

# INGREDIENT TRENDS IN BEAUTY & PERSONAL CARE – US – 2023

Steady growth in ingredient interest and fluency bodes well for BPC while making ingredient narratives more competitive to speak to comfort, value, and efficacy.



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# Ingredient Trends In Beauty & Personal Care - US - 2023

## This report looks at the following areas:

- Impact of economic and climate-related factors on the BPC ingredient landscape
- Key challenges and opportunities in BPC that impact ingredient innovation and communication
- Consumer ingredient research, including information resources and research interests
- Consumer perceptions of select, trending and established natural and active ingredients
- Consumer expectations and challenges as they pertain to ingredient trends in BPC



Steady growth in ingredient interest and fluency bodes well for BPC while making ingredient narratives more competitive to speak to comfort, value, and efficacy.

## Overview

Over half of BPC consumers research ingredients all or most of the time, indicating a steady growth of engagement and fluency that bodes well for NPD. Clear communication of ingredients beyond the ingredient list meets bare minimum expectations, while excitement around particular ingredients that address diversifying concerns can generate trial and recommendation.

On the other hand, demand and supply of new products have inundated the market with an overwhelming amount of ingredients and ingredient claims. At the end of their ingredient research journey, consumers simply want to know whether they will get the results they paid for. In a category where value and outcome take priority, investment in bio-engineered,

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climate-resilient formulations faces an uphill battle. But as evidence continues to prove out their long term cost-savings and efficacy, sustainable ingredient claims are expected to become a point of distinction that further bolster tried-and-true ingredients.

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# Report Content

### Key issues covered in this Report

- Overview

## EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- You saw it here first...
- Opportunities

## THE MARKET

### Market context

### Market drivers

- Higher engagement with ingredient research is a double-edged sword
  - Graph 1: level of ingredient research, 2022 vs 2023
- Future-proof formulas for supply chain resiliency
- Green chemistry will take sustainability to the next level

## COMPETITIVE STRATEGIES

### Ingredient communication opportunities

- Translate facial skincare ingredients to total personal care
- Re-invent tried-and-true favorites
- Reformulate for relevancy and customer loyalty
- Provide emotive solutions and mental health benefits through neurocosmetics
- Life-stage-focused care continues to boost ingredient relevancy and use-cases...
- ...while skin conditions are the next phase of customized care

### Spotlights on ingredients and ingredient claims

- Advance hydration to provide novelty
- Focus on formulation to stay ahead of the sustainability curve
- Sensitized skin to drive greater selectivity

## CONSUMER INSIGHTS

### Consumer fast facts

#### Research motivations

- Knowing better is feeling better
- Ingredient information must appeal to consumers' core desire for peace-of-mind
  - Graph 2: research motivations, by age, 2023
- Call out specific concerns for the appearance and health-motivated
  - Graph 3: select motivations for research, by gender, 2023
- Younger consumers necessitate ethical and sustainable ingredients
  - Graph 4: Eco- and ethical research motivations, by age

#### Information resources

- Resources have broadened toward digital channels
- Resources have broadened toward digital channels
  - Graph 5: information resources, 2022 vs 2023, any rank
- Growth in digital resources is driven by heavy researchers
  - Graph 6: select resources, any rank, by research level, 2023
- Don't take skintellectuals' enthusiasm for granted
- Target packaging and brand websites for light researchers
  - Graph 7: most commonly-used resources among light researchers, ranked, 2023

#### Research interests

- Main ingredients are the focal point of attention
- Main ingredients are the focal point of attention
  - Graph 8: factors of interest, ranked, 2023
- Outcome still matters, despite growing attention towards ingredient stories
- Provide dosage, patent technology, and ingredient origins to add value to heavier researchers
  - Graph 9: select research factors, by research levels, 2023
- Highlight dosage, delivery, and origin to drive interest among ingredient enthusiasts

#### Active ingredient perceptions

- Reinvigorate excitement towards power-playing actives
  - Graph 10: consumers who look for select active ingredients in their products, 2022 vs 2023
  - Graph 11: perceptions of efficacy among select actives, 2022 vs 2023
- Build on interest in more-niche actives by connecting to mature audiences
  - Graph 12: perceptions of efficacy of select actives among women, by age, 2023
- Leverage brand legacy for new ingredient education

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- Empower men with ingredient fluency, on their terms and interest
  - Graph 13: preference for select actives, by gender, 2023

## Natural ingredient perceptions

- Natural reigns in perception over synthetic
- Natural remains well-associated with safety and efficacy
  - Graph 14: perceptions of select natural ingredients, 2023
- Last year's trending naturals lose steam...
  - Graph 15: preference for select naturals, 2022 vs 2023
- ...while botanical alternatives capture consumer interest
  - Graph 16: perceptions of botanical alternatives, 2023
- Adaptogens are poised for a revival with the rise of mind-body personal care
- Prepare consumers for a future of responsible BPC
  - Graph 17: perceptions of select natural ingredients, 2023

## Challenges to ingredient trends

- The benefits of lab-grown are still little-known
  - Graph 18: perceptions of lab-grown natural ingredients, 2023
- Take inspiration from STEM content creators
- Safety remains a concern among consumers of color
  - Graph 19: attitudes toward natural vs synthetic, by race, 2023
- Access to clear, reliable information is improving
  - Graph 20: select attitudes toward BPC ingredients and ingredient research, 2023
- Anticipate "fast beauty" and duping, not just from ingredient enthusiasts
  - Graph 21: trend-seeking behaviors and attitudes, by research level, 2023
- Emphasize quality, process, and sustainability to defend against dupe culture

## APPENDIX

- Consumer research methodology
- Generations
- Abbreviations and terms
- Modernization of Cosmetics Regulation Act of 2022

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