

Skin & beauty

The nutricosmetics report

Explore the latest insights and
opportunities in nutribeauty



 Bioiberica

Foreword

The beauty market has a new look. No longer considered 'skin deep', 10-step topical routines just don't cut it for some consumers anymore.

As a growing number of individuals acknowledge the power of inner health on outer appearance, the focus is fast moving away from short-term fixes to long-term solutions. Beyond preventing wrinkles with creams alone, to supporting skin health from the 'inside out'.

Think more healthy ageing, less anti-ageing.

One thing is clear. The nutricosmetic movement is here, and it's set to become the norm for beauty regimes. **It's a new era in health where beauty meets nutrition.** A philosophy that's attracting growing interest. And creating big opportunities for brands across the cosmetic and food and nutrition industries.

Ready to revitalise your product portfolio and attract a new generation of consumer? This report illuminates the latest market insights and trends in the nutricosmetic space to inspire your next cutting-edge innovation.



A handwritten signature in black ink, appearing to read 'Antonio Vendrell'.

Antonio Vendrell

Marketing Director, Bioiberica



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Getting 'underneath the skin' of beauty nutrition

It's the beauty nutrition market's time to shine - but do you know everything there is to know about these nutrition-cosmetic fused solutions?

To help you understand what nutricosmetics are and how they influence our appearance from within, we've outlined some commonly asked questions in this booming space.

1 What is the role of nutrition in 'beauty'?

Beautiful skin, hair and nails start with nourishment from within. Nutritional status plays a significant role in the maintenance of skin health. And skin that functions properly has aesthetically pleasing properties, giving it a healthful appearance and feel. Multiple macronutrients (carbohydrates, proteins and lipids) and micronutrients (vitamins) all work together to maintain the health of skin.

2 What influences the health of skin?

Human skin is affected by environmental factors, including exposure to sunlight, extreme temperatures, tobacco and pollution; behaviours, like water intake, diet, sleep, exercise and stress; and endogenous factors such as ageing, hormones and genetics.



Getting 'underneath the skin' of beauty nutrition

3

What are nutricosmetic ingredients and products?

The best way to stay nourished is a healthy diet. However, the always-on' lifestyle and diet preferences that characterise modern life often don't allow the skin to get the essential nutrients it needs through food alone.

Nutricosmetics - also called 'beauty-from-within' or beauty supplements - are a category of edible beauty products that unite cosmetics and nutrition (Figure 1).

They can help improve the way we look - and therefore feel - from the inside-out by providing necessary nutrition to skin (as well as hair and nails). This makes them a powerful complementary step in beauty routines.

4

How do they differ from cosmetics?

Nutricosmetics primarily support the condition of the skin, hair and nails through oral supplementation of nutrients, unlike traditional cosmetics, which are applied topically. The key difference is that they promote a healthy appearance by supplying nourishment from within and have the potential to facilitate a much more holistic approach to beauty with wide-reaching benefits.

Meanwhile, topical products can only really impact the outermost layers of the skin's epidermis where they are applied and are thus limited in this respect.

5

What are some of the challenges linked to nutricosmetics today?

Beauty claims do not usually fall within current regulatory frameworks for food supplements, therefore a lack of clear information and products without science-backed health benefit claims - generating false expectations and ineffective solutions - have been a challenge in the market.

Consumer perspective and awareness have equally been a barrier. While nutraceuticals are well accepted amongst consumers, there is still some work to be done to help shift existing mindsets, so that nutricosmetic solutions are considered just as important as topical regimes. At the same time, although a growing number of consumers are aware of the longer-term benefits associated with supplementation, some are still highly focused on quick fixes. Education on nutricosmetic ingredients and their role is therefore key to overcoming this.

Figure 1.

Nutricosmetics: The intersect between nutrition and cosmetics.¹



Beauty from the inside out

The nutr cosmetic market is glowing. The 'beauty-from-within' concept has been around for several decades in the modern world – and has been influenced by ancient practices, like traditional Chinese medicine, for much longer. However, nutri beauty has only just become mainstream. In recent years, the market has witnessed rapid growth in developed and developing countries – especially Asia Pacific.



Market growth
9% CAGR 2021-2030.²



Sales
US\$ 7.34 billion in 2021;
15.82 billion by 2030.²



Skincare holds the major share
of the global market.²

Figure 2.
Global nutricosmetics market (2020) by product type.²

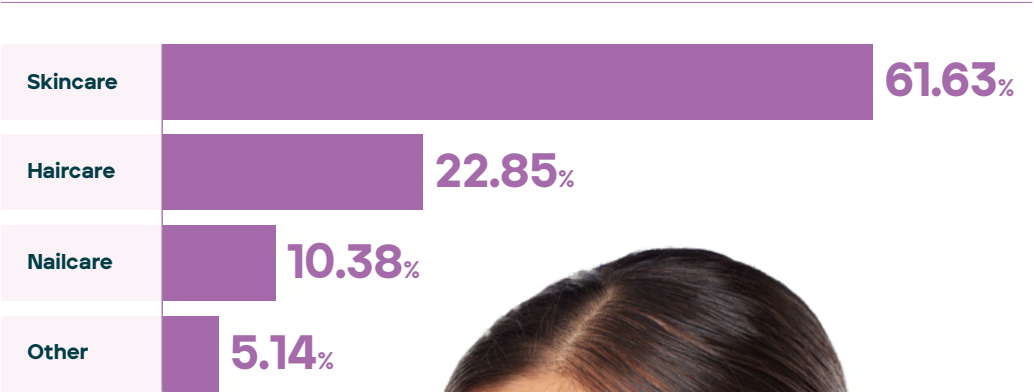
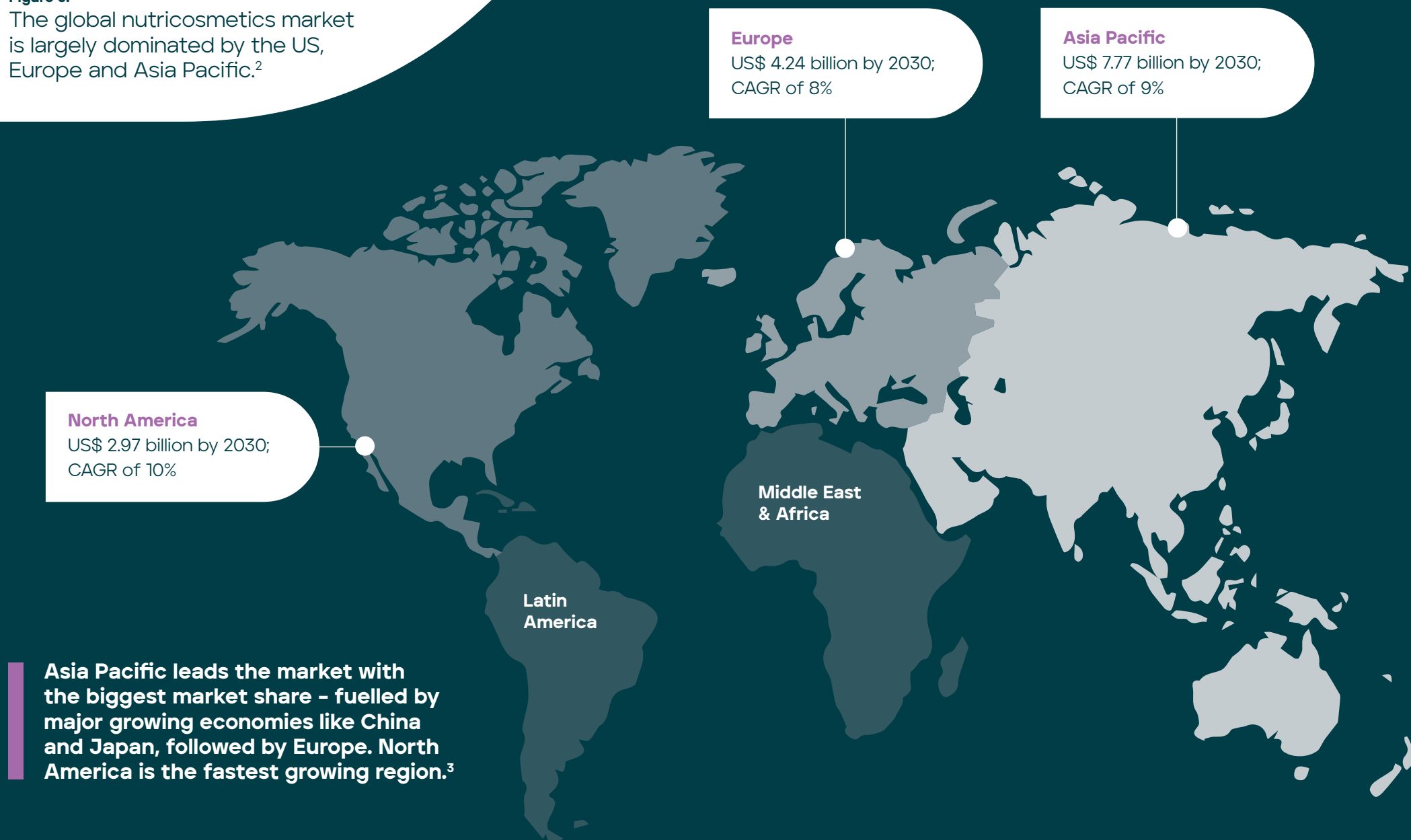


Figure 3.

The global nutricosmetics market is largely dominated by the US, Europe and Asia Pacific.²



Asia Pacific leads the market with the biggest market share – fuelled by major growing economies like China and Japan, followed by Europe. North America is the fastest growing region.³

4 trends shaping the global market

1

Health consciousness

Globally, there is rising interest in overall wellbeing and growing acceptance that beauty can be achieved internally through nutrition. Simultaneously, there's an emerging belief that looking good is equivalent to feeling good – many consumers today view skin as an external reflection of how they feel internally.

This concept is influencing consumers across the world to prioritise their health through nutritional support, and diets are changing as a result.

People are becoming extremely receptive to nutritional solutions – like ingestible beauty products – to help chase that 'feel good' feeling. Taking a more proactive approach to skin, hair and nail maintenance is also becoming more the norm.

66.0%

of consumers recognise the link between skin health and overall health and wellbeing.⁴

59.0%

want to improve skin health.⁴

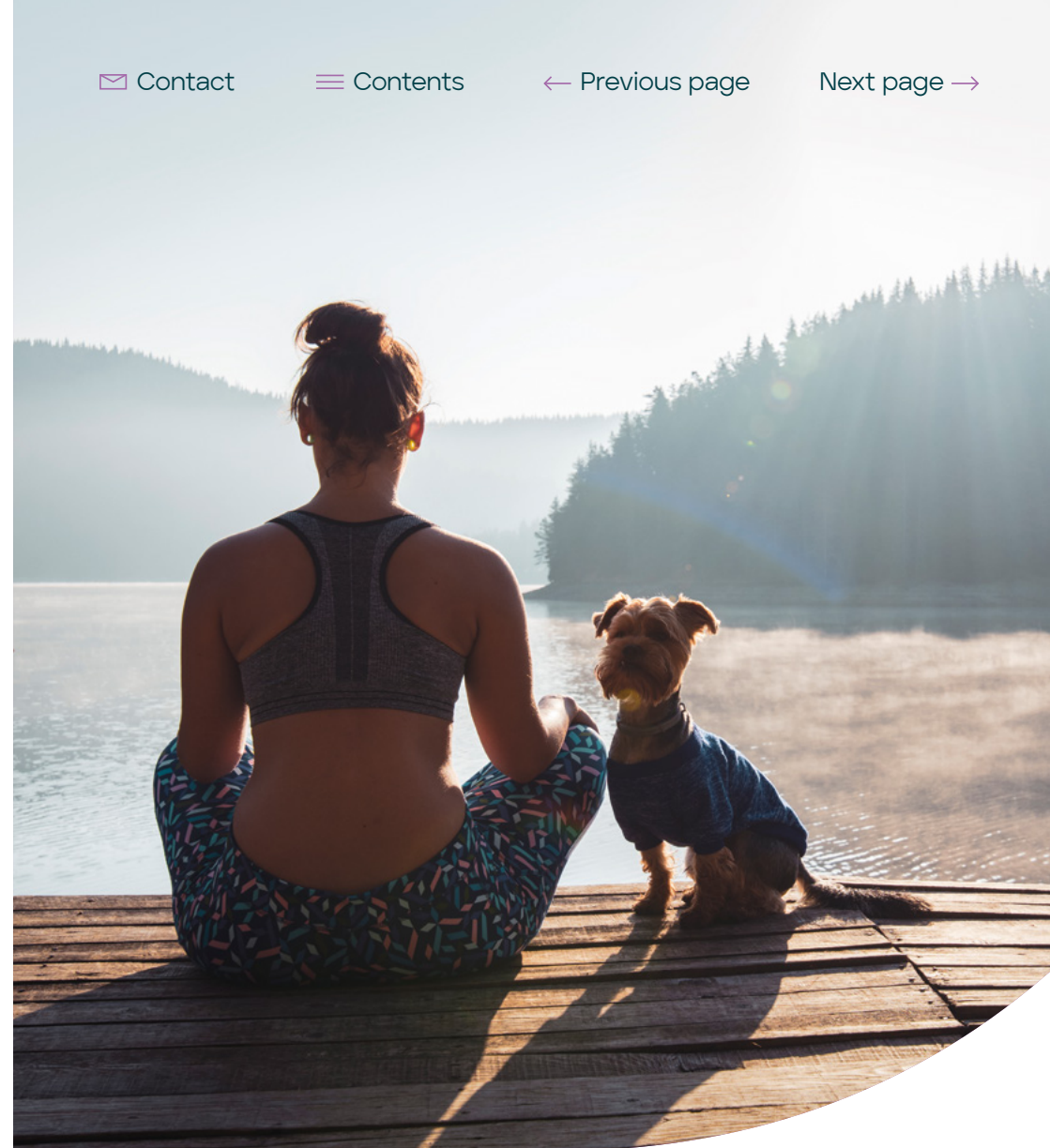
2

Holistic mindset

The health-conscious trend goes hand in hand with the emerging holistic beauty movement. Consumers today recognise that all aspects of health are intrinsically connected; that supporting health in one area can produce benefits in another. And because of this, many are adopting a more proactive and holistic approach to their long-term wellness.

In the beauty space specifically, this philosophy blurs the boundaries between traditional beauty products and wellbeing. **A growing population of consumers are linking healthy skin to other healthy habits, like exercise (30.0%), better sleep (41.0%), improved work-life balance (45.0%) and nutritional supplements (21.0%).⁴**

They are also progressively attracted to products that offer multifunctional benefits linked to skin health, and beyond.



4 trends shaping the global market

3

Healthy ageing and self-care

There is a growing emphasis on maintaining physical appearance as we age, but the focus is more on preserving natural beauty rather than enhancing it.

Global cosmetic usage has decreased by 31.0% compared to five years ago, as women choose simpler routines and a 'natural look'.⁵

To support natural ageing, consumers are also investing more time in self-care, and 'beauty-from-within' solutions are progressively viewed as part of this.



75.0%

consumers accept the diet's role in healthy ageing.

34.0%

of consumers 'strongly agree' that healthy ageing starts with what they eat and drink.

41.0%

of consumers 'agree' that healthy ageing starts with what they eat and drink.

4

Edible appeal

Initially, the recent COVID-19 lockdowns removed the expectation for consumers to keep up with their make-up routines and afforded them more time to focus on general skincare. However, with life back to 'normal' for most of the world, the aspects of skincare regimens that are likely to continue are those that can be easily incorporated into consumers' daily routines.

Using more than three topical products is increasingly viewed as inconvenient, while taking one pill with breakfast is perceived as easier.

This shift has inspired brands to explore new delivery formats, including innovative dietary supplements and functional foods.

78.0%

Increase in global food, beverage and supplement launches with functional beauty claims (January 2017 - December 2021).⁶



The modern nutricosmetic consumer

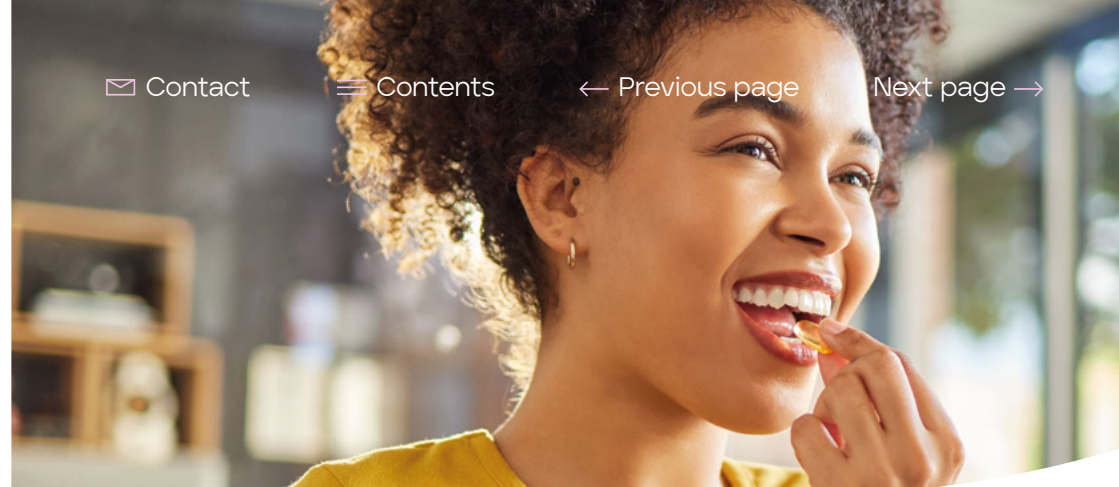
Traditionally, women have represented the conventional consumer in the beauty and emerging nutricosmetic markets.

Older women in particular are viewed as a key demographic – especially in markets that have an ageing population, such as Japan. However, younger age groups and men are entering the playing field too – and becoming increasingly interested in care products.⁷

Powered by the
'ageing well' trend,

72.0%

of women are now focused on looking healthy rather than young.⁸



But why are they interested in nutribeauty?

Edible beauty products bring perceived benefits, such as moisturisation, hydration, acne prevention, sun protection and reparative properties. The modern nutricosmetic buyer wants to improve their self-confidence in the short-term and facilitate healthy ageing longer-term.

The top reasons for purchasing a nutricosmetic product include:



Interestingly though, 58.0% are interested in skin health products, even though they don't suffer from specific problems – highlighting preventative attitudes.⁴

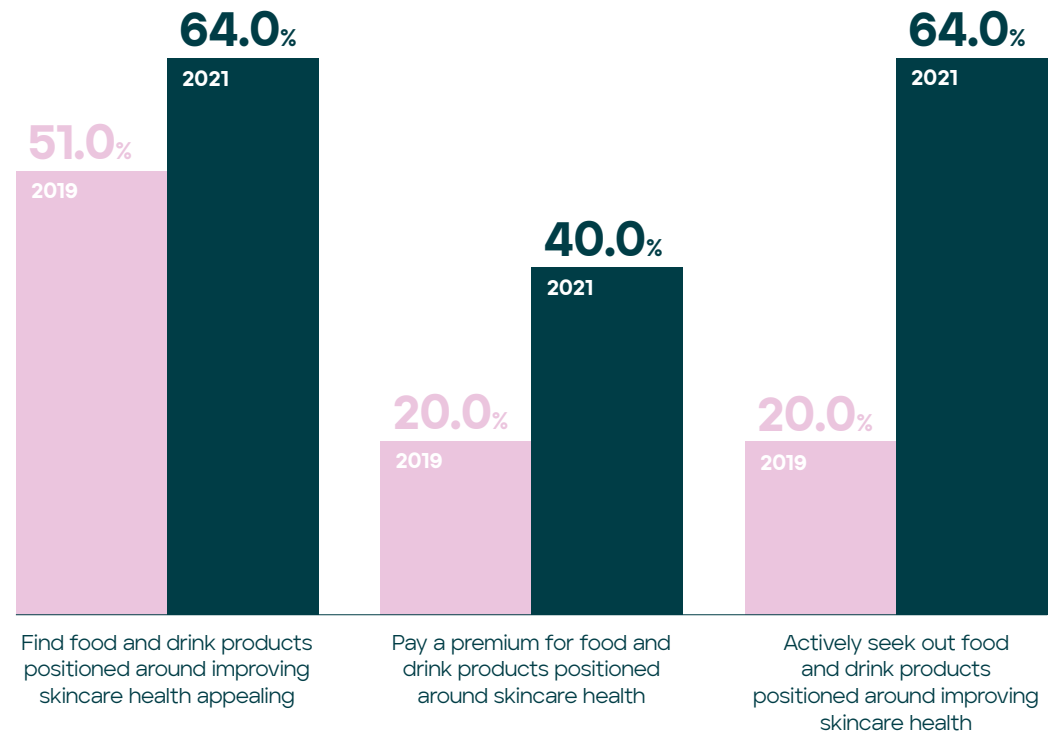
Format preferences

In terms of nutrient delivery, supplement formats dominate new product development.⁹ However, when consumers were asked about their preferences, liquid products are favoured, especially those that can be easily incorporate into daily routines – like coffee or tea, water, juice and milk.

73.0%
of new product launches targeting skin health are dietary supplements.⁶

Figure 4.

Proportion of consumer 'likely-to-very likely' to do the following.⁴



Beautifying ingredients

Collagen, vitamin C and E and hyaluronic acid are some of the ingredients consumers most associate with good skin health.

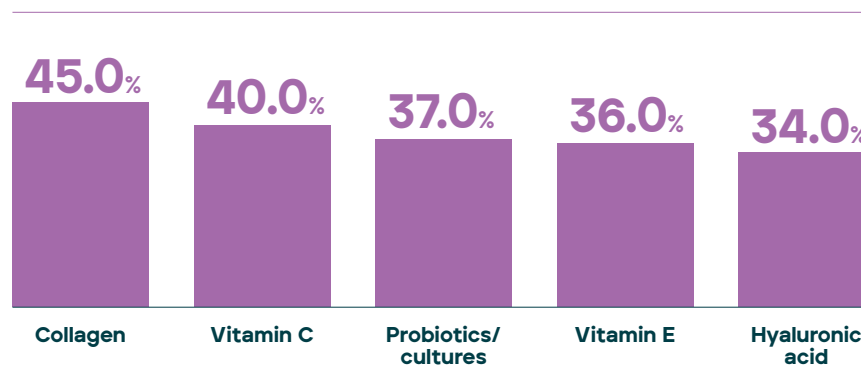
Collagen is well known in beauty, with 45.0% of consumers relating it with skin health.⁴ Collagen is one of the most prominent proteins found in the body helping to support healthy skin and potentially slow the ageing process. As such, it's widely used in beauty products – and thus well-recognised by consumers in the nutricosmetic landscape.

Hyaluronic acid has built a strong reputation in the cosmetic industry too, and has proven popular in nutricosmetics as a result. It is one of the ingredients top of mind for beauty, with 34.0% of consumers associating it with skin health.⁴

Considered an 'all-star' skincare ingredient, hyaluronic acid attracts and binds to water molecules, increasing the water content of skin and supporting healthier, hydrated skin.

In addition to the vitamins traditionally used in skin health, such as vitamins C and E, consumers are becoming more knowledgeable and open to trying new solutions and ingredients to achieve specific benefits. This is creating a space for novel ingredients in the market, not typically associated with skin health, including probiotics, which aim to support healthy skin by balancing the human gut microbiota.

Figure 5.
Top ingredients associated with skin health.⁵





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A market powered by science

With thousands of products making similar declarations, how do brands differentiate?

Nutricosmetics is a global trend that is heavily influenced by cultural preferences in different regions across the world. Despite this though, one thing is clear – science is a point of parity that most consumers value.

Establishing brand trust and credibility is one way to take the lead in the space. And science is a fundamental pillar to achieve this. Market data shows that research-backed claims are key to helping a product gain traction.

What does this mean for you?

Make scientific substantiation an essential part of a product's development and positioning.

Yet, it is not enough to simply state health claims on packaging. Raising awareness and educating consumers about the benefits of specific ingredients is equally crucial.



More than

50.0%

of consumers in the United Kingdom say that proven ingredients are important to them when deciding to purchase a product.⁹

Nearly

1/3

of today's savvy consumers carry out their own research into the efficacy of skincare ingredients before they buy.⁹



'Keeping up appearances' in nutricosmetics:

4 top tips to seize new opportunities

1

Ingredients form the basis of your innovation

Use ingredients that consumers recognise and strongly associate with skin health, such as hyaluronic acid and collagen. But don't be afraid to leverage other trending ingredients.

There is powerful potential for nutricosmetics to cross over into other hot-topic health areas – such as mobility, digestive health, mood, stress and sleep – where consumers are already establishing links to skincare.

Hint

Why not think beyond skin health to raise the shelf-appeal of your product? You can address multiple health areas by combining several ingredients in one solution.

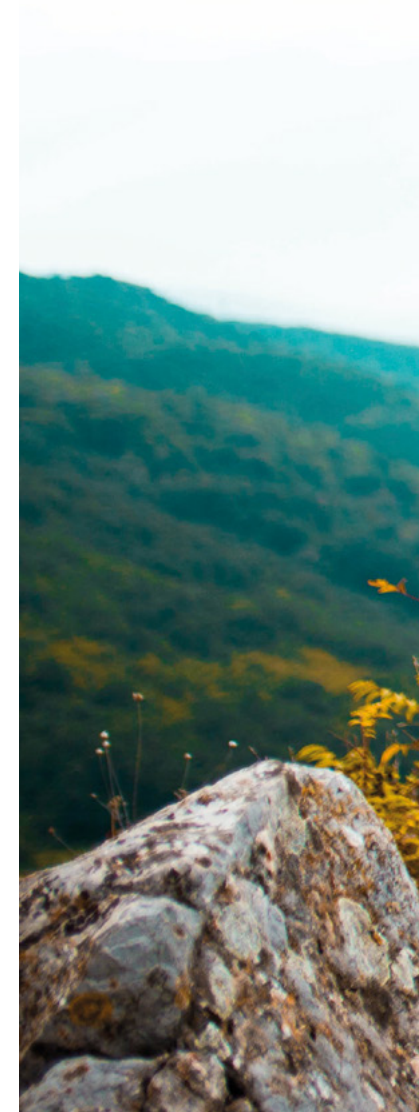
2

Change your language

The beauty conversation has evolved, and so should your messaging. Develop product propositions that speak to everyone, promote inclusive beauty and the foster values of diversity and individuality.

Top Tip

Rather than using descriptors that focus on skin problems in isolation, such as 'anti-ageing' and 'antiwrinkle', brands can employ more positive language like 'vitality', 'healthy glow', 'firming and contouring' and 'nourishing and hydrating' to reflect consumers' newfound desire to support overall wellness.





'Keeping up appearances' in nutricosmetics:

4 top tips to seize new opportunities

3

Exercise transparency

It's up to brands to make it easier for consumers to decipher between competing skin health products. Clearly labelling ingredients on packaging and supporting ingredient claims with reliable scientific evidence and valid sources reassures consumers that the product is aligned with their intentions and values.

4

Think outside the format box

Don't miss the opportunity to push the boundaries of product formulation and capitalise on the growing popularity of novel delivery formats – like gummies, drinks, dairy products and shakes.

Suggestion

Consider whether your product can be easily incorporated into consumers' daily routines.



Nourish your nutricosmetic portfolio with Dermial®

Explore a new era of possibilities in the nutricosmetic market with Dermial® – the first hyaluronic acid matrix ingredient for skin & beauty innovation.

Made up of three naturally-occurring components – hyaluronic acid (60–75%), other glycosaminoglycans, like dermatan sulfate and collagen – Dermial® is a hyaluronic acid solution with a difference. It's a unique science-backed ingredient that works in synergy to increase endogenous hyaluronic acid production, type I and III collagen synthesis and elastin production, in addition to enhancing skin cell proliferation.^{10,11}

Through this action, it supports hydration, nourishes skin and demonstrates regenerative properties. Authorised as a novel food in Europe and with GRAS status in the US, it has a solid regulatory framework.

Discover Dermial®



Hyaluronic acid matrix ingredient



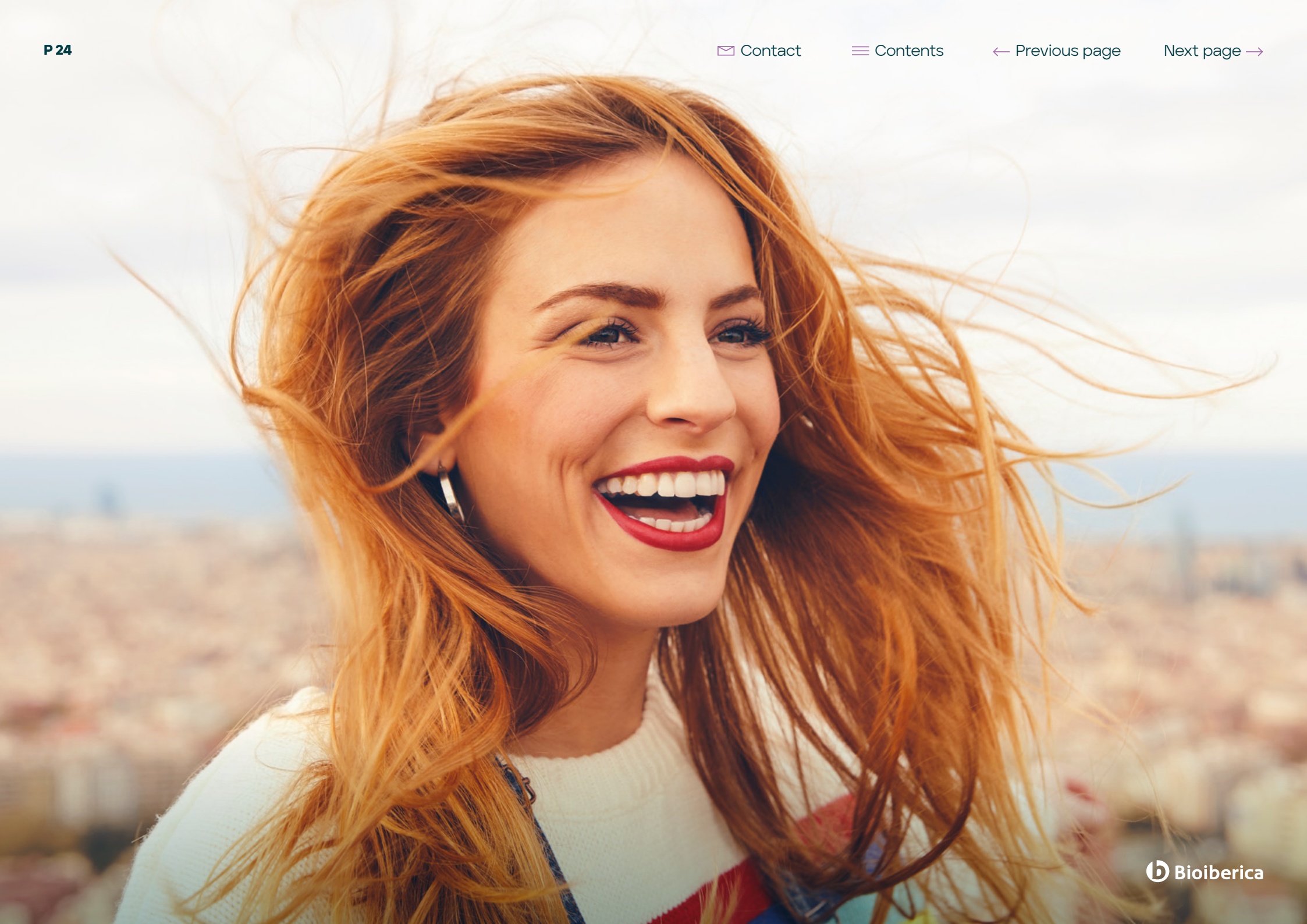
Science-backed



**Low dose
60 mg/day**



Solid regulatory framework



Ready to redefine beauty?

Develop cutting-edge products for the nutricosmetic market with Bioiberica's Dermal[®] solution – contact us today.

Visit: **www.bioiberica.com**
Email: **healthcare@bioiberica.com**
Call: **+34 93 490 49 08**

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