

# Ingredient Trends in Beauty and Personal Care - US - 2022

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## This report looks at the following areas:

- The impact of COVID-19 and inflation on consumer behavior and ingredient trends in beauty and personal care
- How brands in the space are innovating offerings to stand out from the competition
- Resources consumers use to learn about the ingredients used in their BPC products
- Consumers' perceptions toward active ingredients and natural ingredients

Even among desires for natural ingredients and eco-friendly innovations, efficacy remains a top priority for consumers with over half of BPC researchers doing so to better understand the effectiveness of the products. Even more so, 38% of BPC users say they care more about the effectiveness of a product than the ingredients it uses, showing the importance of efficacious formulations in influencing purchase.

40% of BPC users say they are concerned that certain ingredients could lead to health risks, and skepticism toward ingredients and claims remains high in the BPC and wellness market, showcasing the importance for brands to address safety concerns as it relates to the ingredients used.

42% of BPC users say brands need to do a better job at explaining what ingredients they use and why, highlighting an opportunity for brands to be a source of truth for consumers, adding value beyond just products.

Due to instability of markets and a cost of living crisis, higher-priced ingredients and packaging components coupled with long lead times have created challenges for manufacturing partners, prompting brands to think differently about their ingredients and their strategies. As such, some brands are passing costs on to the consumer, prompting potential trade-down behavior, especially among lower-income households looking to protect their wallets.



"With a majority of BPC users researching ingredients, safety, health and most importantly, efficacy remain at the forefront of consumers' minds. Additionally, consumer awareness of active and natural ingredients bodes well for the category, and brands must go the extra mile to validate the effectiveness of its formulations."

– **Carson Wagner, Senior Beauty & Personal Care Analyst**

## Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### OVERVIEW

- **What you need to know**
- **This Report looks at the following areas**
- **Definition**
- **Market context**

### EXECUTIVE SUMMARY

- **Top takeaways**
- **Category Outlook**  
Figure 1: Category outlook, 2022-27
- **Opportunities and challenges**
- **Be a brand consumers look to for ingredient validation and education**  
Figure 2: Select attitudes and behaviors toward ingredients, by age, 2022
- **Ingredients are a pillar of the conscious beauty movement**  
Figure 3: Select reasons for researching ingredients, 2022
- **Established ingredient spaces still have room to grow**  
Figure 4: Select perceptions of select natural ingredients, 2021-22
- **Cost increases may temper the interest in ingredient innovations in the short term**
- **Key consumer insights**

### INGREDIENT RESEARCH SEGMENTS

- **While the amount differs, most consumers do ingredient research**  
Figure 5: BPC ingredient research, 2022

### MARKET FACTORS

- **Cost increases and supply chain issues may continue to impact BPC formulations**
- **Ingredient skepticism brought on by global regulations, recalls and lawsuits**

### COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

- **Ingredients spaces to watch**
- **Power actives spotlight: hyaluronic acid, vitamin C and retinol evolve**

Figure 6: Tata Harper's Hyaluronic Acid Complex

Figure 7: Shiseido Bio Performance Skin Filler, Japan, 2022

Figure 8: The INKEY List Tranexamic Acid Serum

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 9: OLEHENRIKSEN upgrades its vitamin C eye cream

Figure 10: Retinol ingredients within bodycare

Figure 11: Products with retinol alternative ingredients

- **Stressed skin support through anti-inflammatory ingredients**

- **Adaptogens will gain more awareness**

Figure 12: Dove's guide to de-stressing your senses

- **pH neutral skincare gains steam**

Figure 13: BPC products with claims matching pH neutral, US, 2017-21

Figure 14: pH-Neutral products

Figure 15: Nutrafol's Growth Activator hair serum with ashwagandha exosomes

- **Health-adjacent inspiration continues**

Figure 17: JS Health Vitamins Skincare with JSH-V7 Complex

Figure 18: Ferver Fermented Skincare

- **Help haircare routines through scalp, hair-thinning and gray hair supportive ingredients**

Figure 19: Ryo Double Effector Black shampoo and treatment

Figure 20: Virtue Flourish Thickening & Hydrating Mask for Thinning Hair

Figure 21: Boscia Probiotic Exfoliating Powder Face + Scalp

Figure 22: Divi scalp serum hero ingredients

- **Evolution of Sustainable Ingredients**

Figure 23: Products with plant stem cells

Figure 24: Rees: Products hand soap, Japan

Figure 25: Nivea Hibiscus & Honeysuckle Scent Caring Hand Soap Ecorefill Tabs

Figure 26: Plus Body Wash

- **TikTok serves as an information hub for younger consumers**

- **Dupe culture: ingredient edition**

Figure 27: Ingredient/product "dupes" on TikTok, 2022

## THE BPC INGREDIENT CONSUMER – FAST FACTS

### RESOURCES FOR LEARNING ABOUT INGREDIENTS

- **Product packaging is the go-to for ingredient research**

Figure 28: Resources for learning about BPC ingredients – Ranked (up to three), 2022

Figure 29: The Ordinary's relaunch with new name: Multi-peptide + HA Serum, 2022

- **Younger consumers rely on social media and online reviews**

Figure 30: Resources for learning about BPC ingredients – Ranked (up to three), age 18-24, 2022

Figure 31: Kendra the Mom's TikTok video, 2022

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Friends and family are go-to resources for “rare” researchers**

Figure 32: Resources for learning about ingredients, by BPC users who research ingredients “rarely,” 2022

## REASONS FOR RESEARCHING INGREDIENTS

- **Efficacy drives research no matter the age and gender**

Figure 33: Select reasons for researching ingredients, by gender and age, 2022

- **Parents hyper-focused on ingredients for household**

Figure 34: Select reasons for researching ingredients, by parental status, 2022

- **Heavy researchers are looking for active ingredients**

Figure 35: Select reasons for researching ingredients, by level of research, 2022

- **Be a source of truth for consumers**

Figure 36: Select reasons for researching ingredients, by generation, 2022

Figure 37: Sephora Canada’s TikTok Video on ingredient combinations, 2022

## ATTITUDES AND BEHAVIORS TOWARD INGREDIENTS

- **“Cleanical” to become the future**

Figure 38: Select attitudes and behaviors toward BPC ingredients, 2022

Figure 39: Eighth Day Skincare’s bioidentical ingredients

- **Include men in the clean beauty conversation**

Figure 40: Select attitudes and behaviors toward BPC ingredients, by gender, 2022

- **Guide young men through education**

Figure 41: Select attitudes and behaviors toward BPC ingredients, by gender and generation, 2022

## ACTIVE INGREDIENT PERCEPTIONS

- **While efficacy is top-of-mind, safety can influence consumers further**

Figure 42: Active ingredient perception, 2022

Figure 43: Dove’s Body Love Shower Collection, 2022

- **Promote gentleness for skin**

Figure 44: Select active ingredient perceptions, by age, 2022

- **Trending: Skin Cycling**

Figure 45: Skin Cycling with Dr Whitney Bowe, 2022

- **Bring men up to speed with well-known actives**

Figure 46: Active ingredient perceptions, 2022

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## NATURAL INGREDIENT PERCEPTIONS

- **Natural ingredients will play a singular role in the future of “conscious” beauty**

Figure 47: Natural ingredient perceptions, 2022

Figure 48: Conscious Beauty standards at Ulta

- **Top sought ingredients get a boost in 2022**

Figure 49: Select perceptions of select natural ingredients, 2021-22

Figure 50: Alo Yoga’s Clean Glow body system, 2022

- **Include known ingredients in Black hairstyling products**

Figure 51: Select perceptions of select natural ingredients, by race and Hispanic origin, 2022

Figure 52: Carol’s Daughter “Curl Hub”

## SHOPPING BEHAVIORS

- **Use ingredient stories to speak to consumer skin and hair concerns**

Figure 53: Shopping behaviors, 2022

- **Visual “proof” important for younger consumers**

Figure 54: Select shopping behaviors, by generation, 2022

Figure 55: Topicals before-and-after progress report and key ingredients, 2022

- **Make the connection between claims and ingredients seamless**

Figure 56: Select shopping behaviors, by gender and parental status, 2022

Figure 57: Drybar’s Agua Fresca hair collection, 2022

## FRUSTRATIONS WITH BPC INGREDIENTS

- **Be a brand that leads with education**

Figure 58: Frustrations with BPC ingredients, 2022

- **Lead with transparency about ingredient lists**

Figure 59: Select frustrations with BPC ingredients, by age, 2022

Figure 60: Credo Beauty’s Full Ingredient lists

- **Temper health concerns by adhering to global regulations**

Figure 61: Select frustrations with BPC ingredients, by race and Hispanic origin, 2022

## APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Consumer survey data**
- **Abbreviations and terms**
- **Abbreviations**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

# Ingredient Trends in Beauty and Personal Care - US - 2022



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Terms**

## What's included

Executive Summary

---

Full Report PDF

---

Infographic Overview

---

Powerpoint Presentation

---

Interactive Databook

---

Previous editions

---

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

---

EMEA +44 (0) 20 7606 4533

---

Brazil 0800 095 9094

---

Americas +1 (312) 943 5250

---

China +86 (21) 6032 7300

---

APAC +61 (0) 2 8284 8100

---



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.