



Cosmetic sector : the place of plants and and naturalness

Kick-off event of the
AgriWasteValue project

- International cosmetic market
- French cosmetic industry
- French cluster COSMETIC VALLEY and international connections
- Trends and Naturalness in cosmetic industry



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THE COSMETIC SECTOR

Perfumes & Cosmetics at a global level in 2018

A world market of **\$ 481 bn** (Consumption)

5% growth rate

\$ 83 bn in Europe

\$ 76 bn in the US

\$ 48 bn in China

\$ 34 bn in Japan

\$ 28 bn in Brazil

A world leader for exportation : the French Perfumes & Cosmetics sector

The **2nd contributor** to the French trade surplus

246 000 jobs

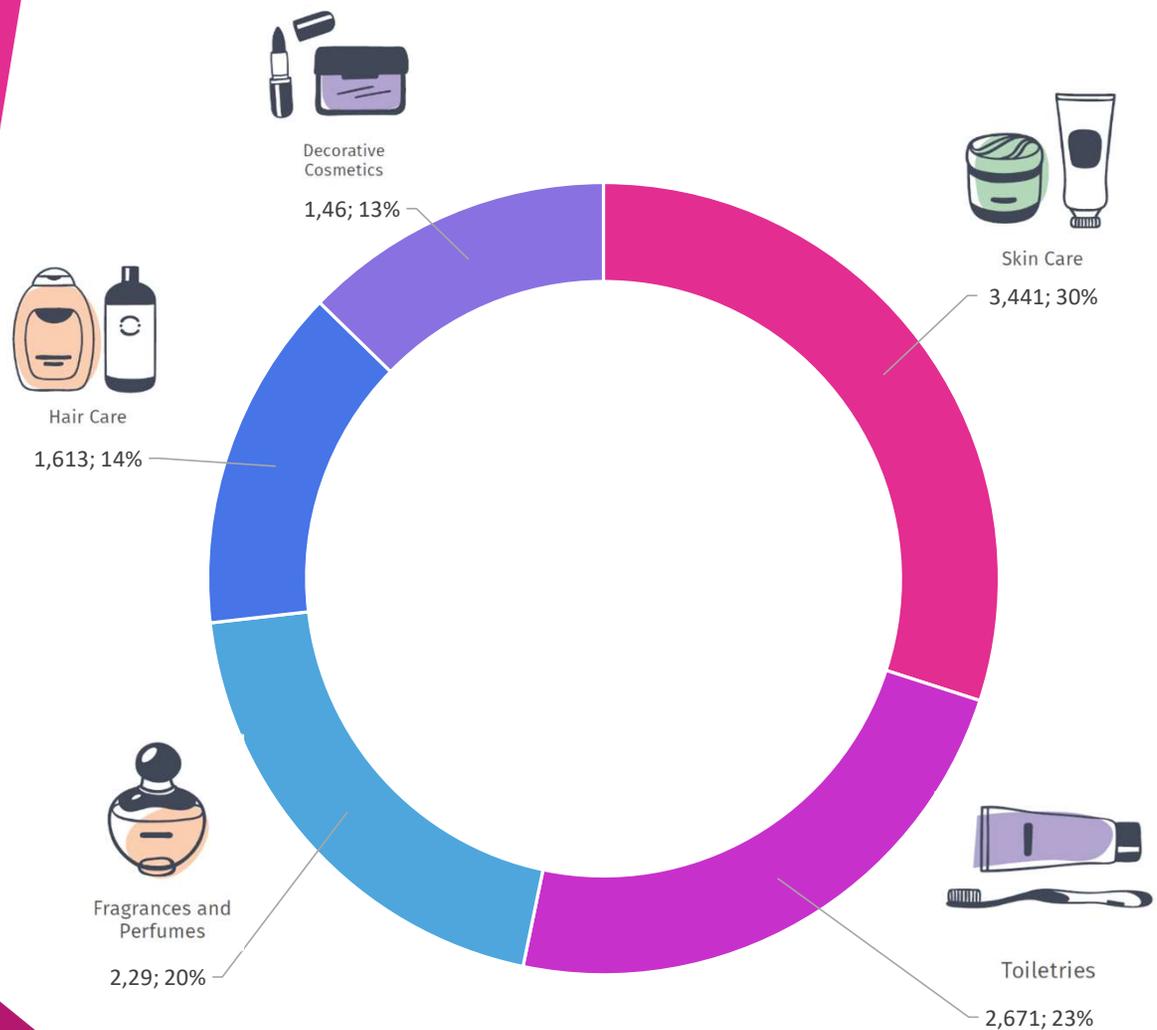
3 200 companies



French cosmetic market 2018

€11.429 Billion
(+0.31%)

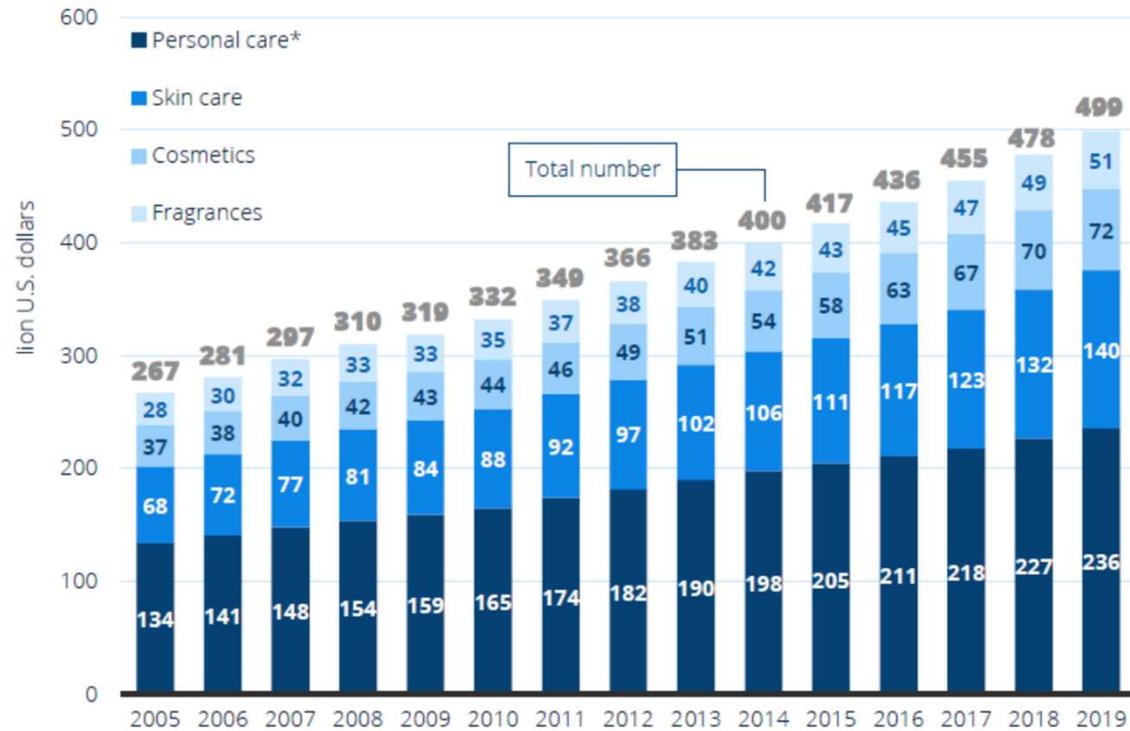
15% of
European
market



A growing market



+5% to +5.5%
 market growth



Note: Worldwide; 2020

*Personal care includes bath, hair care, men's shaving, oral care, sun care products, deodorants, and depilatories.

Source(s): McKinsey; Euromonitor; [JD 550657](#)



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Description of the pathway



COSMETIC ECOSYSTEM

3,200 companies
including 80% SMEs



2nd exporter of French
economy



200 laboratories



246,000 jobs



€45 billion turnover



8,000 researchers



400 research projects
worth €450 million



100,000 students



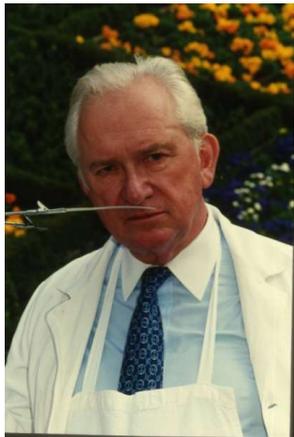
10 Universities, French
National Research
Council (CNRS), INRA



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COSMETIC VALLEY

70's : Cosmetic plants are “ decentralized “ from the Paris area (towards Chartres for Guerlain, Coty-Lancaster or Paco-Rabanne ; towards Orléans for Dior and the LVMH R&D, etc.)



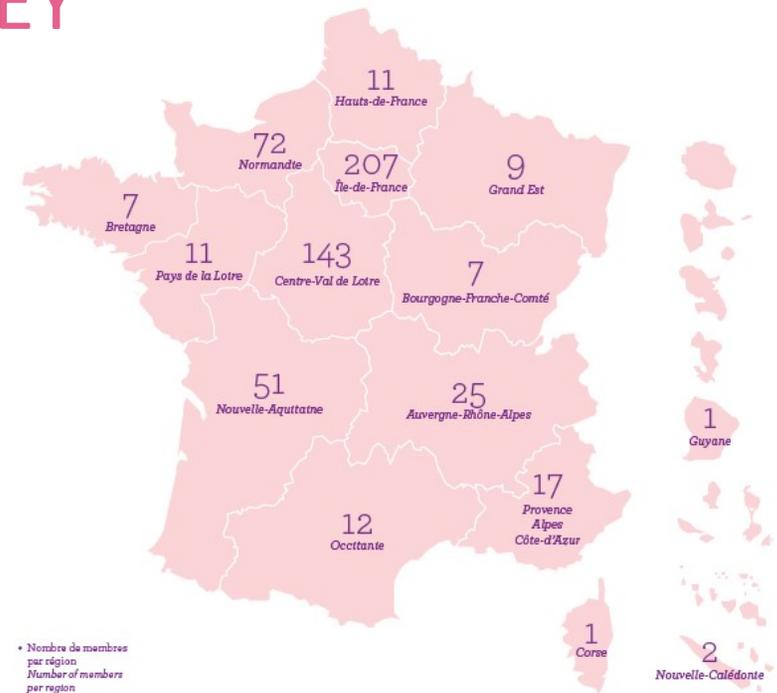
1994 : Creation of the *Cosmetic Valley*

1st President : Jean-Paul GUERLAIN

2005 : *Cosmetic Valley* becomes a “ pôle de compétitivité “ (cluster) and extends its territory to three regions (Centre, Normandie and Ile-de-France)

2014 : *Cosmetic Valley* is granted by the State the mission of “ structuring the Perfumes & Cosmetics sector at a national level “

2018 : *Cosmetic Valley France*





Services of Cosmetic Valley

- Networking
- Export support
- Congresses & Training
- Business Intelligence
- Research and Innovation





International Partnerships

Create a worldwide dynamic
25 International partnerships



BEAUTEVILLE	China
ORIENTAL BEAUTY VALLEY	
CHINA COSMETIC NEWSPAPER	
GUANGDONG LIGHT INDUSTRY ASSOCIATION	
SHANGHAI JIADING NEW CITY DEVELOPMENT Co Ltd. Et SHANGHAI QIANYANG INVESTMENT MANAGEMENT Co. Ltd.	
ANDI ASOCIACIÓN NACIONAL DE EMPRESARIOS DE COLOMBIA	Colombia
BIO INTROPIC	
UNIVERSIDAD NACIONAL DE COLOMBIA	Spain
BEAUTY CLUSTER BARCELONA	
POLO DELLA COSMESI	Italy
JAPAN COSMETIC CENTER	Japan
Cluster CHESE	Madagascar
BIOECONOMY CORPORATION MIDA	Malaysia

CENTER OF EXPERTISE FOR PLANT COMPOUNDS	The Netherlands
Tahiti Fa'ahotu	French Polynesia
UNIVERSITE DE LA POLYNESIE FRANCAISE	
QUEBEC INTERNATIONAL	Quebec
CAMP	
TRANSILVANIA LIFESTYLE	Romania
Université Cheikh Anta Diop Dakar	Senegal
Université d'Al Hawash	Syria
TAIWAN BEAUTY VALLEY	Taiwan
THAILAND CENTER OF EXCELLENCE FOR LIFE SCIENCES (TCELS)	Thailand
HANOÏ UNIVERSITY OF PHARMACY	Vietnam



Cosmetic 360, the unique international fair dedicated to innovation in the perfumery- cosmetics sector

- **220** exhibitors including **30** start-up, **6** majors (L'Oréal, Chanel, Nuxe, LVMH Research, Rodan+Fields, IFF), **30%** international, **6** winners at the Cosmetic 360 Awards
- More than **5 000** unique visitors (+10% vs 2018)
- **70** countries represented – $\frac{1}{4}$ international visitors
- Strong media coverage: **487** french articles and **235** international articles
- **180** Open Innovation sessions
- **11** prospective conferences



<https://www.cosmetic-360.com/>



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Trends

Artificial Intelligence



Plastic free



L'Oréal x Albéa
Cardboard
Tube
(launch 2020)

Clean Beauty



Naturalness



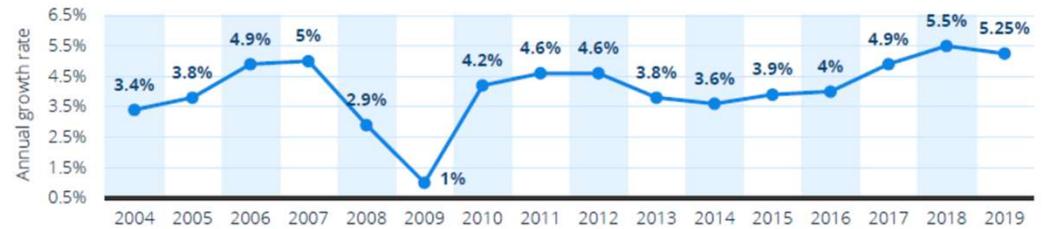
COSMETIC
VALLEY
FRANCE

NATURAL AND ORGANIC COSMETICS

STATISTA DOSSIERPLUS ON THE GLOBAL NATURAL AND ORGANIC COSMETICS MARKET AND THE RISE OF "CLEAN BEAUTY"

Natural and organic market

Annual growth of global beauty* market



Annual growth of the organic and natural beauty** market



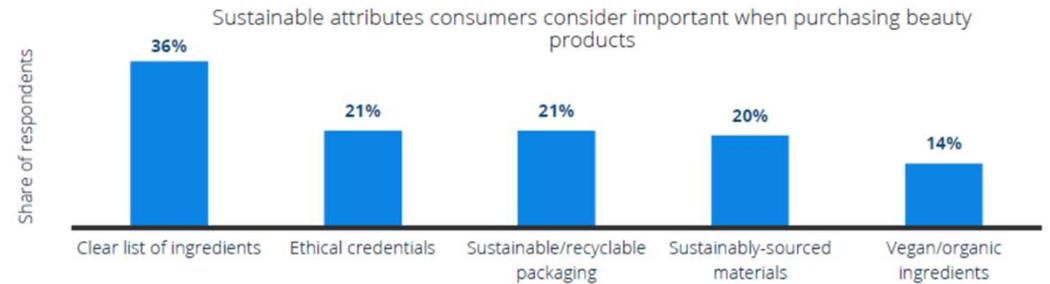
1) Note(s): *Cosmetics market excluding soap, oral hygiene, razors, and blades

Source(s): L'Oréal; [ID 297070](#)

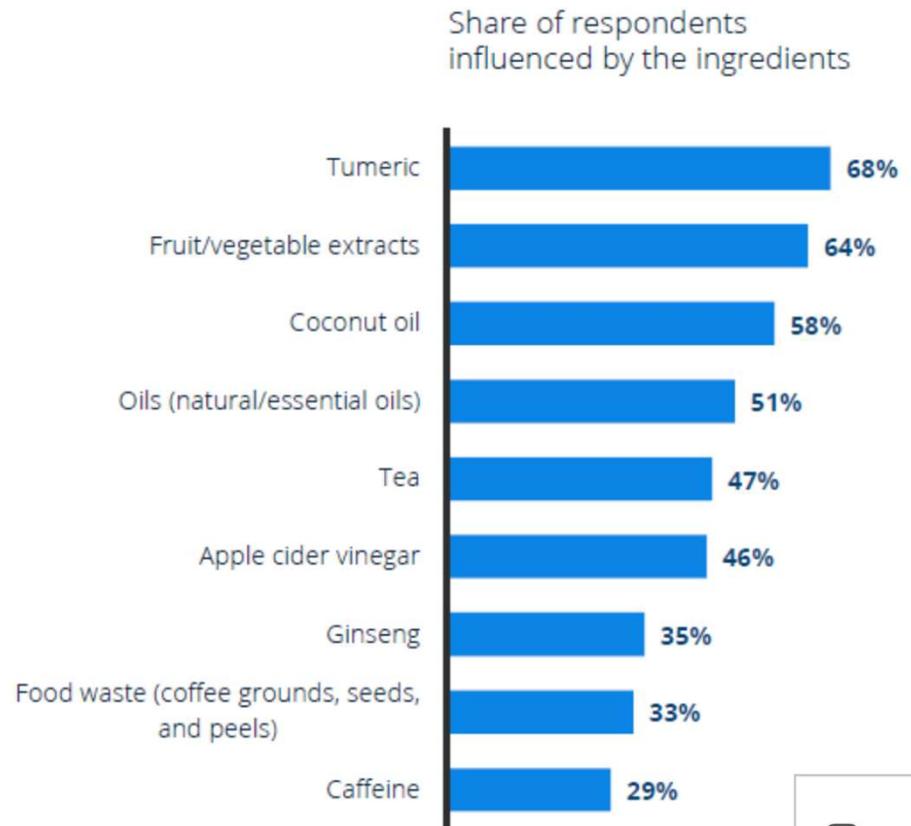
2) Note: Worldwide; 2020; **Excluded are products for cleansing and care and professional products or services; e: estimated.

Source(s): Statista Consumer Market Outlook; [ID 1118271](#)

Natural beauty consumers are moving towards sustainable/clean



Natural consumers are looking for healthier and food-inspired ingredients



Note: Worldwide; Q3 2019; 29,000 respondents
Source(s): GlobalData; [ID 1133356](#)

Why Natural sourcing?



- **Reducing the environmental impact of products :**
 - Use natural resources, renewable product
 - Reduce packaging --> new materials, recycle, development of bulk (refilling)
 - Develop short circuit
 - Develop green technologies : biotechnologies, éco-extraction
- **To increase % of naturalness asked by consumers**
- **To develop multifunctional molecules to decrease raw materials number used**
- **Substitute synthetic material to meet challenges :**
 - Microplastics
 - Preservative molecules
 - Silicones : texture, sensory raw material

Witch kind of molecules ?



- Sort of molecules required :
 - Active molecules : moisturised, antioxidant, nourishing, hyaluronic acid...
 - Fonctionale ingredients : emulsifier, **texturing agent, oil, grease, colorant...**
 - Natural preservative molecules
- Use vegetal extracts
- Use of multifunctional molecules → natural modified molecules

Important criteria

- **Industrial constraints to take into account**
 - Availability
 - Reproducibility
 - Traceability
 - **Necessity of joining other industrial applications**
 - Possibility of used (Nagoya protocol)
 - Pesticide used
 - No used of GMO
 - China list
 - REACH legislation



Diapositive 23

AG2

Amandine GOUBERT; 26/01/2021

Post Covid Trends: The situation clearly reinforces the trend of naturalness

Stress & Well-being

- **Eco-anxiety**
 - Global Warming
 - Atmospheric pollution

- **Digital Stress**
 - Blue light



Search of well-being

- Skin care increase
- Naturalness
- Cosmeto food
- Sport / Méditation / Yoga



Zero waste

- Consumer aware of its environmental impact
- Solid cosmetics (less water)
- Refillable packagings
- Local sourcing
- Short formula
- Natural products
- Committed purchase



Yves Rocher



900.care



Cozie



Hibar



Natural sourcing

- Superfruit – SuperFOOD
- Upcycled Skin Care Ingredients
- Antimicrobial products
- Probiotic are a food source for microorganisms.
- Use of ferments



Cosmetic Valley
1, place de la
Cathédrale – 28000
Chartres
Tél. : 02 37 211 211
[www.cosmetic-
valley.com](http://www.cosmetic-valley.com)

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Amandine Goubert, R&I Director – agoubert@cosmetic-valley.com