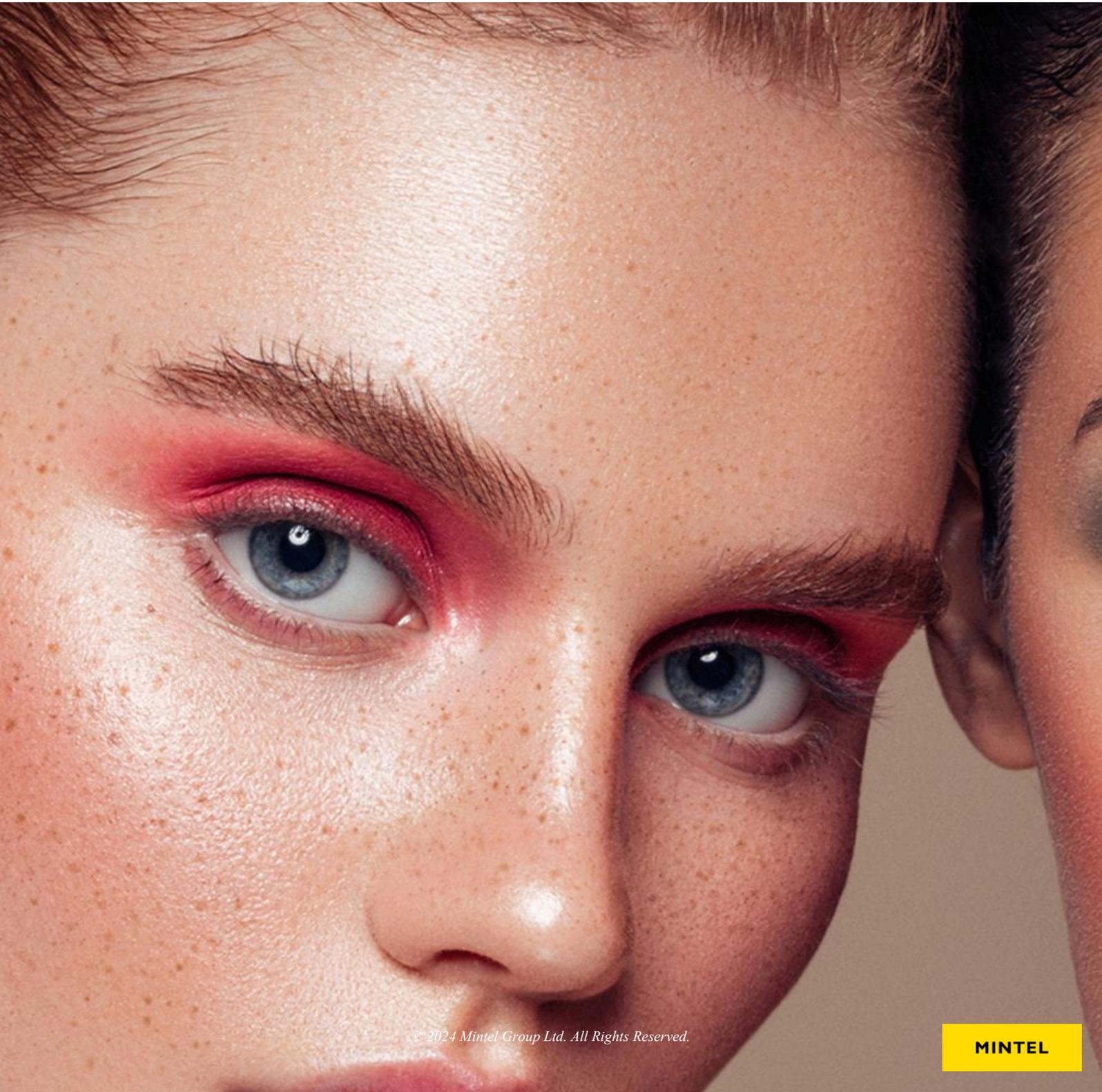


A YEAR OF INNOVATION IN COLOUR COSMETICS, 2021

Transfer-proof, hybrid skincare/makeup and playful/wellness-themed innovation emerged to help stem reduced engagement with makeup amid the pandemic.



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Report Content

- What we have seen
- Our pick of the most innovative launches in this review
- Innovation opportunities in cosmetics

EUROPE, MIDDLE EAST & AFRICA (EMEA)

- EMEA retail market overview: colour cosmetics, 2021

Europe: creative innovations emerge amid difficult COVID-19 times

- Innovations align with on-trend themes amid a pandemic
- 'Beneath-the-mask' innovations promote smudge-proof, oil-free and durable merits
- Durable and transfer-proof innovations stay put beneath masks
- Eye colour remains a small segment with growth potential
 - Graph 1: share of colour cosmetics launches by eye colour sub-categories, 2016 vs 2020
- Brands focus 'above the mask' and hone in on eyes
- Innovations harness the wellbeing merits of forests, scent and play
- Innovations harness the wellness merits of forests, scent and play
- 'Skinification' of makeup drives innovation
 - Graph 2: select colour cosmetics launches* by select skincare claims, 2016-20
- Primer innovation looks beyond providing an optimum makeup base
- Innovations call out skincare merits in product names
- Sanitising themes are niche but have made an appearance in cosmetics
- Continued focus on diversity, gender-inclusive and empowerment themes
- Innovations stress affordability as recession, linked to COVID-19, looms
- Despite challenges, new entrants see potential in cosmetics

Europe: the rise of eco/ethical/natural claims continues

- Vegan claims show fastest growth by far
 - Graph 3: cosmetics launches by select fast-growing natural, ethical and eco claims, 2016 vs 2020
- More innovations push organic, natural and vegan credentials
- More brands push organic, natural and vegan credentials
- Eco packs turn to glass, metal, plants and magnets and stress refillability

Middle East & Africa

- Standout launches blur with skincare and/or stress natural/'free from' formulas

ASIA PACIFIC (APAC)

- APAC retail market overview: colour cosmetics, 2021

APAC: creative innovations emerge amid the COVID-19 crisis

- NPD seeks to mitigate the impact of COVID-19-related challenges
- Playful packs and products tap into wellness trends
- Mask-friendly base makeup emerges: focus on durability and transfer-proof...
- ...and anti-acne/'maskne' formulas
- Foundation-free routines and products emerge
- Hybrid formulas blur with skincare
- Innovations focus on beautifying the eyes
- Peel-off nail tint taps into DIY trends
- Despite challenges, new entrants see potential in cosmetics markets

APAC: standout natural, 'free-from' and eco innovations remain limited

- Innovation in the natural, 'free-from' and eco space is limited or slow moving
 - Graph 4: colour cosmetics launches by select natural, free-from and eco claims, 2016 vs 2020
- Eco innovations focus on the packaging
- Clean beauty and natural innovations emerge

THE AMERICAS

- Americas retail market overview: colour cosmetics, 2021

Americas: innovations seek to stem reduced engagement during the pandemic

- Brands have worked hard to maintain makeup engagement amid COVID-19
- Eye makeup innovations take centre stage
- 'Beneath-the-mask' base/lip makeup stresses the durable and transfer- or smudge-proof
- Promote durability in engaging ways
- Hybrid all-in-one base makeup formulas offer durability and convenience
- Emphasise skincare merits
- Skincare claims in foundation/lip colour are largely unchanged
 - Graph 5: colour cosmetics (lip/foundation) with select claims, by region, 2016 vs 2020
- Innovative hybrid skincare/makeup formulas seen in North and Latin America
- Makeup brands see growth potential in skincare
- The spotlight on diversity (and inclusivity) continues to inspire innovation
- Playful, joyful and mood-boosting themes can help relieve stress and distract
- Wellness-focused innovations use an array of approaches

A year of innovation in colour cosmetics, 2021

- Despite COVID-19 challenges, new entrants see potential in cosmetics

Americas: natural and eco claims

- Sustainability and safety themes remain important
- The rise of vegan and cruelty-free claims continues
 - Graph 6: fastest growing eco/ethical and natural claims, 2016 vs 2020
 - Graph 7: fastest growing eco/ethical, natural and free from claims
- A selection of standout natural, eco and ethical innovations

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