

SPATE

SEPTEMBER 2020

TOP SUSTAINED RISERS: INGREDIENTS REPORT



INTRO

When it comes to the beauty category, consumer behavior is driven by ingredients. This report highlights the ingredients that are most likely to be top of mind for Americans in the next year.

These ingredient trends are safe bets and are likely to last. Whether or not your current product portfolio supports these trends, it will be important to consider how these trends will impact your audience, brand, and business — because these ingredients are not going away.

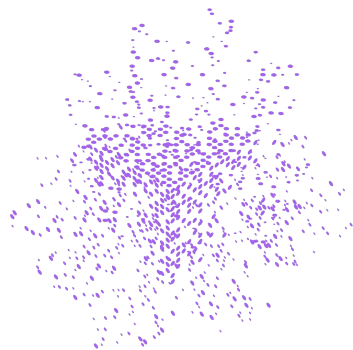
Spate analyzed over 10BN search signals to identify top trending ingredients. Why search data? Every time a user types a query into the search bar, they are sharing what is top of mind for them — often including concerns, questions, and context they might not share elsewhere. Spate captures billions of queries that project an unbiased lens on real consumer behaviors and needs.

Have questions? Sign up for a [free custom report](#) to get your questions answered.

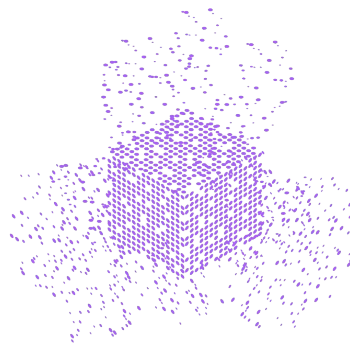
Thank you,

Olivier and Yarden, co-founders of Spate

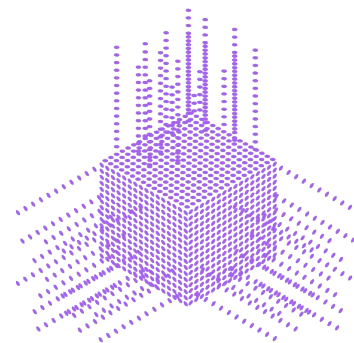
METHODOLOGY



+10B beauty related
search signals in the US



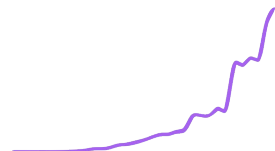
Unsupervised machine
learning to identify clusters



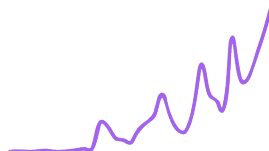
Trends classification for
insights and implications

CLUSTERING EXPLAINED

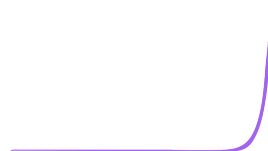
To identify top trends, we categorize Spate data into six different clusters based on similar trend behaviors.



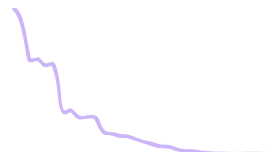
SUSTAINED RISERS



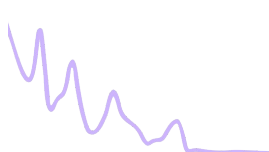
SEASONAL RISERS



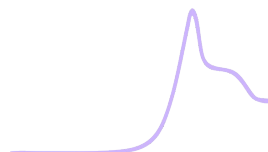
RISING STARS



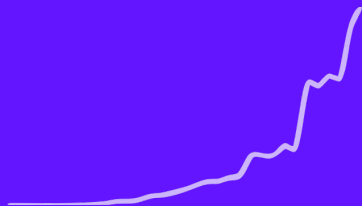
SUSTAINED DECLINERS



SEASONAL DECLINERS

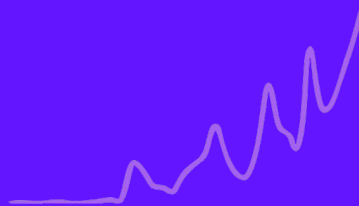


FALLING STARS



SUSTAINED RISERS

Steady growth over the past years, these trends are safe bets



SEASONAL RISERS

Seasonal trends that are likely to come back even stronger



RISING STARS

Sudden growth within the past months, these trends are riskier

TOP SUSTAINED INGREDIENTS (OVERALL)

Trends per category ranked by volume:

SCIENTIFIC

Sustained Ingredient	Growth
hyaluronic acid	+31.8%
azelaic acid	+53.1%
retinoid	+47.6%
BHA	+64.6%
squalane	+56.8%
ferulic acid	+33.8%
hydrogenated polyisobutene	+82.0%

NATURAL

Sustained Ingredient	Growth
ashwagandha	+22.0%
saw palmetto	+26.5%
bladderwrack	+39.4%
CBG	+61.5%
sunflower lecithin	+27.3%
bakuchiol	+145.8%
murumuru	+29.0%

Source: Google Search data, year-over-year growth comparing the past 12 months ending August 2020 vs the 12 months prior (US).

TOP SUSTAINED INGREDIENTS (BY CATEGORY)

Trends per category ranked by volume:

SKIN CARE

Sustained Ingredient	Growth
BHA + face care	+75.5%
matcha + face care	+86.4%
calendula + face care	+80.4%
adapalene + face care	+44.6%
evening primrose + face care	+28.9%
bakuchiol + face care	+175.9%

HAIR CARE

Sustained Ingredient	Growth
honey + hair care	+20.1%
aloe vera + hair care	+25.9%
avocado oil + hair care	+27.2%
hemp + hair care	+34.7%
fenugreek + hair care	+31.1%
moringa + hair care	+57.5%

BATH & BODY

Sustained Ingredient	Growth
salicylic acid + bath/body	+114.2%
turmeric + bath/body	+36.3%
babassu oil + bath/body	+21.4%
coconut water + bath/body	+20.8%
baobab + bath/body	+33.3%
niacinamide + bath/body	+132.3%

Source: Google Search data, year-over-year growth comparing the past 12 months ending August 2020 vs the 12 months prior (US).

INGREDIENTS SPOTLIGHT

CALENDULA

STATS:

19.9%

YEAR-OVER-YEAR
GROWTH

SPATE POV

Consumers are using this natural ingredient for a variety of concerns across a variety of product formats, showing calendula's diversity. Many brands such as April Skin and Kiehl's are already playing in this space, but the ingredient is showing strong growth in interest during lockdown — making it a promising trend for the next year or so.

HOW BIG IS THIS TREND

High Volume

111.6K average monthly searches

HOW COMPETITIVE IS THE SPACE?

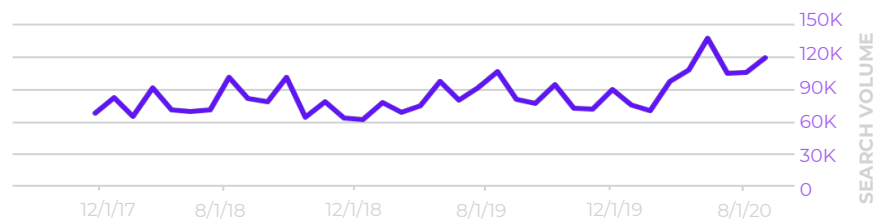
Very High Competition

15.4K average brand searches

WHO OWNS THE MARKET SHARE?

Few Market Leaders

3 market leaders



RELATED SEARCHES:

Product Format	Search Volume (Average monthly)
cream	20.4K
oil	11.4K
tea	3.3K
toner	2.7K
mask	2.6K
ointment	1.8K

Clean Beauty	Search Volume (Average monthly)
alcohol free	770
organic	230
natural	40
clean	30

Concerns	Search Volume (Average monthly)
eczema	1.1K
acne	420
rash	350
recall	140
scar	50

Benefits	Search Volume (Average monthly)
cleansing	880
foaming	740
hydrating	490
soothing	230
fresh	110



INGREDIENTS SPOTLIGHT

BAKUCHIOL

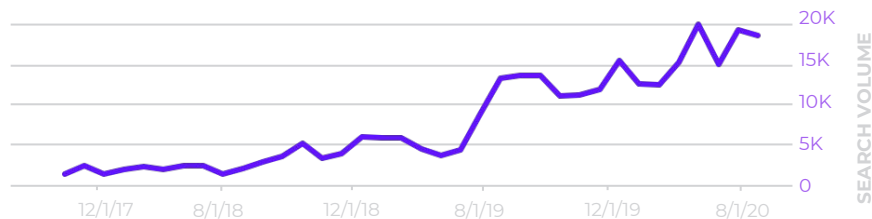
STATS:

145.8%

YEAR-OVER-YEAR
GROWTH

SPATE POV

Bakuchiol has graduated from rising star status to a sustained rising trend — which confirms the ingredient is not just a fad. While it isn't going to completely replace retinol any time soon, this gentler alternative has proven that consumers are interested in a natural substitute to retinol.



RELATED SEARCHES:

Questions	Search Volume (Average monthly)
products	710
vs	190
what is	140
before and after	90
effects	20

Product format	Search Volume (Average monthly)
serum	2K
extract	320
booster	220
oil	180
pad	110

Benefits	Search Volume (Average monthly)
smoothing	140
safe	120

Concerns	Search Volume (Average monthly)
pregnant	280
acne	250

HOW BIG IS THIS TREND

Low Volume
17.4K average monthly searches

HOW COMPETITIVE IS THE SPACE?

High Competition
1.6K average brand searches

WHO OWNS THE MARKET SHARE?

Few Market Leaders
2 market leaders

INGREDIENTS SPOTLIGHT

BINDII

STATS:

39.4%

YEAR-OVER-YEAR
GROWTH

SPATE POV

Also known as tribulus terrestris, bindii can be used to treat eczema, infertility, and more. Bindii is still mainly being searched as a supplement, which indicates that it could have strong potential in the beauty category. There are few brands in this space, leaving room for new and innovative uses of bindii.

HOW BIG IS THIS TREND

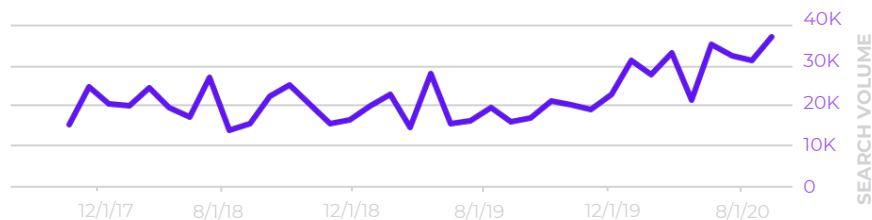
Medium Volume
30.2K average monthly searches

HOW COMPETITIVE IS THE SPACE?

Low Competition
110 average brand searches

WHO OWNS THE MARKET SHARE?

Very Few Market Leaders
1 market leaders



RELATED SEARCHES:

Product Format	Search Volume (Average monthly)
extract	2K
supplement	370
powder	250
pill	210
plant	140
tea	110

Questions	Search Volume (Average monthly)
dosage	390
side effects	390
what is	390

Retailers	Search Volume (Average monthly)
GNC	590
Amazon	390
Walmart	260
The Vitamin Shoppe	110

Purchases	Search Volume (Average monthly)
review	480
best	170

SPATE POV

How should beauty brands act on Sustained Rising trends?

If you don't yet have these ingredients in your portfolio (Product Innovation): Identify how your customer would most likely be interested in the ingredient. For ingredients like calendula, which concerns are most prevalent and which product formats align with current product lines? For ingredients like bakuchiol, explore how similar ingredients like retinol are used. If you want to get ahead, consider natural/gentle alternatives for other trending scientific ingredients, such as hyaluronic acid.

If you already have these ingredients in your portfolio (Marketing): Focus on concerns searched by consumers alongside these ingredients. Highlight products featuring these ingredients, and use claims that align with the benefits searched by consumers. Explore niche product formats to create a unique take on these ingredients.

Sustained risers are safe bets, but many new ingredients have been emerging this past year. Request access to the Spate Rising Star Ingredients report [here](#) for top growth ingredient trends.

Request a free custom
ingredient report today!

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