The influential wellbeing message of ‘probiotics’ for skincare

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Pairing of ‘probiotics’ with natural, healthy living

Growth of ‘probiotics’ in skincare

Healthy skin microbiome = healthy skin

Expanding ‘probiotics’ reach

Need for fun & experiential 101 classes on probiotics
Skin microbiome gains global appeal

Global: Skin microbiome* mentions skyrocket online

Source: Infegy/Mintel
56% of US consumers associate natural or organic attributes with the term "clean".

Clean simply means the ingredients do no harm – they can be natural, organic or synthetic.

Majority of US consumers place clean ingredients into the natural/organic group, and this link between clean and natural goes across generations:

- 55% for Baby Boomers, born between 1946 and 1964.

Base: 1,035 US internet users aged 18+ who purchase natural or organic personal care products
Source: Lightspeed/Mintel
More people adopting veganism for a healthier way of living. Retailers and brands take notice:

- Retailers promoting vegan brands have seen impressive sales growth. UK retailer Superdrug saw sales for its vegan B. line jump 750% in Veganuary (January 2019).
- Multinationals are quickly adding vegan ranges to portfolios (eg Clarins new vegan product line, My Clarins).

Source: cosmeticbusiness; veganfoodandliving

My Clarins: vegan and cruelty-free skincare line
Cruelty-free claim is becoming a requirement for facial care brands in Western markets

Estimated top 10 retail value markets (2019): % animal-ethical claim for new face/neck care product launches*, May 2018-Apr 2019

- USA: 45%
- India: 42%
- UK: 42%
- Germany: 28%
- France: 25%
- Italy: 14%
- Russia: 13%
- Japan: 3%
- South Korea: 3%
- China: 2%

*Launch type matches one or more of (New Variety/Range Extension, New Product)
Source: Mintel Market Sizes; Mintel GNPD
Growth of ‘probiotics’ in skincare
Probiotics offer natural health & wellness remedies

US sales of probiotic expected to reach

$2.7 billion

in 2019 – an increase of 29% from 2017-2019*.

49% of US consumers take probiotics supplements for general wellbeing.

*Includes Natural & Specialty Retail, which represents natural, health food, supplement, and specialty retail outlets; Mass Market Retail, which represents grocery, drug, mass merchandise, club, and convenience stores; Direct Channels, which include mail order/DRTV/Direct Response Radio, network marketing, internet, and practitioners. Base: 2,000 internet users aged 18+

Source: Nutrition Business Journal; Lightspeed/Mintel
Younger US women more inclined to trial probiotic and fermented skincare

% US females who are interested in trying skincare ingredients, by age group, September 2017

<table>
<thead>
<tr>
<th></th>
<th>Probiotics</th>
<th>Fermented ingredients*</th>
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<tbody>
<tr>
<td>18-34 yrs</td>
<td>45</td>
<td>24</td>
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<tr>
<td>35-54 yrs</td>
<td>41</td>
<td>14</td>
</tr>
<tr>
<td>55+ yrs</td>
<td>21</td>
<td>11</td>
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*For example, sake, kimchi, kombucha
Base: 975 US female internet users aged 18+ who bought skincare products

Lactobacillus: Common probiotic bacteria used in skincare

Source: Lightspeed/Mintel
Probiotics in skincare: what does it mean?

What ingredient does the probiotic label often refer to in skincare?
Microbe-derived fermentation products that include antioxidants, amino acids, peptides and lactic acid.

What is the most common probiotic used in skincare?
*Lactobacillus* (genus) – lactic acid bacteria

What skin benefits do probiotic ingredients offer?
Moisturizing, nourishing and skin protection

What are the top facial skin claims associated with probiotics?
Anti-ageing, Moisturizing/hydrating, Brightening
Healthy skin microbiome = healthy skin
Gallinée has been a leading voice in promoting the importance of maintaining a healthy skin microbiome that has helped spawn ingredient introductions from multiple suppliers and creative claim language by small and big brands alike.

**Region: % global new facial care launches with microbiome**

- Europe
- North America
- Asia Pacific

<table>
<thead>
<tr>
<th>Year</th>
<th>Europe</th>
<th>North America</th>
<th>Asia Pacific</th>
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<tbody>
<tr>
<td>2017</td>
<td>0.4</td>
<td>0.5</td>
<td>0.9</td>
</tr>
<tr>
<td>2018</td>
<td>0.5</td>
<td>0.9</td>
<td>1.3</td>
</tr>
<tr>
<td>Jan-May 2019</td>
<td>0.9</td>
<td>1.3</td>
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Source: Gallinée; Mintel GNPD

*Launch type matches one or more of (New Variety/Range Extension, New Product); product description matches microbiome
Maintain the good skin bacteria and help keep the bad away

**Aurafirm (Oat Cosmetics):** “*natural oat fermented actives*” produced from fermentation of proprietary colloidal oatmeal with a selective *Lactobacillus* strain. Claimed to restore a healthy skin microbiome and set up an environment for the skin microbiome to grow and thrive.

**Black BeeOme™ (Mibelle Biochemistry):** bacteria *Zymomonas mobilis* ferment extract made from black bee honey. Rare black bees are found in Swiss mountain valleys. Claimed to “*regenerate the skin microflora after washing*”; fortify and protect skin barrier as well as decrease sebum production.

**SymReboot™ L19 (Symrise):** mildly heat-treated probiotic that maintains organism structure. Claimed to stimulate natural defense systems to maintain a healthy, functional skin barrier.

Source: oatcosmetics; mibellebiochemistry; symrise
Expanding ‘probiotics’ reach
Growing consumer interest for beauty from within products

Growing appreciation by consumers for a **multi-prone health & wellness regimen** to feel and look good.

- 48% of US consumers who use facial skincare products have taken vitamins with beauty-enhancing benefits.
- 44% of Chinese women aged 25-29 who are health supplement buyers purchased products for beauty-enhancing reasons.

**Return a healthy skin appearance**

- Mix of soiled bacteria (*Bacillus*, 2) and live *Lactobacillus* (4) & *Bifidobacterium* strains (3) along with prebiotic Konjac root extract to get skin back to looking healthy.

**Wellbeing boost**

- Mix of fruit and vegetable juices with probiotics to maintain a healthy body balance.

Source: *humnutrition; Lightspeed/Mintel; KuRunData/Mintel*
A future role for skin microbiome and personalized skincare…

70% of UK women have an interest in personalizing beauty or grooming products; jumps to 89% for women 16-34.

Base: 1,008 female internet users aged 16+

‘Personalized’ microbiome products (eg Viome) that tag to the wellness movement are available, claiming to identify diet/foods that work best for each person to feel and look their best.

Microsoft Genomics partnering with Eagle Genomics has jumped in to build a robust AI microbiome platform.

Collection of skin microbiome data for different demographics (women (Givaudan) and old versus young adults (Amway/Microbiome Insights) has increased basic knowledge, and opened up new product possibilities.

Commercializing a skin microbiome personalized assistant to track skin changes and advise on products has many hurdles ahead, but will have a receptive audience waiting for it.

Source: viome; labiotech; happi; givaudan; Lightspeed/Mintel
Need for fun & experiential 101 classes on probiotics
Livening up skin microbiome conversations

The Secret Life of Skin (funded by DSM)
“We are serious about the science, but we like our substance with style”

Articles from an array of professions that touch on a variety of subjects that tie to the skin microbiome.

Instagram posts: thesecretlifeofskin adds catchy visuals to content

Unlocking the different skincare approaches from the microbiome

How to bring microbiome skincare to life

Source: thesecretlifeofskin
Create an interactive and fun set of experiences to educate while showcasing brand

**Educational**: skin-cancer and sunscreen “myth-busting” – Put an end to pseudoscience!

**Consultative**: one-to-one sessions on SPF with brand sales associates.

**Experiential**: consumer’s personal journey outlining sunscreen habits.

**Educational**: learn importance of brand’s hero ammonia-oxidizing bacteria in human health.

**Promotional**: how the brand rebalances 21st century human skin microbiome with old, but good healthy bacteria.

Source: glossy; prnewswire
Thank you!

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