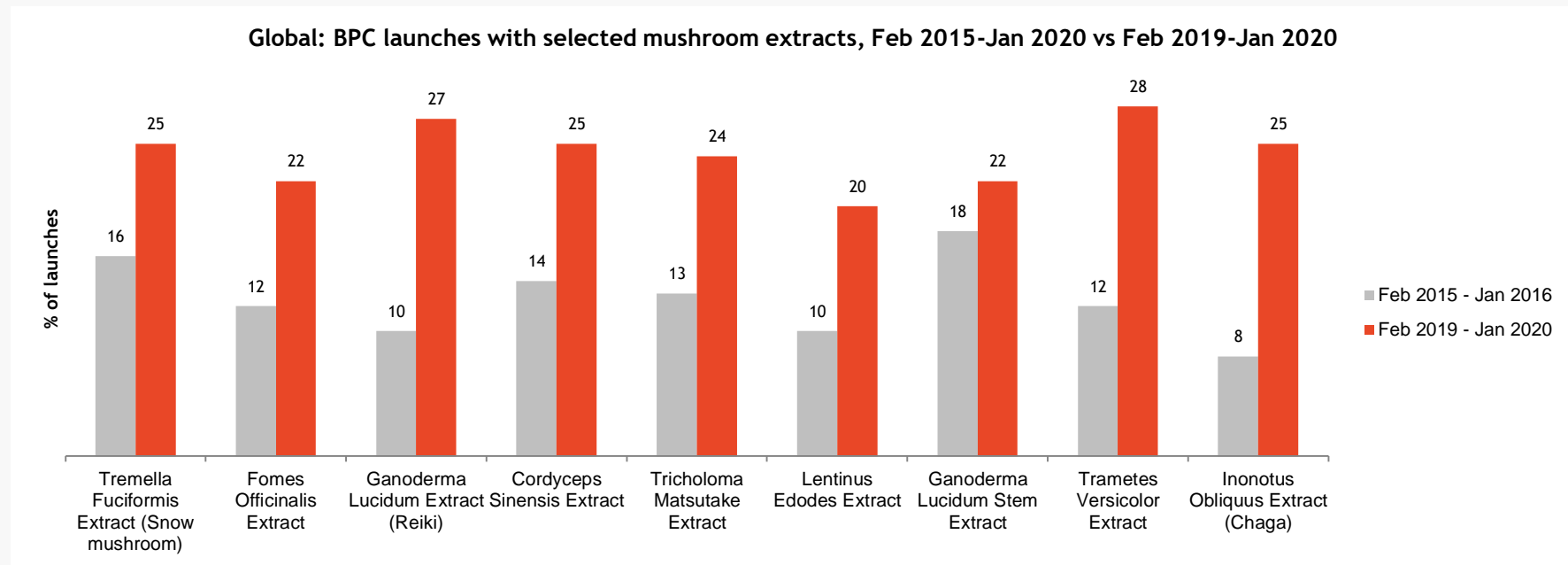
Mushrooms are becoming an increasingly common health and wellness ingredient


**Offer a holistic approach to
beauty**

**Harness mushrooms' rich nutrient
profile**

Focus on wellness benefits

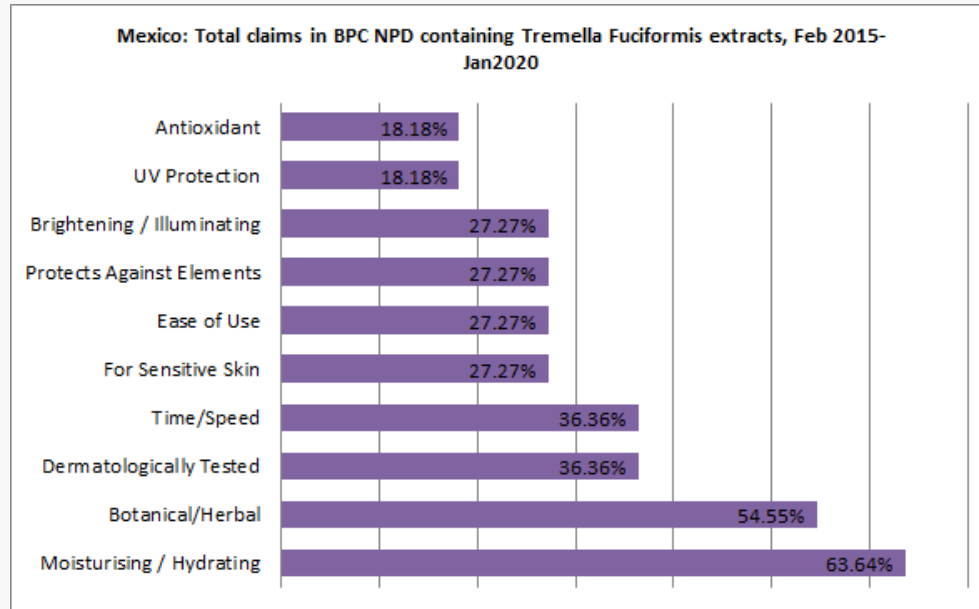
Top 10 mushroom ingredients in NPD





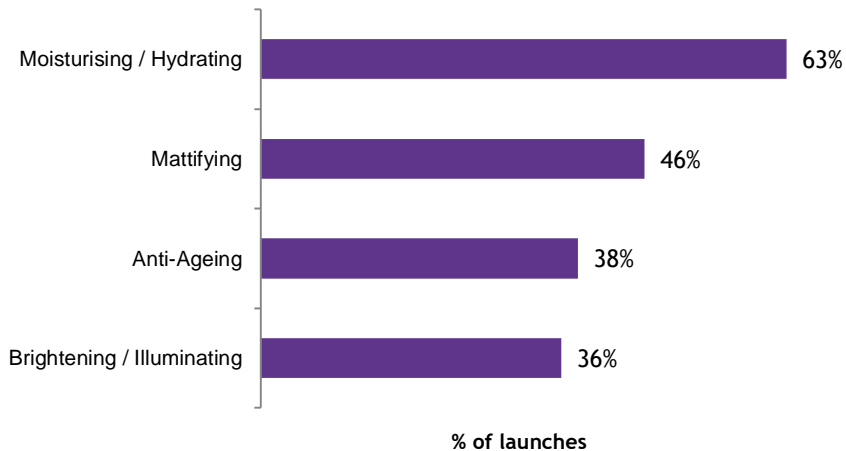
Mushrooms boast a wide range of beauty-enhancing benefits

Tremella fuciformis (snow mushroom) adds a moisture boost



Fomes officinalis can help with managing skin conditions

Global: top claims associated with products containing
Fomes Officinalis Extract as an ingredient, March
2015-Feb 2020



Properties such as **sebum control** and **pore reduction** make it an ideal ingredient for facial care, but also in base makeup products that go beyond a concealing effect.

Base: China: 3,000 internet users aged 20-49 (November 2017)

Source: [Mintel GNPD](#); KuRunData/Mintel

Fomes officinalis enhances facial products with astringent and pore reducing actions



Pore-reducing and mattifying properties

[BeneFit The POREfessional Pore Minimizing Makeup](#) contains fomes mushroom to reduce the appearance of pores and offer an active **mattifying result** beyond cosmetic coverage.



Pore-closing essence

[I Coloniali Hydra Brightening Skin Perfecting Brightening Essence](#) is a cleansing and toning formula with astringent mushroom pulp, which helps close pores and reduce oil production.



Detox pore-tightening mask

[Elizabeth Arden Prevage City Smart Double Action Detox Peel Off Mask](#) includes naturally astringent fomes extract to minimise pores and offer a tightening effect for a brighter, smoother, more refined, pore-less looking complexion.



Crystals and gemstones: because the beauty mood matters

What are the opportunities for crystals?

1

Integrate beauty products into wellbeing rituals

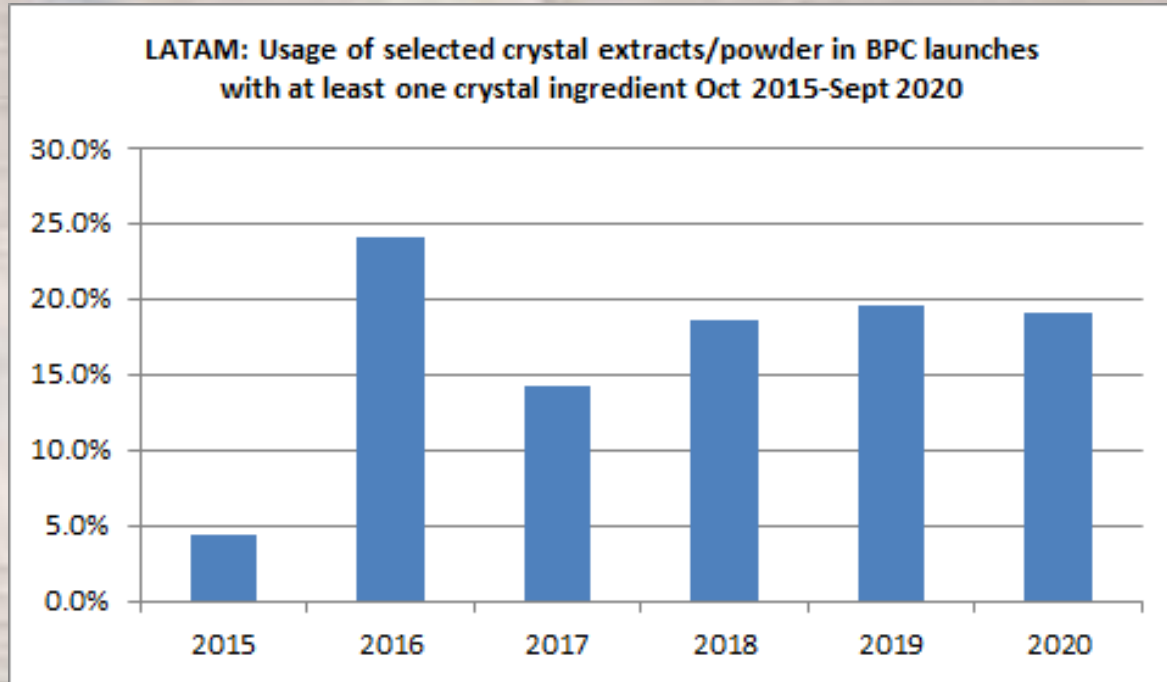
2

Place emphasis on spiritual and emotional benefits

3

Opportunity for customisation

Increasing use of diamond and quartz in new product launches



Reading key: Between 2015 and 2020, the number of product launches in LATAM containing quartz more than doubled in BPC launches containing at least one crystal extract/powder.

Source: [Mintel GNPD](#)

Malachite, Amethyst stone and Tourmaline are increasingly popular ingredients



Malachite offers anti-inflammatory benefits
[Belif Aqua Bomb The True Cream](#) The Aqua Bomb range includes The True Cream, which is described as an ultra-lightweight and includes antioxidant-rich lady's mantle and malachite which help neutralize skin-damaging free radicals.



Amethyst promotes plethora of spiritual benefits
[Pacifica Aromapower Dream State Micro-Batch Perfume](#) is a plant-powered fragrance with notes of lemon, jasmine and amethyst, known as the "stone of spirit" to give the user creativity, intuition and a sense of calm.



Enriched with powerful tourmaline
[L'Oréal White Perfect Purifying & Brightening Milky Foam](#) is enriched with powerful tourmaline gemstone and vitamin C, which has a proven action of melanin synthesis, leaving the skin looking brighter and more transparent.

A row of five Erlenmeyer flasks is shown, each containing a green plant sample submerged in a liquid. The flasks are placed on a metal laboratory rack. The background is a soft-focus laboratory environment. A semi-transparent white banner is overlaid across the middle of the image, containing the text 'MAKE 'CLEAN' A PRIORITY' in a bold, green, sans-serif font.

MAKE 'CLEAN' A PRIORITY

Consumers look for natural ingredients, especially sustainable ones

IN BRAZIL

33%

of female consumers aged 16+ use facial makeup (eg foundation, concealer) that [contain natural ingredients](#)

IN THE US

44%

of women aged 18+ who buy beauty products agree that [natural ingredients are safer](#) than mainstream ingredients

IN THE US

16%

of women aged 18+ are interested in buying [skincare products that have fermented ingredients](#) in them

Base: Brazil: 683 female internet users aged 16+; US: 945 female internet users aged 18+; US: 975 female internet users aged 18+

Source: Lightspeed/Mintel



Consumers in Mexico are looking for natural ingredients

IN MEXICO*

27%

*of people said that they
replaced a regular product with
a natural/organic version in last
3 months*

* taken from Mintel's 35-market consumer research study, July 2020

Base: Mexicol: 1,000 internet users aged 18+

Source: Lightspeed/Mintel





Ferments are a safe alternative to chemicals

Fermented skincare launches continue to grow



Base: * all skincare launches with fermented ingredients as one of the components

Source: [Mintel GNPD](#)

Advertise the use of fermented natural ingredients



Uses fermented rice

[Utena Premium Puresa Rice Ferment Filtrate Skin Conditioning Mask](#) uses fermented rice (rich in amino acids extracted locally in Japan) to hydrate and strengthen the skin's barrier in three minutes.



Sakura ferment formula

[Estée Lauder Micro Essence Skin Activating Treatment Lotion Fresh with Sakura Ferment](#) uses double-flowered cherry blossoms from Japan and sake lees fermented with cherry yeast to help soften and soothe skin and restore youthfulness.



Plants fermented with pure white Shirakami koji

[Albion Flora Drip](#) uses Myurat, an active ingredient derived from five plants (eg *Melissa officinalis*, *Artemisia capillaris*), fermented with pure white Shirakami koji (widely used in Japan to ferment soybean to make miso or soy sauce).

Relieve atopic dermatitis using ferments


1- For example: Truezyme Co has a [patent pending](#) for the use of ***Bifidobacterium*-fermented green tea leaf extract**, along with citrus peel extract, *Laminaria japonica* extract, *Camellia* extract and *Artemisia argyi* extract, to relieve atopic dermatitis symptoms.

2- For example: A [PCT application](#) filed by Amorepacific Corp covers a kaempferol-based compound derived from post-fermented tea, having a melanin production inhibitory effect that is used in skin whitening compositions.

[Lotus Herbals ProBrite Illuminating Radiance Exfoliator](#)

3- Concentrated proprietary Biotic Broths (with "probiotic bacteria plus botanicals, fungi and superfoods") are packed full of antioxidants, anti-stress adaptogens, lactic acid and fungal polysaccharides to nourish the skin and its microbiome.

[biophile: explorer trio](#)

An aerial photograph of a river flowing through a landscape. A large, dense, yellowish-green algae bloom is visible in the center of the river, extending from the left bank towards the right. The water on the left is dark and calm, while the water on the right is lighter and appears to be moving faster. The banks are covered in green vegetation and some rocks.

Algae has potential to supercharge its clean potential

What are the opportunities for algae?

1

Offer a fresh take on naturals

2

Boost core functionality

3

Think outside the box

Not just sustainable, algae can be reusable

IN THE US

41%

of adults have not tried but would
be interested in using
products [made from plant waste](#)

A [collaborative patent](#) between Sun Moon University and Inha University relates to **microalgae left over from biodiesel production** and its use in skincare.

Base: US: 2,000 internet users aged 18+

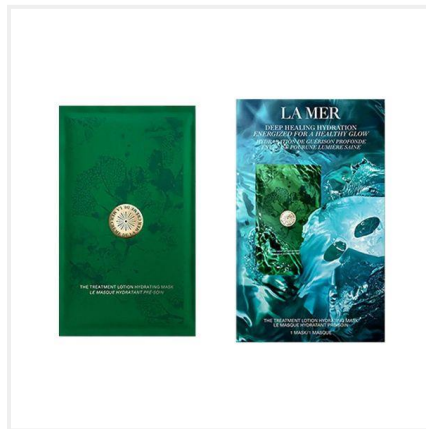
Source: Lightspeed/Mintel; Cipher

Algae already supports some core skincare benefits



Anti-ageing

[Skinfood Aqua Grape Bounce Cream](#) contains fucoidan-rich sea grape, processed with cold-brew technology to maximise the extraction of this active ingredient.



Hydrating/moisturising

[La Mer's Treatment Lotion Hydrating Mask](#) uses the brand's revitalising ferment blend, delivering deep sea hydration in a fusion of algae and 73 sea minerals to revive and replenish the skin's appearance.



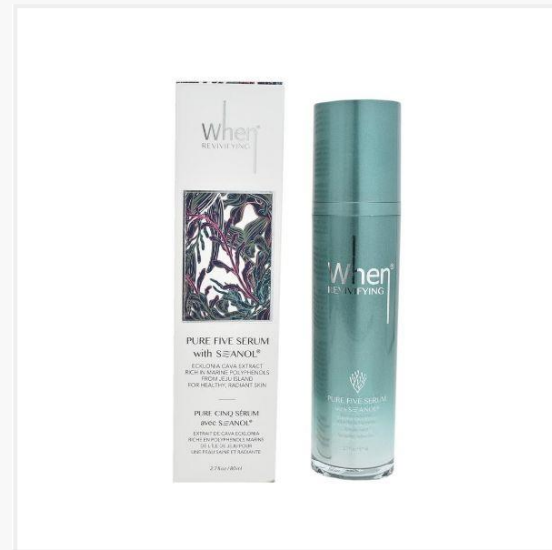
UV protection

[Passion & Beyond Oh, My! Sun Cream](#) uses red algae extract to powerfully protect skin while keeping it moisturised.

Tell collagen-seekers about the unique vitamins and minerals present in algae

Red and brown seaweed especially are known for their **antioxidant and anti-inflammatory properties**, and contribute towards **plumper-looking skin**.

Amorepacific has been granted a patent in South Korea for a cosmetic composition that includes a number of strains of red algae. The composition **regenerates the epidermis and dermis**, improving the appearance of wrinkles by **promoting collagen biosynthesis**.



[When Revivifying Pure Five Serum with Seanol](#)



From less water to waterless

Sustainable initiatives to save our precious resource

IN GERMANY AND ITALY

60%

of [adults](#) have not used water-free BPC products, but are interested in trying them

BY 2030

100%

of [Kao](#) products will leave a full life-cycle environmental footprint that science says our natural world can safely absorb

SHISEIDO AIMS TO REDUCE

30%

of its [water consumption](#) at its production facilities in France by 2030 (reduction rate against the 2009 results)

Base: Germany: 980 and Italy: 983 internet users aged 16+ who have bought beauty and personal care products in the last six months

Source: Lightspeed/Mintel, [Mintel BPC](#)



Focus on water-saving attributes, go water-free and market the eco benefit of waterless formulas



Birch sap instead of water

The [Yoseido](#) waterless skincare range uses pure nutrient-rich natural **white birch sap** - **instead of water** - harvested from forests in Alpine regions above 45°N, and collected with respect to the tree's natural and biological cycle.



Edible ingredients in oral care

Take inspiration from edible beauty like [MiMC ONE Herb Tooth Gel](#), which is safe to swallow if water is unavailable (sea salt, citrus *Aurantium tachibana* peel extract, *Sapindus trifoliatus* fruit extract and *Salix alba* (willow) bark extract).



Free of palm oil to limit deforestation

The [oOlation](#) natural skincare brand advertises many eco/ethical credentials. It is completely free of palm oil derivatives to avoid contributing to deforestation, is vegan, cruelty-free etc. It includes body balm, oil, milk, cream etc.



Lab-grown ingredients: a lens toward 2030

Consumers have turned to science for the truth

IN SPAIN

78%

of women* trust BPC
products/ingredients created by
scientists

IN INDONESIA

87%

of consumers trust products and
ingredients created by scientists;
this grows to 94% for women aged
25-34*

IN AUSTRALIA

49%

of consumers use campaign and
accreditation groups' information
to learn about beauty ingredients,
rising to 57% for ages 18-34*

Base: Spain: 507 female internet users aged 16+; Indonesia and Australia: 1,000 internet users aged 18+ in each country

Source: Lightspeed, Rakuten/Mintel; Dynata/Mintel



Consumers in Mexico are looking for natural ingredients

IN MEXICO*

80%

*of consumers said they trust
products/ingredients created by
scientists when it comes to the
attitudes toward
beauty/personal care products*

* taken from Mintel's 35-market consumer research study, July 2020

Base: Mexico: 1,000 internet users aged 18+

Source: Lightspeed/Mintel



Final thoughts

In the future, the "clean beauty industry" will just be the "beauty industry". Consumers begin to **rely more on their instincts as well as their own knowledge**. Trust comes under fire and **transparency** becomes critical. Consumers will look to leverage technology in order to **hack humanity** and **biological processes**, with science **changing the ageing conversation**. Sustainability initiatives must embrace science as **lab-grown ingredients are the only true path** forward.

Thank you!

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