



TRENDS

Indie Beauty Snapshot: 12 Emerging Trends Of Early 2021

MARCH 11, 2021



wouldn't let up. The Jan. 6 insurrection at the Capitol and fears over the transfer of power in the White House gripped a nation desperately seeking relief from crisis after crisis. Since President Joseph Biden took office, the chaos has calmed somewhat. Coronavirus vaccines are rolling out, and the federal government is actually getting stuff done, at least for the moment. Here and abroad, humans are nowhere near out of the pandemic woods, but we're getting closer to seeing an opening in the dense, disastrous trees.

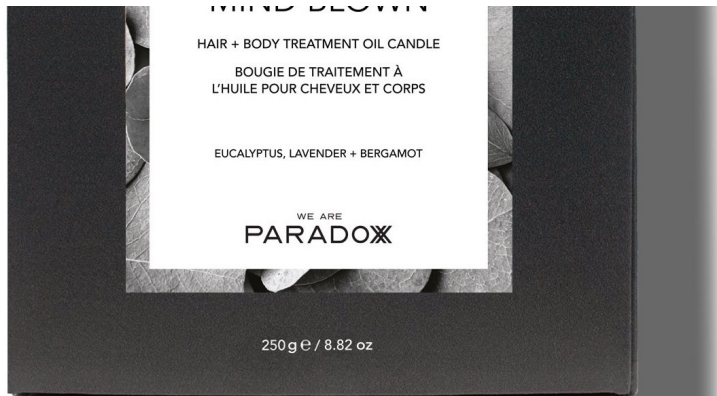
It seems like a modicum of optimism about the state of society may be breaking through the doom. For many products businesses, the overwhelming uncertainty of 2020 has mostly given way to the humdrum of the more typical obstacles of financial, time and workforce constraints. In the indie beauty space, the optimism is apparent in brands that, after a period characterized by a focus on survival and supply chain matters, are being proactive on product development, diversity initiatives, sustainability objectives and ingredient innovation. Below, we identify a dozen trends that suggest the beauty industry is ready to move forward into a brighter, interesting future.

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Makeup-skincare hybrids have been a thing. Now, haircare-skincare-body care hybrids are becoming a thing, too. A prime example is We Are Paradoxx's Mind Blown hair and body treatment oil candle.

1. HAIRCARE HYBRIDS

For years, the skinification of haircare trend has brought skincare benefits and ingredients to haircare brands. Now, haircare brands are extending out from the haircare category with products that cross haircare, skincare, body care and fragrance. They're the ultimate multitaskers.

We Are Paradoxx is pushing the needle on product versatility. The eco-friendly haircare brand's Mind Blown candle doubles as a hair and body treatment oil with shea and cocoa butter to condition skin and hair, and its exfoliating product Crushing It is both a scalp scrub and a body scrub. It's not the only brand with a strength in haircare that has multi-hyphenate wonders in its stable. Briogeo's B. Well Organic + Cold-Pressed 100% Castor Oil, and



whilst it works on your hair.



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As shopping shifted to e-commerce during the pandemic, Etsy's sales surged. Beauty brands have benefitted from the surge, particularly Little Herbs Co., which has become a favorite of celebrities as well as everyday shoppers on Etsy. The brand's Rose Gold Oil has been used by actress Gabrielle Union and rapper Cardi B.

2. THE ETSY BRAND EXPLOSION

At the outset of the last decade, Etsy was an early indicator of the clean beauty boom that was to come. Brands such as French Girl Organics and Herbivore flourished there before becoming mainstays of the clean beauty segment elsewhere. During the pandemic, Etsy has had a rebirth. Last year, the online marketplace divulges it acquired 61 million new and reactivated buyers. Its gross merchandise sales soared 118% to reach a record \$10.3 billion. Judging by visits, Etsy reports it's the fourth largest e-commerce website in the U.S.

As vaccinations stem the spread of the coronavirus, it's unclear if Etsy's unparalleled performance will be repeated. However, the brands that have thrived on the platform during



With people searching for healing remedies amid the pandemic, herbal beauty products have been a big theme on Etsy. Among the brands in addition to Little Herbs Co. in that arena on the site are Touch of Herbs, Hanna Herbals and April & Raine Herbal Solutions. Other beauty brands that have gained from the Etsy wave are Parlo Cosmetics, Shine Skincare Co., Fro.ology, Kitty's Apothecary, NaturelleGrow, Nectar Fresh Body and Lis Noir Skincare, which sells an organic cream deodorant that has garnered more than 3,730 reviews on the site with an average of five stars.

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Affectionately called T-Rex by The Inkey List's fans, the brand's Tranexamic Acid Night Treatment is one a number of products cropping up that contain tranexamic acid. The ingredient is particularly helpful to address hyperpigmentation and scarring.



Mark Curry, co-founder of The Inkey List, explains tranexamic acid has traditionally been used as a drug to address heavy menstruation, stop bleeding during surgical procedures and tackle melasma orally. Starting in 2014, Curry says studies have been conducted that demonstrate its positive impacts on scarring and hyperpigmentation. “Unlike traditional exfoliating acids, tranexamic acid specifically works to block the hormones that trigger skin pigmentation and regulate the production of melanin,” he elaborates. “Therefore, it is an ideal active to target hyperpigmentation, brighten dark spots and even skin tone.”

While its purposes have been ideal, its cost in the past hasn't been. Curry points out The Inkey List's tranexamic acid feat was unleashing the ingredient into the market in a product that's \$14.99. He wouldn't be surprised if more brands try to get in on the tranexamic acid action. “This ingredient has true transformational results when it comes to hyperpigmentation and scarring, and can be layered well with well-known super-actives such as vitamin C, niacinamide and even exfoliating acids such as glycolic acid and salicylic acid,” says Curry. “It is definitely one to watch in the skincare space.”

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After launching last year, Clubhouse has hit a fever pitch in 2021. In February, the audio app had 8.1 million registered users, up from 600,000 in December. As members of the beauty industry flocked to it, conversations about the business of beauty got real, thanks to the informal nature of interactions on Clubhouse. “The real-time feature of Clubhouse makes this a level playing field right now,” says Natalie Cardona, a makeup artist and creator of The Beauty Lounge club on Clubhouse, which boasts 3,300 members. “Marginalized voices can be heard equally on the same platform as top executives. This is less about status and more about substance.”

On Sunday, a so-called room on Clubhouse discussed Asian cultural appropriation in connection with gua sha specialist Wildling. Wildling co-founder Gianna De La Torre joined the room and shared the brand’s point of view live. Beauty industry professionals active on the platform believe that interaction isn’t unique, and the fresh format can facilitate important conversations at scale.

“Clubhouse can absolutely be a vehicle for change,” says Cardona. “We are having provocative discussions on gatekeeping, racism, diversity and so much more. Myself alongside Michela Wariebi, Tomi Talabi and Jaleesa Jaikaran have led some of the most nuanced conversations, from the intersection of beauty and aging to preserving beauty rituals from the African diaspora.”

BeautyStat founder Ron Robinson, who’s been active on Clubhouse for two months, agrees that difficult, but powerful conversations are happening regularly on the app. He says, “It’s a new virtual event/conference platform. In many rooms, the conversation has gotten heated and intense. Moderators disagree with each other, audience members have gotten offended, some rooms have been called out for not including enough diversity.”



In August 2020, Forma Brands, which describes itself as an incubator, accelerator, and curator, acquired 3-year-old clean haircare brand Playa.

5. EARLY-STAGE ACQUISITIONS

In 2019, the beauty mergers and acquisitions market was punctuated by mega deals like Unilever’s \$1 billion takeover of Tatcha and Shiseido’s \$845 million deal to pick up Drunk Elephant. The frenzy cooled a tad in 2020, but there was still Puig’s headline-grabbing acquisition of Charlotte Tilbury for a reported \$1.5 billion. Recently, Estée Lauder agreed to purchase a majority stake in Deciem a transaction valuing The Ordinary parent company at \$2.2 billion.

For the most part, though, the deals have been of a more modest nature, often made by beauty and personal care’s new band of strategics, companies like Forma Brands, which describes itself as an incubator, accelerator and curator. In August last year, it acquired 3-year-



CBD company PureK Holdings acquired clean skincare specialist INO B.S. What's driving these early-stage beauty acquisitions?

“I actually think there are two things that are driving this,” says investor Tina Bou-Saba, founder of seed fund CXT Investments. “In some cases, I think these deals happen because the company hit a wall in terms of growth and weren’t able to raise more money. It’s not a distress sale, but it’s not a high multiple, like a huge home run.” She adds that investor dollars are being diverted to tech right now, making fundraising harder for personal care brands. “This is a softer landing than shutting down the business,” says Bou-Saba.

Bou-Saba continues that some of the other early deals happening are due to investors being more aggressive in scooping up desirable assets. She says, “There are fast-growing, really compelling brands, very strong digitally and are really resonating with a core customer group. We do see acquirers active earlier than they might have been in the past.”



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Fulvic acid is a key ingredient in I'm Outside's Forest Bathing In A Bottle mist. Expect to see more beauty and wellness brands adding this holistic health dynamo to their formulations in 2021.

6. FORMULAS FORTIFIED WITH FULVIC ACID

Phylia de M., a clean haircare brand gone too soon, touted the importance of scalp health years before “skincare for your scalp” became a trite tagline. One of Phylia de M.’s key ingredients was humic free fulvic acid, which Phylia founder Kazu Namise claimed “helps repair what your body already knew before we damaged it...basically producing your best hair.” Phylia de M. may be no more, but there are a number of current brands picking up the



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rounder and formulator of Osmosis Beauty. Osmosis includes fulvic acid in several of its offerings, including Sugar Detox, Digestive Relief and Hangover Elixir.

Popular hair health specialist Act+Acre singles out fulvic acid as the hero ingredient of its Dry Shampoo. One of holistic wellness company Cymbiotica's star ingredients is shilajit, a black, tar-like compound rich in minerals and especially fulvic acid, considered the source of shilajit's many benefits, from curing jet lag to assisting with joint health. A 111-gram jar of Cymbiotica's Shilajit Black Gold retails for \$333.

For a more accessible fulvic acid alternative, there's I'm Outside's Forest Bathing In A Bottle. It's priced at \$28 for a 4-oz. size. Co-founder Claire Adams included fulvic acid and microalgae in her brand's face and body mist formula for their abilities to maintain the balance of the body's microbiome.

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Cocokind is the first beauty brand to print Sustainability Facts on its boxes that specify its carbon emissions, use of ethical labor, packaging materials and more.

7. EVEN MORE RADICAL TRANSPARENCY



products, one product at a time. The Sustainability Facts, printed directly on the products packaging, are calculated via a third-party measurement of each product's life cycle, from pre-manufacturing through consumer use and end of life.

Codex Beauty Labs has also beefed up its labels. In January, the skincare range created by Silicon Valley entrepreneur Barbara Paldus added an Efficacy Panel to its products designed to explain the quantitative data behind product testing in an easy-to-read format. In the spirit of transparency, not only positive results are shown. Test results where no statistically meaningful result was achieved or where a result was only temporary will be shown as well provide an accurate snapshot of product performance.

“By publishing our data, we can establish a new reference point for both consumers and the beauty industry,” says Paldus. “Customers should expect every brand to justify its product claims with quantitative data in order to objectively compare product performance and price. [The Efficacy Panels] allow customers to make educated decisions based on proven product performance for their skincare routines, and well-informed value purchasing decisions based on facts rather than marketing jargon.”

As a part of its commitment to sustainability, waterless haircare line Susteau, which was previously named OWA Haircare, introduced custom-designed packaging that has been developed specifically for its powder formulas to deliver the product more effectively to the consumer with less waste. Bradt says she chose to use the highest percent of ocean-bound recycled plastic possible for Susteau's bottles. In addition to using post-consumer waste for its shipping boxes, Susteau is eliminating secondary packaging for the majority of its e-commerce business, further reducing packaging waste.

Bradt says that one bottle of Susteau's Hair Conditioner is the equivalent of four bottles of an 8-oz. liquid bottle, making it a more sustainable choice from a consumption perspective as well. “Susteau's approach to beauty encourages consumers to rethink what personal care looks like while challenging the industry to be more transparent. This is only the beginning,”



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The teeth whitening specialist Snow has entered the lip product category with two items: Rejuvenating Lip Treatment and The Lip Exfoliating Scrub. It's among a number of brands offering solutions to dry, chapped lips caused by constant mask wearing.

8. MASK MOUTH REMEDIES

With the majority of Americans regularly sporting masks, it's no surprise maskne has become a scourge beauty brands jumped on addressing. But it's not the lone issue that mask wearing has caused. There's mask mouth or constant dry, peeling, chapped lips that stem from long stretches of covering mouths with masks. Brands are starting to spin out solutions for the annoyance. And, while consumers shy away from lipsticks, they may be willing to plunk down for soothing lip treatments if they can make mask wearing more bearable.

New men's beauty brand Beau D. has launched with moisture-promoting Lip Salve as its single debut product. Founder Brandon Palas explains, "The release of the Beau D. Lip Salve is quite timely as it makes the mask-wearing experience a more pleasant one. Its robust flavor



Qür is another brand making moves in the mouth merchandise category. From K7 Design Group, also the parent company of Ultra Defense Sani + Smart, the brand has two lip varieties: 360, which features a slide mechanism in its circular packaging, and Clip Balm, which can be clipped onto a belt, purse, backpack or pants. “We were able to differentiate our collection by developing a lineup that offers a better user experience,” states Giselle Kaplan, head of Qür.

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Oualie Botanicals' Blue Marine Cleansing Balm contains baobab oil, which comes from the seeds of the baobab tree. The baobab tree is native to Africa and found in 31 out of the continent's 54 countries.



Farah Hussein launched Zeila last year with a single unique product, Deep Cleansing Powder. It contains the brand's hero ingredient, qasil, a ground-up leaf powder from a tree native to East Africa that has been used by Somali women for generations. Other key ingredients include aloe vera leaf juice and kaolin clay. "It's common for brands to showcase a new product with a rare ingredient, but rarely do they shine the spotlight on the history of the ingredient and the people who use it," Hussein previously told Beauty Independent. "Zeila is committed to highlighting ingredient's roots while also supporting the communities they come from with ethical and sustainable sourcing."

Oualie Botanicals also launched last year. The brand is inspired by traditional African and Caribbean beauty rituals. "Thousands of years of traditional therapeutic uses lie in the land of the Caribbean islands and Africa, contributing to the sense of skin health and wellbeing," enthuses founder and creative director Rowena March. "We utilize the properties of each raw material found on these lands to create innovative products. Each ingredient has the potential to protect and nourish our skin, helping to reduce the effects of free radicals cell degeneration."

March unveiled Oualie with one start product, Blue Marine Cleansing Balm, which contains indigenous ingredient baobab oil. The oil is packed with vitamins A, D and E, and is rich in antioxidants. "The tree itself is often found in drier climates," says March. "They store massive amounts of water in their stems to cope with seasonal droughts. The tree provides large pods that produces a dry fruit pulp that is highly nutritious and considered a super fruit. The trees grow for years and some of them grow so big that they become national landmarks."

Launching in April with two products, Desert Nectar Natural Radiance Face Oil and Oasis Rejuvenating Face Oil, is Nuura. One of the brand's key ingredients will be organic and sustainably-sourced date seed oil. Founder Naema Abdi was born in Somalia and wanted to honor her African roots with formulations that feature ingredients from her homeland and avoided floral essential oils like rose and lavender that made her sensitive skin reactive. "Some



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Fans of Mexican botanical bath and body brand Nopalera have been requesting it put the illustration on its product packaging on other products. So, shirts are on the way. Merch such as shirts, sweatshirts and tote bags can broaden a beauty brand's relationship with its loyal fans.



sweatshirts. Peculiar Roots features shirts with several sayings. One exclaims, “I rock my crown high & proud.” Another beseeches, “Normalize being loc’d.”

For beauty brands, merch can engender engagement in between major project launches, help generate excitement for a major product launch if tied to one, provide a vehicle for collaborations with other brands or charities, and turn customers into walking billboards. For the launch of Hero Cosmetics’ Clear Collective blemish prevention system, the brand created Clear Collective wines. On Twitter, co-founder Ju Rhyu shared they were such a hit that merch drops will be a key aspect of its strategy in the future.

At Nopalera, a strong brand identity tied to Mexican culture encapsulated in an illustration devised by graphic designer Abby Haddican of a woman surrounded by the sun’s rays with three nopales sprouting from her head has spurred customer requests for merch. The bath and body care brand has shirts on the way. “To build a brand is to build a universe. You are creating something people want to be a part of,” says founder Sandra Lilia Velasquez. “I don’t think adding merchandise will work for every brand, but, for me, it makes sense.”

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Skin Actives Scientific has purchased plastic credits from Plastic Collective, which runs community projects in Australia, Indonesia, Malaysia, East Timor, Cambodia and the Solomon Islands to turn plastic waste into plastic recycling, in order to go plastic neutral.

11. FOOTPRINT-FORWARD SUSTAINABILITY EFFORTS

It's not enough to be neutral anymore. Companies have been offsetting their carbon footprints to be carbon neutral for a while. Anyone who opens a Google page finds out the search giant has been doing it since 2007. Now, beauty brands are going beyond carbon neutrality to carbon negativity.



In the United Kingdom, Neighbourhood Botanicals reports it's the first beauty brand to cross into carbon negativity. The brand says it offsets more than double its emissions through a hydropower project in rural China. In the U.S., clean beauty retail concept The Detox Market has set a target to become carbon negative by 2025. It's partnered with Eden Reforestation Projects, a nonprofit that plants millions of trees, to realize its carbon-negative goal.

Beauty companies are thinking beyond compensating for their carbon footprint. They're taking a hard look at their plastic footprint as well. Skin Actives Scientific has partnered with Plastic Collective, which runs community projects in Australia, Indonesia, Malaysia, East Timor, Cambodia and the Solomon Islands to turn plastic waste into plastic recycling, to go plastic neutral.

“Even though I’m putting plastic into the environment, I’m funding taking out plastic from the environment and paying for good jobs in communities that really need them,” says Skin Actives Scientific CEO Jonatan Funtowicz. “I’m the person who signed up for the program the fastest.” Funtowicz, who’s become a consultant for Plastic Collective, estimates Skin Actives Scientific released 20,000 kilos of plastic into the environment last year, and he paid to offset 50,000 kilos with assistance from Plastic Collective. Rather than plastic neutrality or negativity, he mentions descriptors that are emerging around addressing plastic footprints are “zero leakage,” “100% recycled at end of life,” and “net circular.”

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In recent years, there's been an increase in the number of Latinx founders in the haircare and makeup segments. Now, brands owned by entrepreneurs of Latin and South American descent are swelling in the skincare segment. Among the brands are Vamigas, Joaquina Botánica, Brujita Skincare, SunKissOrganics and Tierra & Lava.

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12. THE RISE OF LATINA-OWNED SKINCARE BRANDS

After a bevy of Black-owned brands popped up in the makeup and haircare sectors, Black entrepreneurs filtered into skincare in recent years. Just a few of the brands they lead are Bolden, AbsoluteJOI, Rosen, Minimo Skin Essentials, Topicals and Epara. The same trajectory is happening with brands from Latina founders.

The haircare and makeup field drew a strong showing of Latina-owned brands such as Rizos Curls, Alamar Cosmetics, Reina Rebelde, Honey Baby Naturals, Vive Cosmetics, Glamlite and Bésame Cosmetics. Today, the crop of skincare brands helmed by founders of Latin and South American descent is blossoming. It includes Joaquina Botánica, Vamigas, Brujita Skincare, SunKissOrganics, Tierra & Lava and the aforementioned Nopalera, which skews to bath and body. These brands tend to spotlight ingredients from Latin and South America, and speak to the concerns of Latinx consumers, a burgeoning group in the U.S.



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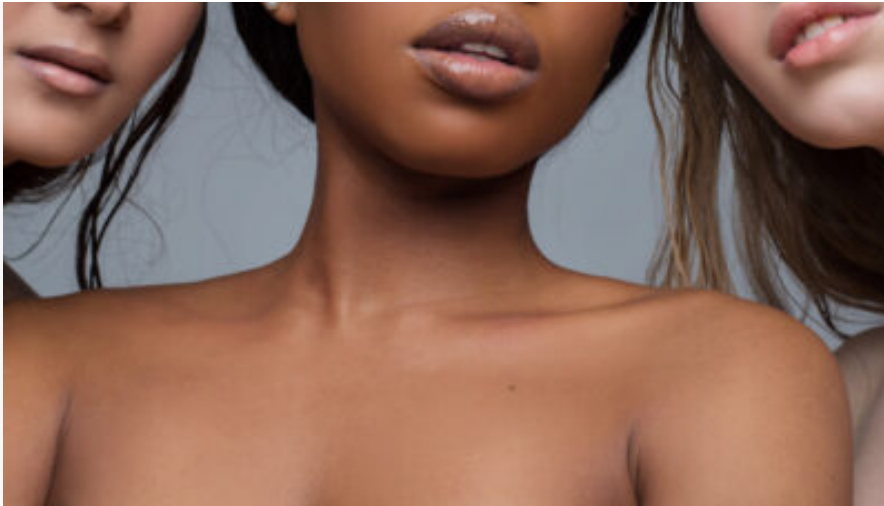
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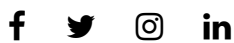
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