

# ADINA BEAUTY TRENDS REPORT 2024 - 2025



# WHAT'S SET TO TREND IN 2024 AND BEYOND...

The only constant in the Beauty and Personal Care industry is change, and never more so than now. With AI accelerating at an unprecedented pace and the next generation of consumers (hello, Gen Alpha) taking to beauty, 2024 is set to look like no other.

Values are shifting alongside ethical expectations, **brands are navigating the single, universal, and immersive virtual world that is the metaverse**, and the industry is turning to regenerative beauty as a means to turn the rate of biodiversity loss around.

Join us as we explore how ongoing uncertainty and new challenges are shaping buyer behaviour; **what products are monopolising beauty bags and making the selfie cut**; and where the next generation of influencers are looking to find their next beauty fix.

Expect four bold trends set to evolve in the years to come, several micro trends that are poised for significant growth, and our very own Adina POV.





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# 1

## TECH TAKEOVER

Welcome to the AI-powered revolution. Once an industry built on commodification and sensory experiences, beauty, as we know it, is being re-invented to adapt to the new digital playground: the metaverse. In this section, we explore personalised, data-driven solutions that cater to each customer's individual needs.

P.S. this trend was written in collaboration with ChatGPT.



## TECH TAKEOVER

# CUSTOMISED BEAUTY

The beauty industry is on the brink of a radical transformation, fuelled by the emergence of cutting-edge technologies like **Artificial Intelligence (AI)**. With AI's ability to analyse vast amounts of data and provide customised recommendations, beauty products are being marketed and formulated in new ways that were once unimaginable. **As the global beauty and cosmetics AI market is projected to rise by £10.6bn by 2030<sup>1</sup>**, AI is set to be a game-changer in the beauty industry, enabling the creation of personalised, data-driven beauty solutions that cater to each customer's individual needs.

## Inside-out Beauty

**Neutrogena** has unveiled its own AI-powered custom creation, **360 Skin Stacks**. Developed with supplement maker **Nourished**, the company **uses a 3D printer to produce personalised chewable gummies designed to nourish the skin from the inside out**. To create the custom gummies, the face is scanned and analysed using AI to suggest the vitamins and minerals required for optimum skin health.<sup>2</sup>



## The Perfect Match

**Amorepacific** is at the forefront of the beauty industry's AI-powered transformation. **TONEWORK's Authentic Colour Master is an AI-powered device for recommending optimal makeup shades based on skin tone**. The device can even create and apply makeup, further enhancing the customer experience.<sup>3</sup> The **Mind-Linked Bath bot** is another innovative product by Amorepacific that recommends personalised bath bombs based on customers' brainwaves and emotions.<sup>4</sup>

**Perfect Corp** is also leveraging AI to create personalised recommendations for customers. Its **AI Personality Finder tool** analyses personality traits to match customers with products that suit their personalities.<sup>5</sup> Meanwhile, **Perfect Corp's live skin analysis tool** offers an easy, convenient way for customers to scan and analyse their skin using the camera on their phone or laptop. This tool provides users with **valuable information on their skin age and problem areas** and **recommends skincare ingredients based on real-time analysis**.<sup>6</sup>

## Made for Men

The future of male grooming is personalisation, and AI is the driving force behind it. **78% of men prefer personalised skincare recommendations<sup>7</sup>**, and beauty brands are taking notice. Clinique, L'Oréal, and Nivea have already launched digital tools that offer tailored solutions for men, while **Bull Dog's AI Skin Advisor** takes it to the next level, providing **advice based on skin type and lifestyle factors**.<sup>8</sup> As the male grooming market continues to grow, it's clear that AI is becoming increasingly essential for delivering personalised skincare solutions to male consumers.



## The Adina POV

Nearly half of US-based 25-34-year-olds are willing to spend extra on hyper-personalised personal care products<sup>9</sup>, giving brands a chance to encourage trade-up behaviour and establish strong customer loyalty through tailored recommendations and experiences. As hyper-personalisation evolves, brands will use AI for personalised and automatic rewards, intelligent customer service, and targeted marketing strategies.





## TECH TAKEOVER

# AI AT-HOME

The at-home beauty device market has seen explosive growth in recent years, with a staggering compound annual growth rate (CAGR) of 25.1%. **Valued at \$9.6 million in 2020, this market is expected to reach \$89.5 million by 2030<sup>10</sup>**, driven by technological advancements in artificial intelligence (AI) and augmented reality (AR), as well as the post-pandemic shift towards at-home beauty solutions. Consumers are demanding more personalised, convenient, and effective beauty solutions that they can use in the comfort of their own homes. **Is it time to say goodbye to expensive salon treatments and hello to the future of at-home beauty devices?**



## Beauty On Demand

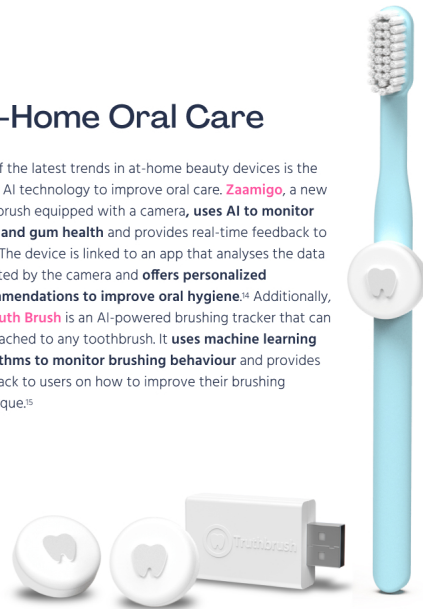
Unveiled at the Consumer Electronics Show 2023, **Brow Magic by L'Oréal** is an at-home beauty device that uses Modiface AR technology to scan the user's face and **provide personalised eyebrow recommendations**. After selecting the ideal shape, thickness, and effect of their brows through the app, the device's 2,400 nozzles print 1,200 drops per inch of eyebrow makeup directly onto the face to create the look. The gadget **utilises non-permanent tattoo technology, making it easy to wash off** with regular makeup remover, and the device also allows the user to save their favourite brow looks and use them as a reference when doing their makeup in the future.<sup>11</sup>

Another cutting-edge product that has captured the attention of beauty enthusiasts is the **Amorepacific COSMECHIP**. This device **creates customised skincare products (from the comfort of your own home) based on data stored on a chip inserted into the machine**. Users can choose their desired texture, scent, and efficacy to create a truly bespoke product. Plus, it **uses regular tap water** to create the formulations, making it a more sustainable and eco-friendly option for at-home beauty.<sup>12</sup>

Haircare is also benefiting from advancements in technology with the introduction of the **Dr. Finger Volume Booster Scalp Massager**. This compact device is designed to **diagnose scalp conditions using AI** and prevent hair loss through targeted massage therapy.<sup>13</sup> By leveraging AI, this product could help to improve the overall health of users' hair and scalps.

## At-Home Oral Care

One of the latest trends in at-home beauty devices is the use of AI technology to improve oral care. **Zaamigo**, a new toothbrush equipped with a camera, **uses AI to monitor tooth and gum health** and provides real-time feedback to users. The device is linked to an app that analyses the data collected by the camera and **offers personalized recommendations to improve oral hygiene**.<sup>14</sup> Additionally, the **Truth Brush** is an AI-powered brushing tracker that can be attached to any toothbrush. It **uses machine learning algorithms to monitor brushing behaviour** and provides feedback to users on how to improve their brushing technique.<sup>15</sup>



## The Adina POV

The at-home beauty device market is soaring, thanks to the evolution of AI and advanced technologies. As these devices continue to learn and improve, they offer increasingly personalized and effective solutions to consumers seeking safe, convenient, and flexible beauty treatments. **But will traditional in-clinic and salon treatments become a thing of the past? We don't think so. The future of beauty is a seamless blend of both worlds.** To stay relevant, be sure to formulate products that can keep up with this shift.



## TECH TAKEOVER BETTER BEAUTY

With the continuous collection of data through hyper-personalisation and continuous learning, the possibilities for AI in beauty innovation are exponential. Companies can use this powerful tool to "listen" to consumers and understand their needs, allowing them to create better products and services. This data-driven approach to product innovation has been proven successful in multiple industries, and beauty is no exception.

### Continuous Innovation

**Scentmate®** by **dsm-firmenich** is an AI-powered fragrance house that uses machine learning to streamline the creative process of fragrance creation.<sup>16</sup> It analyses vast databases of perfumes, customer preferences, and market trends to co-create potential scent combinations. The system collects data on the perfumes created and how customers respond to them, allowing it to **continuously refine** its algorithms and suggestions. **Boticario Egeo** and **Symrise**, another AI-perfumery, unveiled the world's first **AI-powered** line of vibrant fragrances. **Symrise**, similarly, uses their data to further innovation in fragrance creation.<sup>16</sup>



### Big Data

**ASLEEP** is another company leveraging the power of AI to progress innovations in the beauty and health space. Their **Sleeptrack API** offers the highest accuracy of sleep detection without requiring a smart device and utilises AI to provide customised and tailored solutions based on users' individual sleep patterns and preferences. **The data collected by the technology will enable ASLEEP to create more effective and finely tuned beauty and health products** that are designed to help consumers look better, sleep better, and enhance their overall well-being.<sup>17</sup>

**Align Technology**, the company behind the Invisalign treatment, is a prime example of how AI and big data are transforming the orthodontic industry. With over 12 million cases under their belt, Align Technology **uses AI to harness the power of this big data to help their doctors plan predictable treatment outcomes for their patients**.<sup>18</sup> Also, their innovative **Smile View app** takes data collected from 7.5 million successful Invisalign installations to create hyper-realistic before-and-after simulations, so patients can now visualise their end results before treatment even begins.<sup>19</sup>

### SUPPLIER SPOTLIGHT ALGAKTIV®

**Algaktiv** are harnessing the transformative potential of AI by utilising **ChatGPT** to revolutionise their regulatory processes. The company leverage the platform to gain valuable insights into **country-specific legislation**, navigate complex regulatory landscapes, and expand their compliance knowledge. Additionally, their AI-driven analyses **fuel sustainable practices**, reducing the company's carbon footprint.

### The Adina POV

Machine learning can make more sense of how products and routines fit and interact in consumers' lives as a whole and companies can lean into this data to advance beauty products, services, and technology.

**The use of big data from different industries is the next step in AI-driven innovation**, especially as quantum computing has the potential to **analyse** these data sets with much more precision, allowing for even more personalised and effective beauty solutions.

## TECH TAKEOVER

# THE META-INFLUENCER



The AI-powered revolution is changing the landscape of the beauty industry at a rapid pace, and the use of virtual influencers is one trend gaining massive traction. With **China's metaverse market forecasted to hit \$5.79 trillion by 2030**<sup>20</sup>, it's no wonder that more brands are turning to digital ambassadors to promote their products. With data revealing that **meta-humans receive three times more engagement on social media than human influencers**<sup>21</sup>, the public is seemingly becoming more accepting of virtual beings. Could this be the beginning of the end of influencing as we know it?

## Virtually Influenced

**Maybelline New York** was one of the first brands to recognise the potential of virtual influencers to connect with their target audience. Their latest ad campaign for **Falsies Surreal Mascara** featured a **virtual influencer alongside real-life model Gigi Hadid**.<sup>22</sup> By partnering with a virtual influencer, Maybelline New York was able to create a **jarringly futuristic** ad appealing to a younger, more digitally-native audience.



**Urban Decay's Yue Sai** brand also recognised the power of the virtual influencer and created an **avatar named Yuxixi** for the Maybelline New York metaverse space.<sup>23</sup> With a striking appearance, featuring bold makeup and edgy styling that appeals to Urban Decay's target audience, **her role is to engage with consumers and provide personalised recommendations for makeup products** based on their individual preferences and needs.

Even established luxury brands like **LVMH** are getting in on the virtual influencer trend, creating a **virtual influencer who hosted the LVMH Innovation Awards 2022** and acts as a brand ambassador on innovation tech.<sup>24</sup>

**Nars** took a different approach with their virtual brand ambassadors, creating **meta-humans inspired by their lipstick line**.<sup>25</sup> These virtual influencers were designed to **challenge unrealistic beauty standards and celebrate underrepresented groups in the metaverse**. By using virtual influencers, Nars was able to connect with consumers who are increasingly looking for brands that align with their values and beliefs.

## AI-Powered

**Baidu**, China's leading search engine, has taken AI to the next level by introducing the **world's first AI emotional healers**. These virtual companions **provide 24-hour assistance and emotional support** to people who may be experiencing mental health issues.<sup>26</sup> This development could **pave the way for more AI-powered virtual avatars and influencers in the future**, greatly expanding the possibilities for brands to connect with their audiences, through higher levels of personalisation and interaction.



## The Adina POV

**AI influencers are the future of the beauty industry.** With the rise of the metaverse, increasing acceptance of virtual beings, and the cost of hiring traditional influencers skyrocketing, it's only a matter of time before more brands embrace this trend. **The benefits of using AI influencers are clear - high customisation, brand control, and personalised interaction** meaning that as we move forward, expect to see more of these beings taking over your social feeds...if you'll notice them.



## TECH TAKEOVER

# WHAT'S NEXT



The beauty industry is on the cusp of a new era with the proliferation of artificial intelligence (AI). With the ability to provide personalised recommendations, leverage big data, and produce advanced products, the potential for innovation is limitless. But what does the future hold for beauty in this rapidly evolving landscape?

## The AI Takeover

As AI continues to revolutionise the beauty industry, the question arises: **will it eventually replace us?** While AI excels at tasks such as product development, customer service, and marketing, it **lacks the qualities of creativity, empathy, and intuition** that are essential to the industry. It's likely that a balance between AI and human involvement will be necessary to provide a unique and personalised experience for consumers.

## Can We Trust AI?

AI's benefits to the beauty industry come with a caveat: **transparency concerns**. The rise of virtual influencers has only exacerbated the issue, as these lifelike beings blur the line between real and virtual.<sup>27</sup> Consumers may be left in the dark, unsure if they're following a real person or an AI creation. Also, the data behind these virtual influencers can **perpetuate beauty industry biases, promoting unattainable ideals that harm consumer confidence**. As AI technology continues to advance, expect to see more regulatory controls putting transparency and fairness at the forefront.

The beauty industry's reliance on AI brings with it more concerns surrounding the insidious perpetuation of biases. **Limited data sources and skewed algorithms** can lead to a **lack of diversity in products, advertising, and campaigns**. This narrow-minded approach not only promotes unrealistic beauty standards but also excludes those who do not fit the mould. **AI must be developed with diversity and inclusion** in mind to break free from this.<sup>28</sup>

## Industry 5.0

The beauty industry is evolving rapidly towards Industry 5.0, **fusing digital and physical experiences** for a truly personalised and sustainable customer journey. This revolutionary approach combines humans, machines, and data to create a collaborative and flexible manufacturing process.<sup>29</sup> The results are **ground-breaking**, as demonstrated by **Droplette**, a company already harnessing principles of Industry 5.0. The company leverages fluid dynamics, the piezoelectric effect, and Fick's diffusion laws (get googling!) to **create micro-droplets that penetrate the skin 20 times deeper**.<sup>30</sup> Meanwhile, **Opte** has taken personalisation to the next industry level with their **makeup-skincare 'printer', which scans the skin and blends a custom foundation and serum** for each individual.<sup>31</sup>



## A Necessary Pause

The exponential growth of AI and technology has left many feeling the need for a **digital detox**. **As consumers crave disconnection, innovative products are emerging to meet that demand**. Meanwhile, **The Whole Truth Foods** took the ultimate step in 2022 by announcing an indefinite break from Instagram due to the constant trend-chasing.<sup>32</sup> Beauty brands are also getting in on the action, with products like **Sarah Chapman's** Digital Rest Night Moisturiser designed to **protect the skin from blue light**.<sup>33</sup> As technology continues to dominate more of our lives, it's clear that digital detoxing will become an increasingly important trend, **reminding us to unplug and recharge**.

## INGREDIENT SPOTLIGHT

### SHIELD BLUE LIGHT WITH BLUEBERRY NECTA®

Made from **upcycled blueberries**, Blueberry NECTA® is an antioxidant-rich active oil that **shields the skin from blue light** exposure. Rich in essential fatty acids and protective phytosterols, together with a standardised level of carotenoids, it protects against oxidative stress. It's also a **natural source of pro-retinol**, making it particularly ideal for blue light protection skincare.



## 2

# SUSTAINABLE... SO WHAT?

Consumers want more. They want full-transparency, universally-designed products and a circular economy. This has driven forward-thinking brands to reimagine their purpose, focusing on being good instead of doing good. In this section, we explore how beauty is challenging industry norms by scrapping tokenism and raising the baseline expectation of sustainability.



## SUSTAINABLE...SO WHAT?

# PLATFORMS FOR GOOD

More and more brands are **going above and beyond to provide sustainable services and transparent information** to consumers. But is this baseline expectation enough for the next generation? A recent survey revealed that Gen Zs are challenging industry norms and driving brands to reimagine their purpose, with **73% of respondents claiming to buy or advocate for brands based on their beliefs and values**.<sup>34</sup>

## Holistic Sustainability

One way brands are connecting with new audiences is by **embracing a circular economy**. In our current economy, we consume materials from the Earth, manufacture products from them, and discard them as waste. Contrary to this take-make-waste system, the circular economy **prevents waste from being produced in the first place**. Underpinned by renewable energy and materials, the circular economy is a **restorative framework** that tackles both climate change and addresses important social issues, and it's going mainstream.



Powering the shift to a circular economy, **global standards have been set up to transform the way products are designed and made**. Regarded as the world's most trusted standard for sustainability performance, the **Cradle to Cradle Certification**<sup>®</sup> allows consumers to find out whether products are **safe, circular, and responsibly made**.<sup>35</sup> Meanwhile, the **B Corp Beauty Coalition** is a new approach to beauty that aims to **prioritise our soil as much as the skin**.<sup>36</sup>

## Black-owned Leaders

The **ultimate gold standard in sustainable beauty** has seen **black-owned brands spark change for both the climate and culture**. The zero waste skincare brand, **Melanin Essentials**, not only uses **Loop** to professionally clean and reuse packaging, but **tackles climate change bias towards people of colour and those with lower incomes**.<sup>37</sup> **Yala** is another B Corp that's leading the way in sustainable stewardship. The mission-led jewellery brand manufactures all of its products using reclaimed and recycled raw materials, and **works to improve the lives of women in rural communities through financial empowerment and skills training**.<sup>38</sup>



## Collaborative Efforts

Doing more for both the community and the planet, several brands in the beauty space are **fighting for collective change**. While **Beauty Kitchen** is driving cross category collaboration to create a **universal, professionally refillable packaging platform**,<sup>39</sup> **The Upcycled Beauty Company** is building a future where **all beauty products are made from upcycled ingredients**. By providing access to an Upcycled Ingredients Directory; spotlighting brands, packaging and ingredients; as well as publishing an annual Zero Waste Beauty Report, **they encourage the industry to work together to reimagine waste**.<sup>40</sup>

## Platforms for Good

Other companies have **used their platforms to deliver genuine benefits to wider communities**. While LA-based clothing brand, **Madhappy**, launched **The Local Optimist**<sup>™</sup> as a mental health-centric toolkit for those seeking free and accessible resources, **August Period Products** is a **carbon neutral, inclusive brand raising voices of those who menstruate**.<sup>41</sup> Partnered with **No More Secrets**, they push period education, decrease stigma, and sell products without the tampon tax.<sup>42</sup>



## SUPPLIER SPOTLIGHT

### dsm-firmenich ●●●

dsm-firmenich champions sustainability with their innovative Sustainability Imp/ACT Card<sup>™</sup>. The card provides transparent data on **environmental and social impact, traceability**, and certifications for each product. By openly acknowledging what's not perfect, dsm-firmenich demonstrates their commitment to always improving and striving for greater sustainability. This approach aligns with the **UN's Sustainable Development Goals**, setting a new industry standard.

SUSTAINABLE...SO WHAT?

# REGENERATIVE BEAUTY



Regenerative skincare is thought to be the missing link in our skincare routine.<sup>43</sup> Creating buzz in the farming industry, regeneration is the topic of 2020 Netflix documentary, *Kiss the Ground*, and Allan Savory's viral TED Talks.<sup>44</sup> While the **UN expects we have just 60 harvests left until topsoil is gone**, Savory says **regenerative agriculture could be the answer and "reverse" climate change**. Regenerative methods focus on reducing soil disturbance, cultivating crop diversity, and avoiding fertilisers or sprays.

## Investing in Nature

To help turn the rate of biodiversity loss around, many are financing the transition to regenerative agriculture. **This year marked the start of the New EU Common Agricultural Policy.**<sup>45</sup> With €264 billion in funding, the new CAP will support farmers towards the transition to sustainable and resilient agriculture. **32% of the funding will be devoted to climate, water, soil, air, and biodiversity.**



## Beauty Is in the Soil

Agriculture isn't the only industry that sees beauty in soil as **brands propel the regenerative movement beyond food and nutrition, and into the personal care sector**. **Natura & Co**, the parent company of Body Shop and Avon, has funded **\$100 million in regenerative solutions**.<sup>46</sup> They pledge to develop biotechnology, reduce the use of synthetic chemicals, create an alternative to monocultures, and formulate new ingredients that are more economically attractive than deforestation.

In 2021, sustainable hair care brand, **Davines**, joined forces with the **Rodale Institute**, a non-profit that supports research into soil health.<sup>47</sup> Together, they formed the European Regenerative Organic Centre where researchers **focus on small to medium-sized farms growing specialty crops for food, nutrition and beauty**.

Another brand going beyond sustainability is **Lush** with its **Regeneration perfume** gift set.<sup>48</sup> On a mission to leave the world lushier than we found it, the cosmetics retailer uses a regenerative ingredient for each scent.

## From Farm to Fashion

Everyday, we're seeing new, and exciting ways to grow the regenerative movement. While clothing store **Reformation** claims to use **100% traceable NATIVA(TM) wool sourced from regenerative farms** in its knitwear, **Patagonia** is putting pressure on the US congress to safeguard biodiversity.<sup>49</sup> The brand asks site visitors to act now and **pledge their support for protecting 30 percent of nature by 2030**.<sup>50</sup>



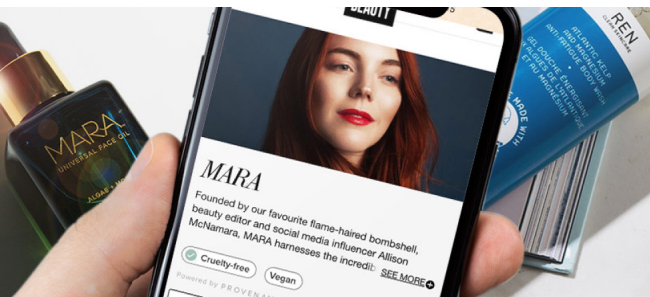
## SUSTAINABLE...SO WHAT?

# TRUSTED TRACEABILITY

Did you know 94% of consumers think brands should be more **transparent**, and 71% will be willing to spend more on brands that provide product traceability?<sup>21</sup> To meet the rising demand for full and complete transparency, **beauty is adopting blockchain technology**. Blockchain is a distributed database that is shared among the nodes in a computer network, storing information in a digital format. This tech guarantees the fidelity and security of a record of data and generates trust without the need for a trusted 3rd party.<sup>52</sup> Decentralised by nature, **blockchain guarantees information is accessible to everyone and cannot be modified**.

## First of its Kind

In 2019, **Cult Beauty** and **Provenance** teamed up to introduce blockchain to the beauty industry.<sup>53</sup> Launched to combat greenwashing, the next-gen collaboration adopted software known as “**proof points**” to allow businesses to prove their impact in a way that’s **trusted** and can be easily communicated to consumers. Since launch, over **50% of the products on the website now have a proof point**, with even higher numbers predicted for 2024.<sup>144</sup>



## Farm to Face

Taking blockchain technology one step further, **Clarins T.R.U.S.T** is a platform that **allows users to access the entire preparation and manufacturing process of each skin care product** including the exact plants used, locations, certification, and harvesting methods.<sup>54</sup> Tracing products **from the field all the way to the face**, the certified blockchain technology sees shoppers trace 51 Clarins products, simply by entering the batch code online or scanning the QR code on the product.<sup>55</sup>

Another brand going above and beyond to **offer consumers full transparency** is **Clever Beauty**. The clean and anti-waste nail polish brand partnered with **Sorga Technology** to create a traceable supply chain.<sup>56</sup> **Each nail polish bottle has its own code which consumers can access as a unique product “passport.”** This passport showcases who is behind the product, where it’s manufactured, what it contains, as well as well-informed certification information.

## INGREDIENT SPOTLIGHT

### UPCYCLED ANTI-AGING WITH AC OLEASHIELD

Enter AC OleaShield, the **revolutionary anti-aging solution** that helps you look and feel younger, all while helping the environment! Powered by a **zero-waste spirit** and made from **upcycled olive leftovers**, experience the power of nature with AC OleaShield which helps **reduce wrinkles and restore skin elasticity**.

### TRACE FROM FARM TO FACE WITH LIPONATE™ JOJOBA 20

Experience the power of Liponate™ Jojoba 20. Crafted from **sustainably sourced and fully traceable jojoba**, this versatile ester imparts velvety softness and effortless application. Experience **enhanced hydration, reduced redness, and heat protection with remarkable stability and compatibility**. Elevate your skincare routine with this COSMOS-approved innovation, redefining sustainable beauty for face, body, makeup, hair, and sun care.

## The Adina POV

Imagine a world where the beauty industry is powered by the perfect blend of cutting-edge technologies: **Blockchain and AI**. These game-changers have the potential to go **beyond buzzwords**, revolutionizing supply chains with efficiency, traceability, and transparency. **In an era where sustainability is paramount, companies must step up and prove their true commitment.**<sup>57</sup>

## SUSTAINABLE...SO WHAT?

# ACCESSIBLE BEAUTY

Inclusivity and diversity in the beauty industry has largely overlooked the needs of the disabled community. But now, more than ever, we're seeing beauty brands move beyond buzzwords by creating products that are more accessible to those with disabilities.<sup>58</sup>

## Accessible Tech

This year, **L'Oréal** pioneered the makeup applicator 'Hapta' which is designed for people with limited hand and arm mobility.<sup>59</sup> The handheld device uses smart precision technology to stabilise and level the applicator, allowing for easy ergonomic use with 360-degree rotation and 180-degree flexion.



## Universally Designed

Another brand who is creating a culture of empowered beauty is **Guide Beauty**.<sup>60</sup> "Often the disability is in the design, not the person," said Terri Bryant, celebrity makeup artist and founder of Guide Beauty. From beginners learning new techniques to those who have challenges with movement or strength, **this line is universally designed and ophthalmologist approved**. Their **Guide Eyeliner Duo** is reaching cult status by creating the perfect cat eye every time!<sup>61</sup>

Home to the original motor disability support makeup brushes, **Kohl Creatives** is an inclusive brand that caters to everyone including people with existing conditions such as vitiligo and alopecia, as well as victims of accidents.<sup>62</sup> In 2020, they launched their line of **makeup brushes for individuals with motor disabilities and visual impairment**. The collection comes with an audio guide and features a non-rolling cuboid handle.



## Adapting Brands

Brands aren't just reimagining products but also adapting their packaging and online content for the disabled community. While the likes of **Bioderma**, **Olay** and **Dr. Jart** have added Braille to their packaging, **Two Faced** has launched a **free assistive technology app** to help those who have trouble typing, gesturing, moving a mouse, or reading.<sup>63</sup>

## Inspiring the Next Generation

Beauty isn't the only industry that's getting a make-over as **Mattel** is ever-expanding inclusivity in the fashion doll aisle with a **new diverse line-up of Barbies** that includes fashionistas with underrepresented careers, skin tones, hair styles, body types, and disabilities.<sup>64</sup> This year, they launched its first-ever doll with **Down's syndrome**.

**Ellie Goldstein**, the UK ambassador for the doll, is also among the five cover stars of the "**Reframing Fashion: Dynamic, Daring & Disabled**" edition of **British Vogue** that focuses on 19 disabled people from the worlds of fashion, sport and the arts.<sup>65</sup> The magazine collaborated with the **UK's Royal National Institute of Blind People** to produce a braille version of the issue, which can be accessed digitally or via audio.





## SUSTAINABLE...SO WHAT?

# WHAT'S NEXT



## Sustainable...so what?

**Sustainability checkboxes are becoming a prerequisite**, driven not only by consumer demand but also by government regulations. As the world becomes more conscious, **sustainability regulations are gaining prevalence**, becoming stricter, and carrying more significant consequences.

While the government has **increased plastic tax by over £10 per tonne in the UK<sup>66</sup>**, the European Green Deal is putting an end to wasteful packaging.<sup>67</sup> The new EU-wide rules aim to increase reusable packaging options, reduce unnecessary packaging, limit overpackaging, and provide clear labels to support correct recycling. **This shift will force brands to distinguish themselves through alternative means and go beyond mere marketing of sustainable practices.** True leaders will take responsibility for their production, going above and beyond, rather than waiting for legislation to catch up.

## Collaboration is Key

Formed by **WRAP** and **The Ellen MacArthur Foundation**, the **Plastics Pact**, is a collaboration that has brought together the UK's leading supermarkets, brands, and packaging sectors with the shared objective of **transforming the flawed plastics system by 2025<sup>68</sup>**.



Big brands signing up to the Plastic Pact have already reimagined some of their most iconic products, challenged preconceptions, and made big changes to improve the recyclability of their packaging. While **Mars Food has unveiled mono polypropylene for its Uncle Ben's rice packs** and are trialling **paper wrappers for their chocolate bars**, **Morrisons** eliminated all black plastic from its own brand items. Since the inception of the Pact, **recycled content levels in plastic packaging has doubled**, preventing carbon emissions and saving over a million barrels of oil. **Power truly lies within collective efforts.**

## Infinite Beauty

Food isn't the only industry getting a makeover, as many beauty brands turn to refillable packaging. **"If refill designs were to be applied to all bottles in beauty and personal care, packaging and transport saving alone would represent an 80-85% reduction in greenhouse gas emissions,"** said The Ellen MacArthur Foundation.<sup>69</sup>

One beauty brand that's turned to refillable packaging is **KANKAN**.<sup>70</sup> Essentially soap in a can, they have **created daily essentials that can be recycled time and time again**. Their soap refills are **packaged in an aluminium can**, presenting customers with a refill system that is readily recyclable at home. This approach **promotes an almost endless lifecycle as 75% of all aluminium produced is still actively utilised today**.<sup>71</sup> To take their sustainability initiative one step further, KANKAN plants a tree for every can sold.



## Intersectional Environmentalism

**Intersectionality** is a way of examining issues to understand how characteristics such as race, place, age, gender, and geography intersect with each other and interact with power structures to create and reinforce power, privilege, disadvantage, and discrimination.<sup>72</sup> Sparked by black feminist activists, **the intersectionality movement provides a more complete and honest picture of the multiple factors that shape people's everyday lives.**

By taking the time to understand intersectionality, brands can see **how climate change can affect individuals with multiple vulnerable identities more**. This can be achieved through **actively listening to and engaging with communities** that directly experience injustices. To steer clear of "bandwagoning" and maintain authenticity, brands must rise to the occasion and **take the lead in designing solutions with the intersectional lens in mind.**

# 3

## BIG SCIENCE

The lingering effect of the pandemic and uncertain economy has driven new buying behaviours as consumers become even more curious about the products they buy; a household name or vague promise is no longer enough. It's the science behind the formulations. It's the expert influencer they trust, and it's the unwavering transparency they value. In this section, we explore how brands rise to meet consumer demands for claim validation and efficacy.





## BIG SCIENCE

# THE CURIOUS CONSUMER

Consumers are no longer content with empty claims and marketing gimmicks. Fuelled by economic uncertainty and a quest for transparency, they are demanding more than just promises, fervently **seeking claim validation, efficacy, and an abundance of evidence-based information** to empower their search for reliable skincare insights. A staggering **73% of Chinese women are actively paying attention to beauty ingredients and find it exciting to learn about the science behind different products.**<sup>73</sup> As the demand for efficacy and evidence-based beauty skyrockets, a **fiercely engaged consumer** base has embraced the responsibility of becoming well-informed about all things skin.

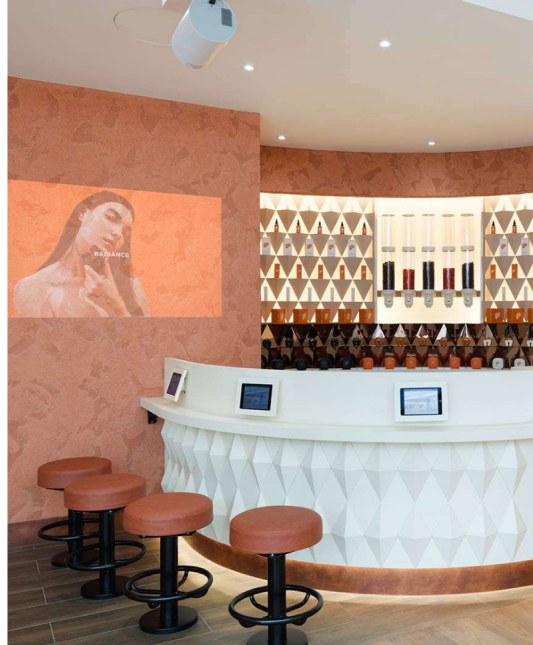


Need moisturizer  
texture?



Dr. Adeline Kikam, FAAD

Board Certified Dermatologist



## The Expert Influencer

In a world where influencers and sponsored content dominate the beauty scene, a **new breed of expert influencers** has emerged to cut through the noise. **Dermatologists and skincare professionals** are harnessing their expertise to offer trustworthy advice, and platforms like Instagram and TikTok have become their virtual podiums, providing the perfect stage to educate and empower consumers.<sup>74</sup>

**Dr. Shah**, better known as **DermDoctor**, boasts an astounding **17.9 million TikTok followers**, gripping audiences with his informative and undeniably captivating videos...think Dr. Pimple-Popper!<sup>75</sup>

Similarly, **Brown Skin Derm** has amassed an Instagram following of 113k and a significant TikTok presence, filling a crucial gap by providing **specific skincare guidance for people of colour.**<sup>76</sup> These expert influencers serve as **beacons of authenticity and authority** to the newly engaged consumer in a **landscape filled with #ads and questionable advice.**

## At-Home Diagnostics

Consumers now have an unprecedented array of **cutting-edge at-home diagnostic tools at their fingertips**, enabling them to unravel the mysteries of their skin like never before. **Gallinee's Skin Health Testing Kit** utilises the power of **quantitative real-time PCR** to delve into the depths of the skin microbiome, delivering comprehensive diagnoses that leave no stone unturned.<sup>78</sup>

**Pure Culture**, a brainchild of Target, equips individuals with skin test kits capable of **scrutinizing the skin barrier**, paving the way for tailor-made skincare products that harmonize perfectly with individual needs.<sup>79</sup> **Dr. Elsa Jungman's** revolutionary **Skin Microbiome Test Kits** harness the intelligence of **AI algorithms to curate precise skincare ingredient recommendations.**<sup>80</sup>

Meanwhile, the ingenious **Pudäs+ DNA Skin Tests** decode genetic characteristics, unveiling personalised skincare revelations that unleash the full potential of each **individual's unique genetic blueprint.**<sup>81</sup> These ground-breaking at-home diagnostics have **given consumers the power to make informed choices** and create skincare routines that cater to their own unique and evolving needs.

## The 360 Approach

For the most discerning and engaged consumers, a revolutionary concept has taken the beauty world by storm: **the 360 approach.** **Dr. Valli's 360 Experiential Centre**, located in Selfridges, offers personalised **outer and inner biohacking programs** curated by experts.<sup>82</sup> This immersive journey combines skincare treatments with tailored wellness practices, ensuring a comprehensive approach to beauty. **Expect to witness an increasing number of these holistic experiences**, indulging the curious consumer with the knowledge to make informed choices like never before.



## BIG SCIENCE

# SCIENCE MEETS STRATEGY

The beauty industry is in the midst of a powerful transformation as **brands rise to meet consumer demands for claim validation and efficacy**.<sup>83</sup> With a relentless focus on delivering results and unwavering transparency, forward-thinking companies are revolutionizing the beauty experience. **Prepare for a paradigm shift where efficacy and transparency reign supreme**, empowering consumers to make more confident and well-informed choices than ever before.

## Full Transparency

One of the key ways brands have been embracing transparency is through **leading with their ingredients on the front of their packaging**, giving consumers a clear understanding of what they are putting on their skin.

**The Ordinary**, a seasoned trailblazer in this approach, gained popularity by **boldly labelling their ingredients** without hiding behind empty synonyms. Their accessible resources and guides on their website empower consumers to make informed choices about their skincare routine.<sup>84</sup>

Similarly, **Paula's Choice** adopts the tagline **"Beauty begins with truth"** and publishes active ingredients prominently on their packaging, catering to fact-checkers and those who dig deeper for authenticity.<sup>85</sup>

## Science-Led

Beauty brands are **harnessing the scientific might behind their products to inspire unwavering consumer confidence**. Take Australian sensation, **About Time We Met**, for example, which fearlessly leads with the science behind their ingredients, providing accessible studies right on their website.<sup>86</sup>

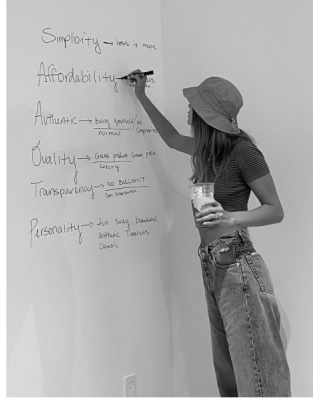


Meanwhile, **Boots No.7 Future Renew Range** is making waves with an anti-ageing line grounded in a staggering 15 years of scientific research, conducted by world-renowned experts. They even **pull back the curtain with videos featuring Dr. Mike Bell**, allowing consumers to dive into the science behind their innovations.<sup>87</sup>

**Rhode by Hailey Bieber** takes it a step further, focusing on research-backed ingredients and **enlisting the expertise of a renowned cosmetic chemist and dermatologist** on their advisory board.<sup>88</sup> Not to be outdone, **Chanel Beauty** reveals the secrets of their laboratories and R&D efforts, showcasing their commitment to scientific excellence.<sup>89</sup>

## Powerful Partnerships

In the race to deliver unrivalled claim validation, brands are stepping up their game by **forging strategic alliances with prestigious institutions and industry experts**. A standout example is **Kosé's** ground-breaking collaboration with the **Institute of Statistical Maths in Japan**.<sup>90</sup> By joining forces, they're **pioneering a predictive model that will revolutionize how beauty brands cater to consumers' changing skin conditions as they age**.



## INGREDIENT SPOTLIGHT

### HARNESS THE BRAIN SKIN AXIS WITH **SPRING SNOW™**

Harnessing ground-breaking new research linking internal and external stress to the condition of the skin, **Spring Snow™** works to reinforce skin barrier function in stressful situations. The active not only **limits hypersensitivity of nerve fibres and neurogenic inflammation** for better skin comfort, but also relieves and soothes skin against the detrimental effects of pollutants.

### SUPPORT SKIN'S MICROBIOME WITH THE **FERMBIOTIC® SERIES**

Experience unparalleled hydration and enhanced collagen production **in the skin** with the revolutionary **Fermbiotic® series**. Derived from extracts and microorganisms, these microbiome-supporting complexes **undergo fermentation to unlock exceptional bioavailability**.

### UNLOCK THE SENSE RECEPTORS WITH **AC AMARASENSE**

Similar to our tongue and nose, **new research** has shown that the skin has some taste and olfactory receptors, causing a calcium influx within the skin. The all-new **upcycled active blend, AC AmaraSense** takes inspiration from this action by **boosting intracellular calcium levels**, and providing **deep hydration and nourishment** to the skin.

## The Adina POV

Beauty brands that prioritize transparency are reshaping the industry. By harnessing the power of science, these brands not only meet consumer demands but also **empower individuals to make informed decisions** about their beauty routines. As the industry continues to evolve, the **marriage of science and consumer insights** will undoubtedly pave the way for a more personalised and effective future in beauty.



# BIG SCIENCE THE BIOTECH BOOM



With demand for ethical and sustainable products reaching unprecedented heights, industries are under immense pressure to deliver solutions that align with these values. **Biotechnology has emerged as a game-changing alternative**, providing a **sustainable and scalable approach to product development and production**. By tapping into the potential of biotech, scientists can decode the genetic blueprints of diverse flora and fauna, replicate their remarkable properties in a lab, and craft eco-friendly products that cater to the needs of conscientious consumers. **As barriers surrounding the use of biotech in beauty crumble**, a new era of responsible innovation is here.<sup>91</sup>

## Bio-Led Beauty

At the forefront of the biotech boom in skincare, **Biossance** leads the movement with its range of serums and creams, **powered by 100% botanical squalane**. Derived from renewable sugarcane bio-fermented using its own yeast, these products deliver **enhanced skin elasticity and unparalleled hydration**.<sup>92</sup> The brand's unwavering commitment to sustainable sourcing showcases a new era of effective, sustainable skincare.



Straight from Sweden, **L:A Bruket** fuses biotech wonders with natural elements of the Swedish coastline and forest. Enter their **278 Hydra-Firming Sea Mist, powered by Algica®** – an eco-hero grown in greenhouses. This super ingredient not only **absorbs CO2 and purifies water**, but also **yields precious organic by-products**.

## Sustainable Protein

Biotech's impact is extending far beyond the beauty industry. Enter companies like **Eat Just**, paving the way in developing lab-grown meat. In a ground-breaking milestone, their **lab-grown chicken, created from animal cells, received FDA approval** in late 2022.<sup>95</sup> Biologically identical to conventionally produced meat, this innovative creation represents a monumental shift towards sustainability and compassion. While it awaits commercial availability in the United States, **Singapore has taken the lead by authorising the sale of lab-grown meat country-wide**.

## Biotech Breakthrough

**Oxford University** scientists have achieved the extraordinary: an **enzyme that converts air into clean, renewable electricity**.<sup>96</sup> Through a pioneering biotech process, this enzyme, named **Huc**, acts as a catalyst, initiating a remarkable chemical reaction that **transforms air molecules into usable electrical energy**. It harnesses the power hidden within the air we breathe, unlocking a new era of energy generation. By tapping into this innovative tech, **could this be the end of fossil fuel dependence?**

## INGREDIENT SPOTLIGHT

### BOOST COLLAGEN PRODUCTION WITH **ALGAKTIV® COLLAGEN**

Introducing **ALGAKTIV® Collagen**: a sustainable microalgae biotech revolutionizing skincare. With its **2-in-1 firming complex**, it nourishes and restructures the skin matrix, while **vegan collagen amino acids** provide essential building blocks. Boosting native collagen production, it rejuvenates the skin's architecture, and **protects the barrier for lasting hydration**.

### SUSTAINABLE VERSATILITY WITH **A-LEEN® 5**

Discover the trusted power of **A-Leen 5®**, a proven **multi-functional biotech ingredient**. With its **sustainable and eco-responsible formulation**, derived from renewable vegetable by-products, this **Pentylene Glycol** offers superior performance and versatility. A-Leen 5® provides a pleasant skin feel, **long-lasting moisturization**, and broad-spectrum antimicrobial protection.

### ENHANCE FORMULATIONS WITH **TILAMAR® PDO WITH NØOVISTA™**

**TILAMAR® PDO with NØOVISTA™**: Your versatile biotech solution. This Propanediol acts as a preservative booster, humectant, sensory enhancer, solvent, and actives carrier, and is 100% bio-sourced, non-GMO, and microbiome-friendly. **Simplify formulations with this high-quality ingredient for exceptional performance and sustainability.**

## The Adina POV

**As barriers crumble**, biotech emerges as a potent force for eco-conscious solutions. **Regulatory approvals amplify its potential** to revolutionize industries, fostering awareness and acceptance. This will enable the use of **high-performance materials with minimal environmental impact**, even surpassing the cost-efficiency of traditional or synthetic feedstocks.

## BIG SCIENCE WHAT'S NEXT

### Biome Breakthroughs

In the quest for healthy, blemish-free skin, a ground-breaking and first-of-its-kind study, conducted by **Gobiotics®**, has **shed new light on the role of the skin microbiome in acne-prone individuals**. The study, which first compared the microbiota diversity of acne-prone skin to that of normal skin, **uncovered a significant correlation between microbial imbalance and the presence of acne-causing bacteria**, namely Cutibacterium acnes (C. acnes) and Staphylococcus epidermidis (S. epidermidis).

Fig.1 Acne-prone Skin Microbiome



Fig.2 Treated with Placebo

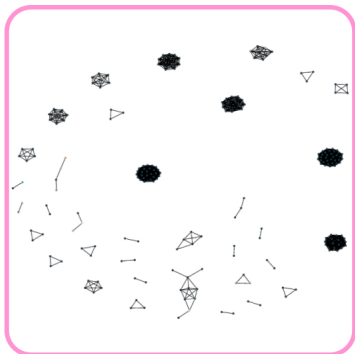


Fig.3 Treated with 2% preBIULIN FOS



Next, conducted through a **metagenomic approach**, the study embarked on an **in vivo forehead analysis using a leave-on treatment cream enriched with 2% preBIULIN FOS**, a prebiotic ingredient known for its potential to nourish beneficial microorganisms. A placebo cream with 0% Inulin served as the control (see Fig.2). **The results were nothing short of remarkable**. The study revealed that Inulin played a pivotal role in supporting communication within the skin microbiome. **With just 2% preBIULIN FOS, the number of connections within the microbiome exceeded triple that observed with the placebo cream** (see Fig.3).

The findings suggest that **Inulin acts as a key mediator in fostering a harmonious environment for beneficial skin bacteria**, which in turn helps combat the overgrowth of acne-causing bacteria. This revolutionary study unravels the intricate relationship between the skin microbiome and acne and **highlights the immense promise that Inulin holds as a potential solution for acne management and prevention in the future**.

## The Return of the Zombie...Cells

**Renewed interest in senescent cells**, also known as **"zombie cells,"** has sparked a revolution in the beauty industry's approach to combating ageing. Recent research has revealed that by depriving these cells of glucose, **intermittent fasting can effectively inhibit their secretion of harmful proteins and molecules**.<sup>89</sup> This finding has ignited a fresh wave of exploration in the beauty space.

Drawing inspiration from the potential of senescent cells, scientists and beauty experts are **delving into innovative strategies to address the ageing process at its core**. This growing fascination has prompted the development of specialised products and treatments designed to target senescent cells and mitigate their negative impact, **ultimately rejuvenating the skin**.<sup>100</sup>

Stay tuned for an upcoming breakthrough ingredient, set to launch later this year, specifically designed to target the core of anti-aging.

### INGREDIENT SPOTLIGHT

#### TARGET SENESENT CELLS WITH AC POMEASHIELD

This revolutionary new launch **harnesses the potent polyphenols of whole pomegranate**, acting as a protective shield against oxidative stress. By **targeting senescent cells**, it **rejuvenates your skin's natural regenerative abilities**, unveiling youthful radiance and combating visible signs of aging.

#### TRANSFORM THE MICROBIOME WITH PREBIULIN FOS

preBIULIN FOS is a natural prebiotic that **rebalances disturbances in the skin's microbiota**. Studies show that harmful microorganisms cannot metabolise preBIULIN FOS, therefore promoting a healthy microflora. In addition to providing daily skin control and barrier protection, this advanced prebiotic **has been proven to reduce C. acnes by 80% over 24hrs**.

# 4

## WORLD 2.0

Beauty looks different for each consumer and generation from all four corners of the Earth. While many are feeling the effects of the cost-of-living crisis, others are on the lookout for prestige and high-end products. In this section, we explore how brands adapt to the ever-changing landscape of the Beauty and Personal Care industry.





WORLD 2.0

# THE BEAUTY SQUEEZE

As the **cost-of-living crisis** continues to bite, consumers are switching up their shopping habits. While 87% of adults in the UK reported an increased cost of living from August to September 2022, **one in five under 35's admitted to 'downsizing' their lifestyle.**<sup>102</sup> The UK isn't the only country hard-hit by the crisis; eateries in Malaysia have started offering **'inflation rice' meals** to help those struggling with the rising cost of food.<sup>103</sup>

## Skinminimalism

The cost-of-living crisis has given **rise to stripped backed beauty regimens and curated beauty cabinets.** Now, more than ever, consumers are on the look-out for skinminimalistic products such as hard-working skincare essentials, **multi-use hybrids**, and hero ingredients.<sup>104</sup>

Built upon a **less-is-more ethos**, "skinminimalism" ditches harsh products aimed to "cover up" flaws for **well-formulated products** that truly benefit the skin. Whether that's through targeting multiple skin concerns or going back to basics, this trend is deep-rooted in **maximising the benefits of a single product** and lessening the chances of skin irritation.

**Uvina Skin** is a shining example of a beauty brand championing the less-is-more approach with their **Uvina Power Bundle.** Comprising a face bar, serum, and moisturiser, this Bundle is marketed as a fully comprehensive skincare routine that **harnesses the power of multi-tasking.**<sup>105</sup>



## Miracle Multi-taskers

'**Hustle**' by **D'you** is a hypertasker that doesn't only contain hero ingredients such as niacinamide, vitamin C, and hyaluronic acid but **boasts over 11 different actives.**<sup>106</sup> Dubbed the **one bottle solution for all your skincare woes**, it's a 360-degree treatment that claims to combat acne, dehydration, premature ageing, pigmentation, and wrinkles.

Another **miracle multi-tasker** is **Clinique's Even Better Clinical™ Serum Foundation.**<sup>107</sup> **Combining the skin-perfecting coverage of a foundation with the power of a serum and SPF protection**, this holy grail product improves dark spots and imperfections with Vitamin C, salicylic acid, and hyaluronic acid.

## Skinification

Going hand-in-hand with skinminimalism, **"skinification" sees the rise of multi-functional products in the UV and hair care space.**<sup>108</sup> One brand that's jumping on the trend is **JVN Hair** with its **Complete Pre-Wash Scalp Oil.**<sup>109</sup> Brimming with actives such as hemisqualane, bisabolol, and basil root extract, the best-selling oil works to nourish, hydrate, and cleanse the scalp. Meanwhile, **Coola** has released a cult **Dew Good Illuminating Serum Probiotic Sunscreen** with big beautifying benefits.<sup>110</sup>

## Bang For Your Buck

**CeraVe** is tapping into the bang for your buck movement on TikTok with the ever-popular **Daily Moisturising Lotion** that costs £16.50 for 473ml.<sup>111</sup> **La Roche Posay** is another brand that's gone viral with its multi-purpose cream, **Cicaplast Baume B5**, costing just £10 for 40ml.<sup>112</sup> While indie brand **Dieux** has released **Forever Eye-masks** that can be reused for over a year for only \$25!<sup>113</sup>



## INGREDIENT SPOTLIGHT

### FUTURE-PROOF YOUR SUN CARE WITH **PARSOL® DHHB**

Hop on the **skinification of sun care** trend with **Parsol® DHHB.** This eco-friendly and photostable UVA filter ensures optimal protection. Solubilized effortlessly, it **seamlessly blends with other organic and inorganic UV filters.** With its versatility, trust Parsol® DHHB to **enhance sunscreens and colour cosmetics**, making them irresistibly effective and environmentally conscious.

### FEED THE SCALP WITH **ALGAKTIV® BIOSKN**

Experience the power of **Algaktiv® BioSKN**, the **ultimate scalp superfood.** This **sustainable microalgae** active nourishes, soothes, and **rebalances both dry and oily scalps.** Boosting inner growth factors and **enhancing barrier health**, it revitalizes the scalp while reducing water loss. Discover **immediate nourishment and hydration**, and promote a **healthy scalp microbiome** with Algaktiv® BioSKN.

### \*NEW RINSE-OFF DATA\*

### **FABA TONIQ®**

Discover the ultimate curl enhancer, **Faba TONIQ®**, backed by **new rinse-off data!** This upcycled active **preserves natural and heat-styled curls for an incredible 48 hours**, defying humidity. Providing a soft yet effective hold with **added scalp care benefits**, **Faba TONIQ®, surpasses bestselling conditioners** in delivering exceptional curl hold.

## The Adina POV

Despite several customers opting for cheaper alternatives, there's been a **sales increase of 23% for prestige beauty** due to both investment and treat purchasing.<sup>114</sup> With a gap in the middle of the market, **consumers are opting to either trade-up or trade-down**, highlighting the need for brands to stay conscious of their position in the market.

## WORLD 2.0

# THE GLOBAL PERSPECTIVE

It's not all doom and gloom; while the beauty squeeze may be felt by some, the **Middle East and North Africa are anticipated to be the fastest growing region in beauty and personal care over the next five years.**<sup>115</sup> Total disposable income in these regions is set to almost double by 2040, driven by the rising cost of oil.<sup>116</sup> This is resulting in higher consumer focus towards lifestyle and luxury products.

## Beautyworld Middle East

The Middle East's largest international trade show for the beauty industry, **Beautyworld Middle East**, is seeing more and more international brands. This year, **Jo Malone will present a keynote speech** at the event. "There's a huge opportunity in the Middle East," said the Founder of the luxury perfume brand.<sup>117</sup>



## Sub-Saharan Boom

Sub-Saharan Africa is also seeing growth in the beauty sector. The rising middle class and amplified urbanisation means the **African cosmetics industry is predicted to grow by \$1.26 billion between 2021 and 2025.**<sup>118</sup>

**Fenty Beauty** is proof that the often overlooked African market is viable.<sup>119</sup> The cosmetics brand, launched by Rihanna in 2017, has **opened up in eight stores across the continent.** This means that consumers in Botswana, Ghana, Kenya, Namibia, Nigeria, South Africa, Zambia, and Zimbabwe can now purchase the range of inclusive beauty products. Available in dozens of shades, **customers no longer have to wait or pay more to get their product shipped from the US.**<sup>120</sup>

**Uncover Skincare** is another example of a brand expanding in the Sub-Saharan region. They took the East African market by storm with their **K-Beauty inspired viral sheet masks** made using African botanicals. "Our community has grown from zero to about 60,000 women in Kenya in two years," said the co-founder Sneha Mehta. Following its successful launch in East Africa, **the cult skincare brand has now launched in Nigeria.**<sup>121</sup>

## China's Beauty Evolution

As China **transitions from a zero COVID policy**, the personal care and beauty industry is **set to rebound.** The post-pandemic era is seeing a **surge in cosmeceutical products** targeting skin concerns such as "mask-ne" and breakouts from consumers staying at home in low-humidity environments.<sup>122</sup> While 2022 saw total cosmetic retail sales fall, this year revenue rose to **\$9.53 billion** in January and February alone.<sup>123</sup> Meanwhile, Euromonitor International predicts the **Chinese beauty market will grow by 5% in 2023.**<sup>124</sup>

China's market is evolving with **more demand for prestige and high-end brands**, driven by aspirational standards on social media. The likes of **Shiseido, Cle de Paeu, and Valmont** are proving popular as China's youth view skincare as an investment. Not only are top-of-the-line products on the rise, but the **male skincare market has seen a surge**, with sales up by 23.8% year-on-year since 2021.<sup>125</sup>



## WORLD 2.0 GEN Z-FLUENCE



Gen Z has brought a new look to the industry. This influential and dynamic demographic is redefining the sector by demanding **authentic, inclusive, experiential, purposeful, and affordable** beauty. In contrast to previous generations who use beauty for external validation, Gen Z sees beauty as a means to **self-expression and self care**.<sup>126</sup>

### Playful Beauty

From branding right through to formulation, Gen Z's want their products to be **experiential**.<sup>127</sup> **Vacation®** is a brand that's doing just that. Dubbed the world's best-smelling sunscreen, Vacation leans into Baywatch nostalgia with playful branding, a 90s throwback radio station<sup>128</sup>, and quirky products such as the **Classic Whip SPF 30 Sunscreen Mousse** housed in a whipped cream can.<sup>129</sup>

### Sensorial Appeal

**Florence By Mills** and **Off Limits Cereal** are two brands with sensorial appeal. While Mills' **Hit Reset Moisturising Mask** is encapsulated in fun-to-burst pearls,<sup>130</sup> Off Limits Cereal has created a bowl of **breakfast glitter** to add sparkle to your mornings.<sup>131</sup>

### Speaking their Language

Several brands are having fun with their branding whilst **meeting the demands of the social conscious Gen Z consumer**. After dominating the TV and film industry, **A24** partnered with **Euphoria's** make-up artist to launch **Half Magic Beauty** - a new beauty brand that champions self-expression.<sup>132</sup> **Glonuts**, on the other hand, is a vegan, keto, and clean mini donut brand that speaks to the demographic by adopting **neon colours and colloquial language**.<sup>133</sup>

### Rise of the Dupe

Gen Z's are **shedding the shame of the faux pas** felt by previous generations, as they proudly post **fake designer and beauty dupes** on their social media platforms.<sup>134</sup> An EU study revealed that **52% of 15-24 year olds bought at least one fake item online in the last 12 months**, with the majority of respondents citing the purchase to price difference.<sup>135</sup>

Gen Z's are taking to TikTok to compare affordable brands with luxury items using the 7 billion view-strong **#dhgate** hashtag. While **e.l.f Cosmetics' Halo Glow Liquid Filter Complexion Booster** has blown up on the platform for replicating Charlotte Tilbury Flawless Filter Foundation for half the price<sup>136</sup>, **Method's Vetiver and Amber Hand Soap** is said to smell exactly like Le Labo Santal 33.<sup>137</sup>



### INGREDIENT SPOTLIGHT

#### BOOST SENSORY APPEAL WITH A-SENSOFEEL MFC

Discover the power of **A-Sensofeel MFC**, a proven game-changer. Experience a **brighter, more intense colour payoff** that enhances the brilliance of your makeup formulations. With its rich texture and velvety touch, A-Sensofeel is the **new go-to to boost sensory appeal**.

#### ENHANCE PIGMENT INTENSITY WITH ALOE SURFACE TREATMENT

Introducing the **Aloe Surface Treatment**, a revolutionary **100% natural and hydrophobic solution**. Experience its lightweight, deeply moisturising formula, perfect for men's makeup and oily skin. With seamless compatibility and odourless composition, this remarkable treatment **effortlessly enhances pigment intensity while maintaining fluidity**.

### The Adina POV

Brands wanting to stay in the game must meet the demands of this demographic head-on. It's all about **promoting authentic beauty**, championing Corporate Social Responsibility, embracing accessibility, and, most importantly, **embracing the power of the dupe**. By considering **product performance, cost-per-usage, longevity, and shelf-life**, brands can create **affordable and inclusive options** and avoid the risk of being replaced.<sup>145</sup>



WORLD 2.0

# GET READY FOR GEN ALPHA



This year, the oldest of the youngest generation turned 13. With kids and pre-teens **taking to beauty a lot younger**, it's time to get ready for Gen Alpha. Like Gen-Zers and millennials before them, the younger demographic is already leaning towards a fresh set of values and aesthetics. While North West is a modern day vlog queen at the age of 10<sup>140</sup>, US Census reports **69% of under 18s use colour cosmetics**, and **68% have a skin care regimen**.<sup>141</sup>

## Digitally Native

Raised in the Digital Era, **Gen Alpha are digitally native**. This generation of influencers **view virtual and real experiences as interchangeable**. To pair real experiences with virtual reality, **immersive worlds of beauty must be created**. This means in-store retail should be experiential and go beyond online outlets. To lure Gen Alpha outside, brands should not only stay ahead of the latest trends but **embody diversity, fluidity, and equality** in everything they do.

Launched this year, **Clinique's** cutting-edge digital retail concept, **The Clinique Lab**, ensures relevance with the Gen Alpha crowd. With an **immersive virtual experience**, customers can create custom avatars and explore six unique environments, including product storytelling and gamification.<sup>142</sup> Globally accessible on desktop and mobile web, the brand aims to deliver **personalized skincare solutions while seamlessly integrating consumer experiences with accessible retail**.

## Distrust of the Traditional Influencer

Gen Alpha are questioning the credibility of influencers and, instead, **leveraging self-described AI beauty encyclopaedias** and seeking 'silent communities' of like-minded peers. With platforms like **Ask Mira** at their fingertips, this savvy generation of consumers are now utilising facial recognition to match their face shape, skin tone and type, and price range.<sup>143</sup>

## The Adina POV

Millennials epitomised perfectionism and minimalist branding, while Gen Z was antithesis to this with affordability, loud packaging, self expression, and social responsibility. But what does this mean for Gen Alpha? **Will they follow in the footsteps of their elders or, again, change direction, to more heritage brands with classic aesthetics?**

A stylized graphic of a tree on the left side of the image. The tree has a thick, light green trunk and two branches extending to the right. The background is a teal gradient, and the tree is set against a light green triangular shape.

# **Don't miss out on the latest ingredient launches & beauty trends**

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