

# 2019 TREND: SUB-ZERO WASTE

A whole new dawn is fast approaching for beauty and personal care brands.



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## Why you MUST act on this now

### What is the trend?

**If brands don't change their approach now, they won't exist in the future.** Beauty & Personal Care (BPC) businesses must switch to a whole new paradigm in terms of sustainability and zero-waste. Some companies are already discussing totally circumventing packaging. **This is not just a trend, it is a movement.**

### What you should do about it

Gaining first-mover advantage is key. **Those who put current profits ahead of investment in zero-waste solutions will lose out in the long term.** Indie brands already have an edge, as they have built their business practices around this. High-profit BPC brands that aren't investing in this are already condemning themselves.

### Lead the movement

**Being sustainable doesn't mean compromising on quality or luxury.** Innovate and be clever with upcycling concepts, refills and product-life extensions. Be transparent to create a better relationship with consumers, and provide them with the guidance and education to make changes.



# WHAT IS THE TREND?

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## Your customers demand action

This is not just a trend; it's a movement towards a groundbreaking new archetype for the industry. Some BPC companies are already discussing completely removing packaging from the equation. **If brands don't change their approach now, they will become insignificant.**

First-mover advantage is key to success, and **those who place current profits ahead of making the necessary investment in zero-waste will not be around in the future.**

Native brands already have the upper hand as they built their business practices around this. Larger brands who are moving as slow as oil tankers need to think about becoming speedboats to catch up with smaller, nimbler competitors.

Your customers are paying a lot more attention to their impact on the planet, and **climate change calls are more drastic. A bigger-picture focus is needed throughout the whole BPC industry supply chain for a true zero-waste mentality.**

## It's the dawn of a total lifestyle shift

As waste reduction becomes more evident in day-to-day lives, more global consumers will scrutinise their beauty routines.

### IN THE US

**44%**

of **natural and organic personal care consumers** who buy a mix of mainstream and natural/organic brands agree they **live sustainably**

### IN BRAZIL

**54%**

of **consumers** who are potential buyers of green/ethical products agree that they **don't like to waste**

### IN SPAIN

**74%**

of **BPC consumers** are **concerned** that the ingredients used in natural products are not sustainable

**Base:** 2,000 US internet users aged 18+; 1,310 Brazilian internet users aged 16+ who are potential buyers of green/ethical products; 1,974 Spanish internet users aged 16+ who have bought beauty and personal care products in the last six months

**Source:** Lightspeed/Mintel

As waste reduction becomes more evident in day-to-day lives, more global consumers will scrutinise their beauty routines.



**Base:** \* China's affluent class; 3,000 Chinese internet users aged 18+; 3,000 Indian adults aged 18+  
**Source:** KuRunData/Mintel; Ipsos Observer/Mintel; \* China Ministry of Housing and Urban-Rural Development

## Refilling, repurposing, recycling and reinventing

### Sustainability is in the spotlight

More people are questioning brands on their eco-ethical practices **yet efforts to change are still limited, which means there is still an opportunity to make money.** A quick fix won't do; brands need a long-term strategy that considers every element of the supply chain – just one weak link could undermine all of their good intentions.

### 'Fast beauty' is slowing

BPC consumers are seeking more straightforward, **simple beauty routines**, and there will be a backlash against brands that purposely create limited shelf life products, or encourage over consumption. There is **scope to create products that can be reinvented, not replaced**, and new formats and packs to help them last longer or transform.

### There are new demands on brands

Brands must be more environmentally responsible and must be transparent about their practices, but consumers must also take some accountability in this. Many people want to help, but aren't sure how, so **brands can win loyalty using education and by offering simple solutions.** These provide a feel-good factor and save money and time.

# WHAT YOU SHOULD DO ABOUT IT

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## The primary pledges



REN has pledged to be a zero waste brand by 2021

Native brands such as [Ethique Beauty](#), [Lamazuna](#), [LOLI Beauty](#) and [Seed Phytonutrients](#) have built business on environmental policies. These smaller companies can be more aggressive and have a stronger viewpoint. Bigger brands need to get ahead of this conversation and be part of movement.

Adopters Unilever and L'Oréal have both pledged to use 100% recyclable, reusable and compostable plastic by 2025; Procter & Gamble has committed to introducing 25% recycled plastic across 500 million bottles of haircare this year, while Avon has already achieved 95% of its goal to send zero waste to landfill.

This affects all corners of the world: in 2018, China banned 24 types of imported waste and stopped accepting items that had previously been sent there for disposal.

Consumers still expect brands to take responsibility for their waste, and will be attracted to those who facilitate the process for them.

## Listen carefully to why your customers want a zero-waste lifestyle

It's top of the news agenda: your customers may have:

- ✓ Seen 'Trash Islands'
- ✓ Seen tsunamis, floods and hurricanes decimating communities
- ✓ Seen wildlife injured by plastic waste/pollution
- ✓ Seen icebergs melting
- ✓ Seen that water is a dwindling resource

It saves money: people are reducing the cost of living, they grow their own food, use reusable containers and make their own products.

It is healthier: some are seeking out natural solutions due to 'scare stories' they read about certain chemicals.





**It inspires others:** as more people make the move to zero waste, their efforts will inspire others to follow; particularly as not recycling or taking disposable cups become a social faux pas.

**It lets them make a difference:** consumers don't think of it as an 'all-or-nothing' decision. They are taking their own steps to reduce waste, such as using reusable shopping bags/refillable water bottles, and this progresses into a more environmentally-conscious lifestyle.



La Bouche Rouge packaging is designed to be refilled and kept for life

## Innovate...and be part of the movement

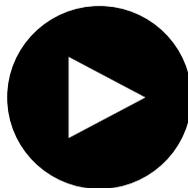
As the new dawn for zero-waste and sustainability becomes more fashionable, brands that do not address it will become repellent to the growing ethical consumer group.

**Your customers will also respond better to you if you are at the head of the conversation and at the forefront of innovation for this movement.** Be a driving force: take big steps and share your passion to change the world – just like car manufacturers have done by going electric.

Indie brands have benefited from coming-of-age at a time where sustainability's importance is pivotal, and have built their business practices around it, **now established brands must take the lead.**

## Explain WHY and HOW to recycle products after use

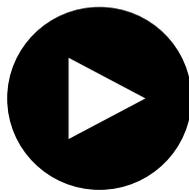
Garnier partnered with TerraCycle and DoSomething.org in the US to highlight the importance of beauty recycling.



<https://clients.mintel.com/report/2019-trend-sub-zero-waste/13>



How fast is this happening in your region?



<https://clients.mintel.com/report/2019-trend-sub-zero-waste/14>



# LEAD THE MOVEMENT

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## Be clever: make it seamless

### Innovate for a 'waste-free' routine

In 2019, consumers will continue to focus on considerably packaged products, but **will also be drawn to brands that place wider focus on reducing waste**. Creating new 'end purpose' packaging concepts, ancillary products for storing and transporting zero-packaged products, as well as adding 'waste-free' beauty treatments will appeal.

### Support with education and initiatives

Brands must fully educate customers on the part they play within the zero-waste concept. **Assist consumers post-purchase: informing on packaging disposal and offering upcycling schemes**. The pop-up retail model will also need to transform away from its current disposable image.

### Offer supply chain security

Advancing **technologies such as blockchain will allow consumers to scrutinise the entire manufacturing process**, bringing a 'nose-to-tail' approach to ingredients. Inspiration can be taken from emerging markets that have a cultural aversion to waste. Modernising retail models will allow stock control to streamline waste.



Think long term and consider the whole supply chain

## Pioneer 'clever luxury' – but avoid the next backlash

As a spotlight is currently being shone on the fast-fashion industry, there is a movement towards circularity – allowing products/materials to be recovered, regenerated and reused, rather than being disposed of.

BPC brands should be inspired by this, but must **ensure the processes used to create refillable, reusable or repurposed products won't end up being more toxic for the environment in the long term**.

When devising alternative solutions, consider every part of the supply chain from an ethical and environmental standpoint.

Overall, the zero-waste concept is at odds with the traditional luxurious image of the beauty industry, especially for prestige brands, so this calls for a whole new definition of 'luxury'.



Glambot upcycling initiative

## A white space for upcycling

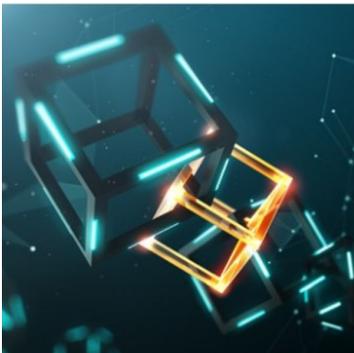
Glambot offers consumers a space to buy and sell used cosmetics – **verifying and sterilising** products. But **very few BPC brands currently offer customers the chance to upcycle their products, so there is white space here.**

BPC brands that offer refills need to maintain post-sale contact with customers, and provide information about how their new solutions are reducing waste. Implementing a returns scheme, allowing customers to return packaging they do not wish to refill, and exploring refurbished cosmetics in returned packaging at a reduced cost can ensure sustainability goals are met.

## Examples out there now

### New actives sourced from throwaways

Ogilvy Paris x Etat Libre d'Orange **I AM TRASH** helps consumers visualise waste in new ways. As more products with waste-derived actives make it to market, consumers will become more focussed on complete supply chain sustainability.



### Blockchain growth will publicise lifecycle

Consumers also demand knowledge of a product's creation. Beauty companies can leverage **blockchain** and **crypto-anchor technology** to validate a product journey from source to skin, while also combating the issue of counterfeit products.

### New retail brings new flexibility

As pop-up stores are a continuing retail trend, brands need to ensure these **settings are created/removed in an environmentally responsible way.** Use projection instead of printing, and adapt to rather than change a current space.





### Extend a product's life

[Gotha Second Chance Mascara Drops](#) extends the life of any mascara, refreshing a drying formula. Made from 98% natural ingredients, the product aims to reduce plastic consumption by preventing the need to discard mascaras so often.

### Repair, don't waste

[Moon Mousse Magic Makeup Repair Kit](#) offers a solution for broken or cracked palettes, repairing to reduce waste. Suitable for multiple products, including eyeshadows, bronzers, blushers and highlighters, and has a patent-pending formula.



### Packaging can have an after-use

[Miller Harris Forage Fragrances](#) are presented in a recycled plastic tray not a traditional box – designed to be repurposed for storing jewellery or small items. Packaging can focus on an end-purpose, rather than simply housing a product.



## Meet the expert

### Andrew McDougall

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Andrew is an award-winning beauty & personal care analyst with over ten years' experience of researching and writing about the cosmetics industry. Previously Editor of the Cosmetics Design brand he has travelled the world to cover key markets, interviewed top industry figures and presented at key industry conferences.

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