



Ingredient-Led Beauty Report, Part 2:

Exploring the growth and development in Dermocosmetics

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International**



Introduction

The global beauty and personal care industry is undergoing a transformative shift. Fuelled by advances in biotechnology and a surge in consumer awareness and education, the landscape is evolving rapidly.

Empowered by social media and access to an array of free and readily available digital content, beauty consumers have vastly changed the way that they view, value and purchase their cosmetics products. This is driving significant disruption in the cosmetics industry, moving towards a greater focus on ingredient-led and science-backed beauty.

In line with the industry's transition, this report forms part of a wider series from in-cosmetics Global that explores the sector-wide movement towards ingredient-led beauty. The previous report, The rise and influence of ingredient-led beauty, delved into the growth of this key industry trend, debunking common myths about cosmetics ingredients and highlighting their impact on the industry.

As one of the most prominent current trends in ingredient-led beauty, dermocosmetics emerged as the clear focus for this edition of the report. While the line between cosmetics and dermatology has been slowly blurring over the past few decades, dermocosmetics has emerged as a distinct category, offering a unique blend of

cosmetic appeal and dermatological efficacy. Leveraging insights from industry experts across the globe, this report explores this growing sector, its key trends, drivers and challenges. It also examines the crucial role of ingredient selection in dermocosmetics, considerations for formulation, testing and regulatory compliance, in the future of this dynamic market.

Dermocosmetics overview

Before looking at the current function that dermocosmetics play in the world of beauty and personal care, it's important to consider where the category came from and how it's become such a significant force in the industry.

It's widely acknowledged that the term 'dermocosmetics' was coined in the 1970s by Pierre Fabre, a visionary French pharmacist and botanist, who went on to revolutionise the beauty industry with his innovative approach to skincare. His French pharmaceutical and dermocosmetics group now owns a large number of iconic skincare brands including, Avène, Klorane, Ducray, René Furterer, A-Derma and Naturactive.

In the decades that followed, the concept of dermocosmetics has shifted away from basic skin needs, towards products that aim to address legitimate health and wellness concerns.

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Kelly A. Dobos, Consultant Cosmetic Chemist explains, "Dermocosmetics are specialised skincare products that bridge the gap between cosmetics and dermatology, combining beauty and health benefits for the skin. They represent a sophisticated approach to skincare, offering products that are more potent and targeted than regular cosmetics, yet still accessible without a prescription. They provide an ideal solution for those seeking effective skincare backed by scientific research and dermatological expertise."

Dr Kristin Neumann, Co-Founder and CEO at MyMicrobiome, adds that "The primary role of dermocosmetics should be to support skin health and skin barrier and addressing skin concerns like sensitivity, inflammation, acne and ageing."

Dermocosmetics vs traditional skincare

While dermocosmetics and 'traditional' skincare products share many similarities when it comes to ingredients and formulation, they vary significantly in their intended purpose and level of scientific backing.

Neumann explains "The understanding of dermocosmetics should be the focus on therapeutic benefits backed by scientific research and dermatological testing, aiming to protect and preserve a healthy skin microbiome." She adds, "While traditional skincare focuses on hydration, cleansing or anti-ageing, dermocosmetics might target specific skin conditions. They often feature microbiome-friendly ingredients and formulations designed to support the natural balance of skin flora, making them especially beneficial for sensitive or problematic skin."

Brian Freedman, Sr. Director Strategic Marketing, Regional Director North America, Natural Ingredients at Evolved By Nature, adds, "Dermocosmetics are highly focused on skin-health, with serious scientific credibility behind them, and efficacies that go beyond well-ageing to address symptoms associated with skin insult, dysregulation or lack of homeostasis."

Dermocosmetics: An undefined concept

Freedman discusses the issue, explaining that "The term itself [dermocosmetics] is part of a larger problematic dynamic in the industry. In the same way that terms such as "clean" or "chemical-free" have been identified as misleading, in addition to terms like "vegan" (commonly misinterpreted as cruelty free and sustainable, while meaning neither) or "carbon neutral" (which can be achieved through misrepresented carbon offset schemes), we should be careful that 'dermocosmetics' doesn't become another example of marketing masquerading as a movement."

As this comment indicates, undefined and often ambiguous terms in cosmetics can create problems for the industry. Such ambiguity can lead to consumer confusion, misrepresentation of products and, potentially, damage to the industry's reputation. It's imperative that the sector works towards establishing clear and concise definitions for terms like "dermocosmetics" to ensure transparency and trust.

There's no doubt that ambiguity around industry terms is certainly problematic. **Freedman** highlights how having very defined boundaries between dermocosmetics and more traditional skincare options may lead to more positive development for consumers.

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Freedman says all skincare ingredients “should be developed up to the high bar” often associated with ‘dermocosmetic’ ingredients. She said: “This should be the norm across all skincare ingredients and not just this new category.” He suggests that this is the best way to advance health ramifications, while achieving notable well-ageing efficacy along the way.

As the dermocosmetics industry continues to evolve and develop, issues of this kind will likely remain at the forefront of industry discussions, as stakeholders strive to balance innovation, consumer expectations, and regulatory compliance.

Drivers in the market

The dermocosmetics market is a rapidly growing sector. According to Fortune Business Insights [1], was valued at USD 35.77 billion in 2022 and is projected to grow to USD 77.51 billion by 2030, exhibiting a CAGR of 9.9% during the forecast period. But what factors are driving this significant growth?

Consumer awareness of skin health

Many industry experts believe that an increased awareness of skin health among beauty consumers has played a pivotal role in the development and evolution of the industry.

Neumann explains “The growing awareness of skin health, skin barrier and the skin microbiome is driving consumers to seek products that respect the balance and diversity of the skin flora and thus prevent dysbiosis” – an imbalance among the different types of microorganisms living together in the skin’s microbiome [2].

Meanwhile **Dr Sara Raccovelli and Dr Caterina Deganutti, industrial researchers at Transactiva**, advise that growth is being driven

by “a demand for effective solutions to common concerns like redness and dryness, and a shift toward sustainability in cosmetic products. Innovations in biotechnology, such as plant-based production systems, have enabled the creation of highly effective, environmentally friendly ingredients that align with these trends.”

According to **Dr Romun Leavitavat, Dermatologist and Medical Consultant**, “One of the biggest drivers of dermocosmetics is social media. Social media platforms can impact both consumers and the wider industry in a lot of ways. Right now, so much knowledge is being shared back and forth on social media that consumers feel like they have everything they need to know. But for me, at some point, dermocosmetics can end up being used as too much of a marketing tool. This is mainly because there are currently no organisations certifying whether a product should be classified as dermocosmetics or not. In the future, I’d like to see an organisation or framework by which dermocosmetic products are able to be certified to improve patient safety and consumer trust.”

Generational demand

As indicated previously, the growth of dermocosmetics is being largely driven by consumer demand. However, the specific demographic of these beauty consumers is an important element to consider, as it paints an illuminating picture of the industry, and the diverse nature of the generational demand for these products.

Leslly Brito, Key Account & Business Development Manager for Personal Care, Freelance or Consultants, highlights the impact of a significantly ageing population.

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For example, data from the World Health Organization (WHO) [3] suggests that by 2030, one in six people in the world (1.4 billion) will be aged 60 years or over, which is an expected increase from 1 billion in 2020.

Neumann suggests that “An ageing population, who are likely interested in skin health, is a significant driver of the market, as dermocosmetics probably can effectively address age-related changes while supporting the skin microbiome.”

Recent data from **Euromonitor International** supports this idea. Research from its 2022 Voice of the Consumer Beauty Survey found that, out of all generations, Generation X registered more positive shifts to ingredient features in skin care. The research suggests that Generation X desires skin care that contains natural ingredients, followed by ingredient transparency. The data showed that Baby Boomers were the next generation to seek out more ingredient-led features in 2022, compared to 2021.

Despite this, Gen Z consumers are also emerging as a key demographic for dermocosmetics. Unlike previous generations, Gen Z has grown up with access to vast amounts of online information about skincare and health, fostering a strong interest in preventative care and a focus on long-term skin health. As digital natives, they are comfortable researching and comparing products online before making informed purchases.

Additionally, Gen Z evidently has a very different relationship with social media – which has emerged as a key driver of the dermocosmetics market. For example, according to data from Survey Monkey [4], more than half of all Gen Zers (58%) have made a purchase based on a

recommendation from a social media influencer or content creator – higher than any of the other generations surveyed.

This contrast in generational demand highlights the versatility of dermocosmetics. By catering to both the concerns of an ageing population seeking solutions for wrinkles and dryness, and a younger generation focused on acne treatment and prevention, and sustainability, dermocosmetics demonstrate their ability to address a wide spectrum of skin needs.

Key trends in the dermocosmetics industry

As the dermocosmetics industry continues to evolve and grow, several key trends are shaping the future of skincare. Many of these trends are being driven by advances in technology, increasing consumer awareness, and a growing demand for personalised and effective solutions.

Technology driving innovation and personalisation

With technology developing at a rapid pace, it's being increasingly adopted by skincare brands looking to revolutionise their offerings and keep up with a competitive market.

Cosmetic Scientist, Faiza Hussain, Co-founder and Head of Product Innovation at NEX Skincare describes the importance of advanced technologies, artificial intelligence (AI) and personalised solutions in dermocosmetics. She suggests that real-time “AI-driven skin diagnostics, with capabilities to analyse skin at a cellular level and provide insights into individual skin needs, as well as advanced technologies, will be essential for enhancing ingredient bioavailability and efficacy through delivery systems.”

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Meanwhile, she also advises that “tailored formulations created with specific individual skin needs and goals in mind” will be another key focus.

Amid the rise of AI and machine learning (ML), skincare brands are increasingly investing in technology to analyse vast amounts of data on skin types, concerns and environmental factors. This is enabling them to develop highly personalised skincare regimens, which can be tailored to the individual needs of each consumer.

AI-powered skin analysis tools can also provide accurate assessments of skin conditions, helping to identify specific concerns and recommend appropriate products. Additionally, AI can be used to optimise ingredient formulations, ensuring maximum efficacy and minimising potential side effects.

A science-backed approach

Discussing one of the most impactful and prevalent trends in the dermocosmetics space is **Benoit Canolle, CEO of Skinosive.**

He advises, “Dermocosmetics is a definitively science-driven discipline. Following years of innovation based only on formulation optimisation, it brings science and innovative molecules to cosmetics. We observe a huge increase in high quality publications and a science-proven approach. We are sure that this global trend will be reinforced in the next few years, allowing products that offer a science-proven efficacy.”



Chapter 1: Power Players in Dermocosmetics Ingredients



Ingredient selection is a cornerstone of dermocosmetic formulation, with each ingredient playing a specific role in achieving the desired product performance and skin benefits.

As today's beauty consumers are now more informed and discerning than ever before, eager to understand the science behind their skincare products and seek out effective, innovative solutions, skincare brands are under pressure to deliver efficacious products in a transparent and sustainable manner.

Dr Andrea Mitarotonda and Dr Sara De Mattia, Cosmetic Chemists at ME&theCHEMIST - Cosmetic Consultancy Labs discuss the importance of ingredients selection in dermocosmetics, particularly from a consumer perspective.

Mitarotonda and De Mattia advise, "We should not forget that this category has evolved as both a substitute and a complement to medical recommendations. Therefore, besides providing effective solutions to skin problems, dermocosmetics are also looking to support the long-term health of the skin, in line with current trends. This is also reflected in the choice of ingredients, which, on top of efficacy, must also take into account increasing consumer awareness".

"In this regard, dermocosmetics make use of efficacious, well-established molecules, most of which are backed by strong dermatological and pharmaceutical literature and trials to prove effectiveness at addressing particular skin conditions."

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By carefully selecting and combining ingredients, formulators are able to create dermocosmetics products that are both effective and safe.

But what are some of the most important ingredients and ingredient categories used in the formulation of dermocosmetics? And why are these ingredients so important with regards to functionality?

Exploring Active Ingredients

Active ingredients are considered to be the workhorses of dermocosmetics formulations, targeting specific skin concerns such as ageing, acne, and hyperpigmentation, whilst also looking to improve overall skin health.

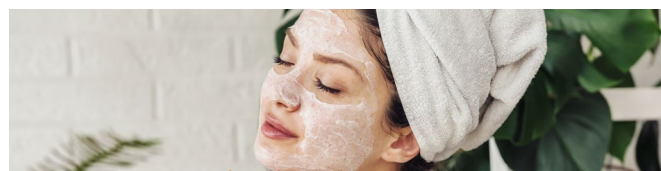
There are a number of specific actives that are currently popular with consumers, including retinol, hyaluronic acid, salicylic acid, benzoyl peroxide and azelaic acid – which each offer a specific function. For example, hyaluronic acid is good at retaining water, so is primarily used for hydration. Meanwhile, benzoyl peroxide is typically used to treat acne and rosacea. While salicylic acid is another ingredient commonly used in acne treatments, the two elements work differently.

In fact, Cosmetics Business [5] recently revealed that salicylic acid was most searched for skin care ingredient of 2024. Known for its ability to target acne, reduce inflammation and unclog pores, salicylic acid was found to have produced 60,500 average monthly searches. Unsurprisingly, the data found that retinol and its derivatives (like vitamin A) – which are used for a wide range of skin concerns – secured the second spot with 49,500 monthly searches.

Additionally, **Dobos** discussed some of the popular actives which are useful for targeting anti-ageing. She says, “Retinol and other Vitamin A derivatives are still the gold standard

for ageing skin. They smooth fine lines by promoting cell renewal and stimulate collagen production. They are highly effective at improving overall skin texture.”

What other ingredients and ingredient categories are leading the way in dermocosmetics?



Bioactive polypeptides and proteins, and hydrolyzed proteins

Raccovelli highlights several of the key active ingredient categories. She explains, “Bioactive Polypeptides and Proteins are advanced ingredients designed to mimic or enhance natural skin processes. Their benefits include improving the appearance of hydration and elasticity, soothing visible signs of irritation and supporting the skin’s overall vitality. They are highly versatile and can be tailored for various applications, from anti-ageing to calming sensitive skin. Additionally, bioactive polypeptides are often produced using innovative, sustainable biotechnological methods, ensuring consistency and eco-friendly sourcing.”

She adds “Hydrolyzed proteins are smaller protein fragments which are ideal for skin that needs extra care. They help retain moisture, provide a smoothing effect, and improve the texture of formulations, making them suitable for lightweight products like serums or hydrogels. Hydrolyzed proteins can also serve as film-formers, creating a protective barrier on the skin’s surface to enhance comfort and reduce visible dryness. Their versatility makes them a valuable addition to dermocosmetic formulations.”

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Antioxidants

Dobos highlights the importance of antioxidants and their role in the creation of dermocosmetics. She says, "Antioxidants are another key category. They are essential for defending against environmental stressors like UV rays and pollution, making them a crucial component of any effective skincare regimen. Vitamin C as ascorbic acid is a great antioxidant but it is hard to stabilise in cosmetic products. Vitamin C derivatives like ascorbyl glucoside and tetrahexadecyl ascorbate are efficacious and allow for greater formulation flexibility."

Neumann explains antioxidants such as Vitamin C and Niacinamide "help to protect the skin from environmental stressors and free radicals." She adds, "They support skin resilience and help maintain a healthy microbiome by reducing oxidative stress, which can destabilise microbial balance."

UV filters and sunscreen agents

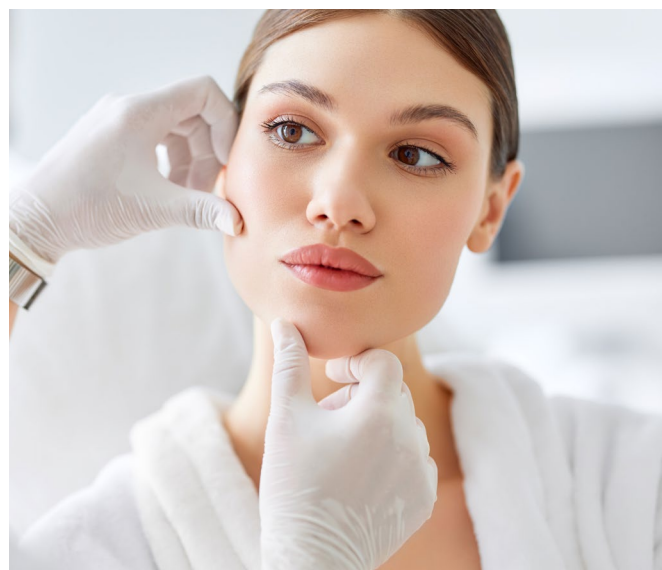
Ultraviolet (UV) filters are another essential component of dermocosmetics, particularly in sunscreens and daily moisturisers with SPF. By incorporating UV filters into these products, consumers can protect their skin from the harmful effects of the sun, such as premature ageing, sunburn and skin cancer. These filters work by either absorbing or reflecting UV radiation, preventing it from damaging the skin.

Discussing UV filters in more detail, **Canolle** explains that many of the pain points associated with this category of ingredients are due to their age. He says, "UV filters are so old, and therefore, many pain points are associated with this category of ingredients. However, due to the 'SPF race', the quantity used is amazing; it can be 30% of the total product (something which is

unique in cosmetics and dermatology in general) impacting the possibility to innovate with a good formula, impacting the environment and finally the safety as all UV filters more or less penetrate into skin. We need disruptive innovation to generate a new generation of efficacious and safe UV filters."

The careful selection of ingredients is paramount to the development of effective and safe dermocosmetics products. As consumers become increasingly informed and discerning, the demand for innovative, science-backed skincare solutions continues to grow. Dermocosmetics, with their focus on skin health and well-being, are well-positioned to meet these evolving needs.

By incorporating a diverse range of ingredients, formulators can address a wide spectrum of skin concerns, from ageing and pigmentation to acne and sensitivity. As the industry continues to grow and develop, we expect to see even more innovative and efficacious ingredients which will deliver even better results for dermocosmetics products.



Chapter 2: Considering Formulation



While effective formulation is essential for any beauty and personal care item, it's particularly important for dermocosmetics. Using the right ingredients and processes to create a well-formulated dermocosmetics product is crucial to target the specific skin needs that each product is aiming to address.

Dobos explains, "When formulating dermocosmetics, we're aiming for targeted, measurable effects on skin health. First, we start with a deep understanding of skin biology and the specific skin concern we're addressing. We're looking at things like the skin barrier function, cellular processes and even the skin microbiome. Then, we carefully select ingredients that have solid clinical evidence behind them."

When it comes to formulation, **Deganutti** reiterates the importance of "careful selection of ingredients with proven skin benefits" and "ensuring their compatibility with sensitive skin." She said: "Advanced production technologies

allow for the creation of bioactive compounds that are both effective at low concentrations and sustainable. Stability and efficacy testing are also crucial to guarantee product performance over time."

So, what are the specific considerations which need to be taken into account when formulating dermocosmetics?

Focusing on the microbiome

As a key element of our skin health, it's essential to consider and take care of the microbiome in the formulation of dermocosmetics.

Neumann explains, "In cosmetics and dermocosmetics alike, preservation is crucial to prevent contamination without affecting the skin's microbiome. This involves balancing the preservative concentration against its microbiome-friendliness."

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As best practice, **Neumann** recommends using microbiome-friendly ingredients. She suggests, "Prioritising gentle ingredients in mild concentrations, which support skin health without disrupting its microbial community. Ingredients such as surfactants must be chosen carefully, as these ingredients have the strongest impact on the skin's microbiota"

Ensuring a balanced pH

Neumann explains the importance of a balanced pH balance in dermocosmetics. She advises, "The formulation process for dermocosmetics must maintain an optimal pH range (4.5-5.5) to support a healthy skin barrier and microbiome, as an imbalanced pH can lead to dysbiosis."

Similarly, **Brito** advises that dermocosmetics require a pH-balanced formulation, in order to minimise irritation. As such, she explains that skin sensitivity testing is generally required in the creation of dermocosmetics.

Enhanced safety and testing processes

Dobos explains, "Safety and efficacy testing for dermocosmetics is much more extensive than for regular cosmetics. We're not just looking at basic skin compatibility - we're often conducting clinical trials to prove our products can deliver on specific skin health claims."

Brito reiterates this point, highlighting that "Dermocosmetics often undergo clinical trials to validate claims, a step less common in traditional skincare."

Despite requiring considerably more time and resource, more extensive research and development and testing process will deliver products that are both safe and effective, meeting the high expectations and needs of consumers.

Mitarotonda and De Mattia believe, "The formulation process should not change depending on the type of product under development". Rather, in order to formulate outstanding products, they recommend an "Approach underpinned by a strong scientific and technical background (e.g. cutaneous pathology, anatomy & physiology, pharmaceutical technology, polymer and colloid chemistry)."

They add, "This is to enable an in-depth knowledge of the ingredients and the product formats, an understanding of the target the product will be addressing (e.g. atopic prone skin, scalp), thorough awareness of the regulatory frameworks to comply with (e.g. cosmetic, medical device), and a clear insight into the target consumers (e.g. demographics, sensorial likings)."

Dermocosmetics formulation requires a meticulous approach, considering both efficacy and safety. By carefully selecting ingredients and optimising the formulation process, brands can create products that deliver targeted benefits and improve overall skin health.



Chapter 3: The Regulatory Landscape



The regulatory landscape for dermocosmetics is a complex and ever-evolving view. As the industry continues to grow and innovate, regulatory bodies worldwide are working to establish guidelines and standards to ensure the safety and efficacy of these products.

Given the purpose and functionality of these products, regulatory compliance is a critical aspect of dermocosmetic development and commercialisation. Adhering to the relevant legislation will be essential to protect consumer health and maintain market credibility. However, the diverse regulatory frameworks across different regions can pose significant challenges for brands seeking to launch their products globally.

In this section, we will delve into the key regulatory considerations for dermocosmetics,

primarily focusing on the various challenges in the industry.

A regulatory grey area

The lack of a formal, standardised definition for dermocosmetics means that the regulatory landscape around this category of products can be considered slightly blurred.

Mitarotonda and De Mattia explain, "There doesn't seem to be a standard definition for 'dermocosmetics', nor specific regulatory requirements that differentiate this category from those covered by the current cosmetic regulatory frameworks."

Freedman adds, "Dermocosmetics, similar to cosmeceuticals, is not a Food, Drugs, and Cosmetics (FD&C) recognised term, and therefore, has no meaning under the law.

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This can make the regulatory landscape a bit cloudy, which always introduces risk to ingredient suppliers and brands. Some of the challenges of complying with the regulations include determining whether the product is a cosmetic, a drug, or in some cases, both. And what the lines are in terms of claims statements.”

“To give the impression of a dermocosmetics product, the desired claims will tend to lean towards more therapeutic indications and that can be a very sensitive area from a regulatory perspective. Having a very strong grasp of the red lines here is critical, so that it is clear what the ingredient or product does for the consumer, without crossing lines that can lead to punitive actions for companies. Each product category has varying regulations, and we must ensure we are meeting the correct standards to accompany such a product.”

Additionally, despite the terms often being used interchangeably, **Léa Seidenbinder, Skin Care Global Marketing Manager at Syensqo**, states that “Dermocosmetics are not cosmeceuticals”. She explains that, because they generally considered to be ‘cosmetics’ by industry bodies and regulators, there are no specific requirements when it comes to legislation.

Regional challenges

As with many beauty and personal care items – not limited to dermocosmetics – regulation is primarily a challenge due to the lack of consistency and coherence across different regions, making it difficult to launch and market products globally.

Discussing the issue, **Dobos** says, “As dermocosmetic products are often sold internationally, ensuring compliance across different markets can be challenging.

Each market may have unique requirements for product registration, ingredient disclosure, safety standards and marketing.”

Reiterating this, **Brito** explains “To navigate differences in global regulatory requirements, it's critical to substantiate labelling claims with clinical data and stay updated on bans or restrictions on certain ingredients.”

To address these challenges, it's crucial for industry stakeholders, including regulatory bodies, to collaborate and develop clear guidelines and standards for dermocosmetics. This would provide much-needed clarity and streamline the regulatory process, fostering innovation and ensuring consumer safety.



Conclusion



The global beauty and personal care industry is undergoing significant change. Driven by a surge in consumer awareness and a growing demand for ingredient-led, science-backed skincare solutions, dermocosmetics – a category that bridges the gap between cosmetics and dermatology – has emerged as a key player in this revolution.

This report has explored the rise of dermocosmetics, examining its historical context, its key characteristics, and its differentiation from traditional skincare options. We have delved into the crucial role of ingredient selection in dermocosmetic formulation, the complexities of formulating for specific skin concerns, and the rigorous testing procedures that ensure product safety and efficacy.

A key challenge facing the industry is the lack of a standardised, legal definition for the term 'dermocosmetics'. This ambiguity can lead to confusion for consumers, brands and other

organisations in the cosmetics supply chain. While some argue that all skincare products should aspire to the high bar often associated with dermocosmetics, others advocate for establishing clear distinctions between the categories. Regardless of where the industry lands on this debate, it's clear that transparency and consumer trust are paramount.

Research suggests that the dermocosmetics market is currently experiencing significant growth, fuelled by factors such as increased awareness of skin health, demand for effective solutions to specific concerns, and a shift towards sustainable beauty practices. Looking ahead, several trends are shaping the future of dermocosmetics, including advancements in AI-driven diagnostics and personalised formulations, a continued focus on ingredients sourced through safe and sustainable practices, and a heightened awareness of the skin microbiome's role in overall skin health.

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Regulatory compliance remains a complex issue in the dermocosmetics industry. The lack of a unified global standard necessitates navigating a landscape of diverse regional regulations, which can pose challenges for brands seeking to launch products internationally.

As the dermocosmetics industry continues to evolve, stakeholders across the supply chain – from ingredient manufacturers to formulators, brands, and regulatory bodies – will need to work together to address these challenges. A focus on innovation, ingredient transparency and rigorous testing procedures will be essential to ensure the continued growth and success of the dermocosmetics market.

As technology and consumer expectations continue to evolve, it is evident that dermocosmetics are poised to play a leading role in shaping the future of skincare.

in-cosmetics Global will delve deep into the world of dermocosmetics at its upcoming show. In addition to a live panel discussion, the 2025 exhibition will host a series of educational conference sessions and show features focusing on dermocosmetics and related topics.



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 <https://www.euromonitor.com/industry/health-beauty>

Contributors

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