Setting the foundations for a sustainable beauty and cosmetics industry

Aligning product quality with environmental and social goals

Whitepaper

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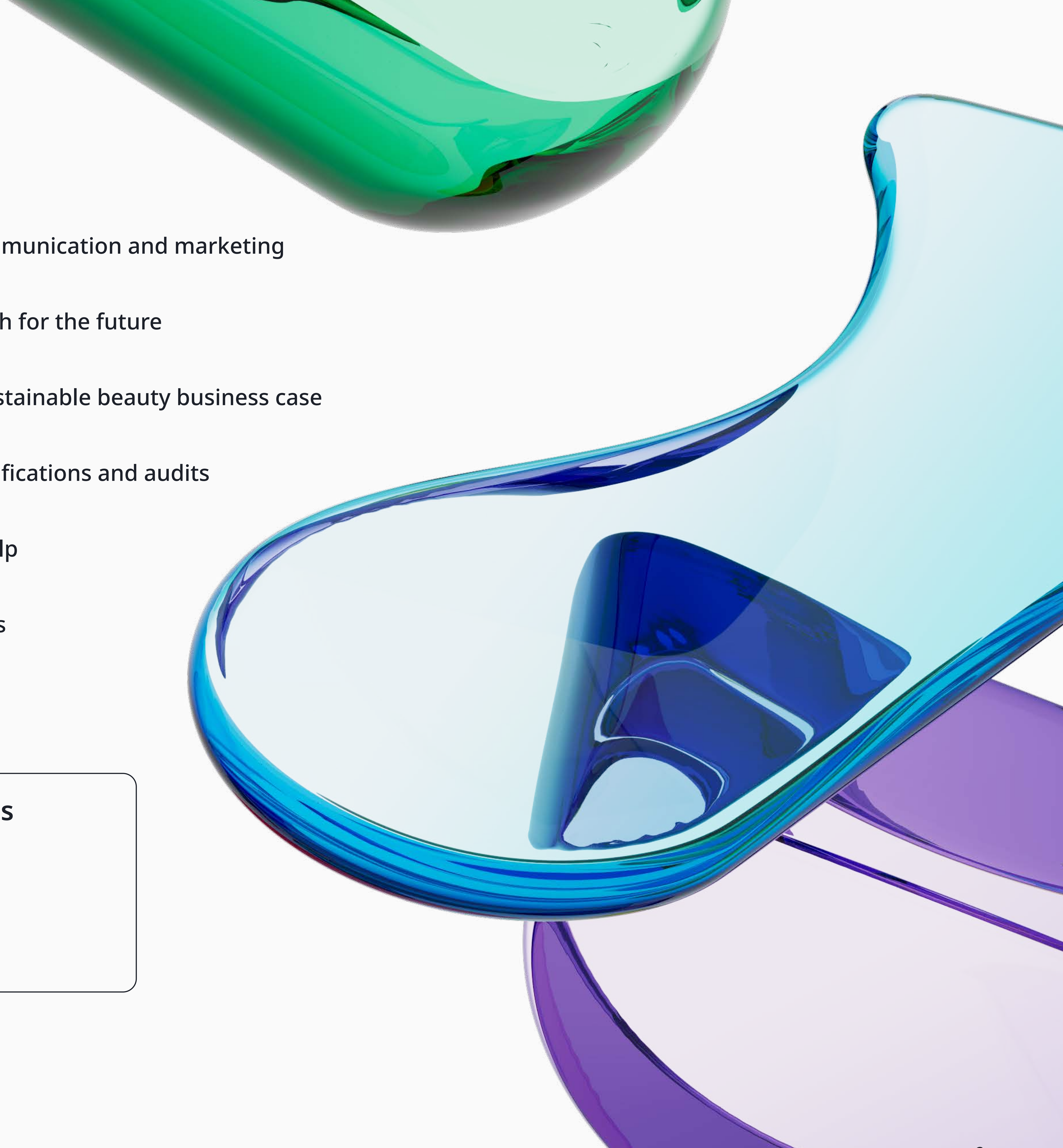


Foreword

The $450 billion global beauty industry, once unstoppable with 7 percent annual growth from 2022 to 2024, stands at a pivotal moment as it faces escalating expectations from consumers, regulators, and environmental advocates alike. With complex, global supply chains stretching from raw material sourcing to packaging, the industry must align with evolving sustainability goals while safeguarding product quality and safety.

(Source: State of Beauty industry trends 2025 | McKinsey)

As sector specialists, our combined expertise in supply chain mapping, traceability, innovation, and circular economy equips organizations to move decisively from compliance to leadership. The journey toward responsible beauty is complex; stretching from raw material sourcing and ingredient selection to ethical packaging and meaningful brand storytelling. Today's risks are rising: environmental impact, chemical management, and social responsibility increasingly intersect with reputational and financial consequences.

This whitepaper, authored by Amy Nguyen, brings together actionable insights from leading experts, real-world examples, and best practice guidance to illuminate both the risks and opportunities on the path ahead. At BSI, we believe beauty's future belongs to organizations that unite performance and purpose, leveraging internationally recognized standards and tailored consulting to embed resilience and trust throughout the value chain.

As you explore these pages, we invite you to see BSI as your trusted partner for sustainable, ethical, and credible growth. Navigating this new landscape takes more than compliance; it takes vision, collaboration, and a commitment to being better, for people, planet, and industry alike.

Todd Redwood
Global Managing Director – Consumer, Retail and Food, BSI

Amy Nguyen
Consultant

1. Introduction

The beauty and cosmetics sector stands at a pivotal moment as it faces escalating expectations from consumers, regulators, and environmental advocates alike. With complex, global supply chains stretching from raw material sourcing to packaging, the industry must align with evolving sustainability goals while safeguarding product quality and safety.

In this rapidly shifting landscape, risks are growing—from environmental impacts and chemical management to social responsibility and regulatory compliance. Failure to adapt poses significant operational, reputational, and financial consequences.

BSI helps brands meet these challenges head-on. Through our internationally recognized standards, rigorous certification, tailored audits, and strategic consulting, we empower companies to embed sustainability and ethical practices deeply into their supply chains.

Our expertise in supply chain mapping, traceability, innovation, and circular economy principles enables organizations to not only comply but lead with transparency and credibility.

This whitepaper explores the critical environmental, social, and regulatory issues shaping the future of beauty, highlighting both the opportunities and risks facing industry leaders. With insights from sector experts and a spotlight on best practice, it demonstrates how BSI's comprehensive solutions provide the foundation for resilient, compliant, and sustainable growth.

The future belongs to beauty brands that prioritize performance and purpose—with BSI as the trusted partner to help you get there.

"We look closely at our clients and work with them on the challenges they face. If an organisation has a need, we can adapt solutions or develop them from scratch. That could mean writing a new standard or creating a new assurance solution that can be certified. We help to join the pieces of the puzzle to substantiate claims."

Todd Redwood: Global Managing Director – Consumer, Retail and Food, BSI

2. Executive Summary

The global beauty and cosmetics sector stands at a critical juncture. Valued at $441 billion in 2024 and projected to grow at 3.37% annually through to 2030, the industry is expanding against a backdrop of economic uncertainty, shifting consumer expectations, regulatory tightening, and environmental and social challenges. Beauty brands are being called to align product excellence with credible sustainability performance. Those that succeed will not only future-proof their businesses but lead in shaping a sector where transparency, innovation and inclusivity are non-negotiable.

A Market in Flux

The sector's growth masks complex structural pressures. Inflation and supply chain disruptions have driven ingredient price volatility and longer lead times. Regulatory frameworks, from the EU CSRD, CSDDD and Extended Producer Responsibility schemes to California's Toxic Free Cosmetics Act, are reshaping operational requirements. Meanwhile, geopolitical developments are influencing sourcing strategies and accelerating the push for traceable, ethical and low-impact ingredients. Natural cosmetics alone are forecast to grow from $642 million in 2022 to over $1 billion by 2030, underscoring consumer appetite for sustainable products.

85% trust independent verifiers above other sources

Evolving Consumer Expectations

Across categories, product quality remains paramount, but sustainability is now integral to value perception. Consumers increasingly scrutinise ingredients, with almost a quarter of higher-spending shoppers actively checking formulations, and 63% rating "clean beauty" as extremely or very important. Certifications play a decisive role: 73% of consumers are more likely to buy a certified product, and 85% trust independent verifiers above other sources. Digital platforms like TikTok have rapidly become influential retail and information spaces, amplifying both consumer expectations and reputational risks.

73% of consumers are more likely to buy a certified product

Environmental Impacts and Opportunities

To address environmental impacts, action across the supply chain is accelerating, with raw materials, manufacturing and packaging emerging as critical levers for impact.

Key focus areas include:

Raw materials:

Ethical sourcing and traceability for ingredients like mica, palm oil, vanilla and PFAs are under scrutiny. Industry-wide initiatives and certification schemes are supporting improved practices.

Manufacturing:

Regulatory shifts such as the EU's cosmetics regulation and the US Modernisation of Cosmetics Regulation Act are driving stronger chemical management. Leading companies are setting ambitious targets, for example, aiming for 95% bio-based ingredients by 2030. Energy and water efficiency, biodiversity protection and regenerative agriculture are increasingly integrated into operational strategies.

Packaging:

Regulation is pushing towards circularity, including the EU Packaging and Packaging Waste Directive and California's SB 54 (Plastic Pollution Prevention and Packaging Producer Responsibility Act), which aims for 25% reductions in single-use plastics by 2032. Brands are investing in refill systems, recycled carbon-based materials and bio-innovations to reduce environmental footprints. Conversations with innovators LanzaTech and Xampla highlight the possibilities.

Circularity, Innovation and AI

Circular economy principles such as eliminating waste, circulating materials, and regenerating nature are gaining momentum. Innovation spans ingredient upcycling, refillable packaging and material science breakthroughs, such as packaging made from captured carbon or mycelium-based alternatives.

AI is emerging as a transformative force across formulation, production and personalisation, with the market expected to grow from $3.7 billion in 2024 to $4.4 billion in 2025. Brands are using AI to optimise manufacturing, tailor consumer experiences, as reduce waste, while governance frameworks are needed to ensure transparency and responsible use of data.

Social Conditions and Responsible Marketing

Social considerations within sustainability are also high on the agenda. Worker health and safety, as well as human rights due diligence, are moving to the fore. Supply chains for natural ingredients often involve vulnerable communities; traceability, fair purchasing practices, and investment in supplier improvement are essential.

Elsewhere, marketing is under growing regulatory and consumer scrutiny. While 15% of shoppers now consider sustainability information more important than price, nearly two-thirds remain unclear about what “green” claims mean. Regulatory initiatives like the UK’s Green Claims Code and the forthcoming EU Green Claims Directive are raising the bar for truthful, evidence-based communication. Inclusivity is also being reframed as a sustainability imperative, with leading brands broadening representation across products, advertising and access.

A Path Forward

The future of sustainable beauty and cosmetics will be defined by collaboration, innovation and accountability. To meet rising expectations and regulatory demands, companies must:

- **Adopt robust standards** and map supply chains beyond Tier 1 to address environmental and social risks at scale.
- **Invest in safer, traceable ingredients** and technologies that drive measurable impact.
- **Strengthen supplier partnerships** and adopt regenerative approaches to build long-term resilience.
- **Leverage certifications and audits** to substantiate claims and build consumer trust.
- **Embrace innovation and inclusivity**, ensuring that sustainability strategies reflect both planetary and social priorities.

By setting clear standards, leveraging technology, and engaging transparently with stakeholders, the sector can build a more resilient, competitive and equitable future. BSI stands ready to support beauty and cosmetics companies on this journey, moving beyond compliance to leadership in a rapidly changing world.

3. An overview of the market

The current state of the beauty and cosmetics industry presents a unique picture, with the increasing complexity of supply chains driven by macro-economic conditions and geopolitical uncertainty, alongside regulatory pressures. Shifting consumer preferences and a higher level of scrutiny mean that shoppers are prioritising high product quality and provenance centred around sustainability and ethical sourcing.

According to McKinsey and Business of Fashion, the global beauty industry generated sales of $441 billion in 2024, of which skincare comprised 41% of sales and cosmetics 19%. More broadly, the beauty and personal care market is expected to experience an annual growth rate of 3.37% across the next five years, until 2030[1], with promising growth prospects in geographies in the Middle East, India and APAC[2].

Specific segments of the market are reported to have driven some of this growth. For instance, natural cosmetics continue to grow from strength to strength. Valued at $642 million in 2022, that natural cosmetics market is projected to reach $1095 million by 2030[3]. The Social Association reported that retail sales of organic beauty products in the UK surged from $38.9 million in 2012 to $182.94 million in 2022[4].

This boom is notable at a time when the industry is grappling with the implications of inflation, with rising costs of raw materials, supply chain delays slowing down manufacturing and creating longer lead times for key ingredients such as oils and alcohols like citric acid and glycerin. The availability of natural ingredients is also at risk as sourcing regions are impacted by changing climates and weather events[5].

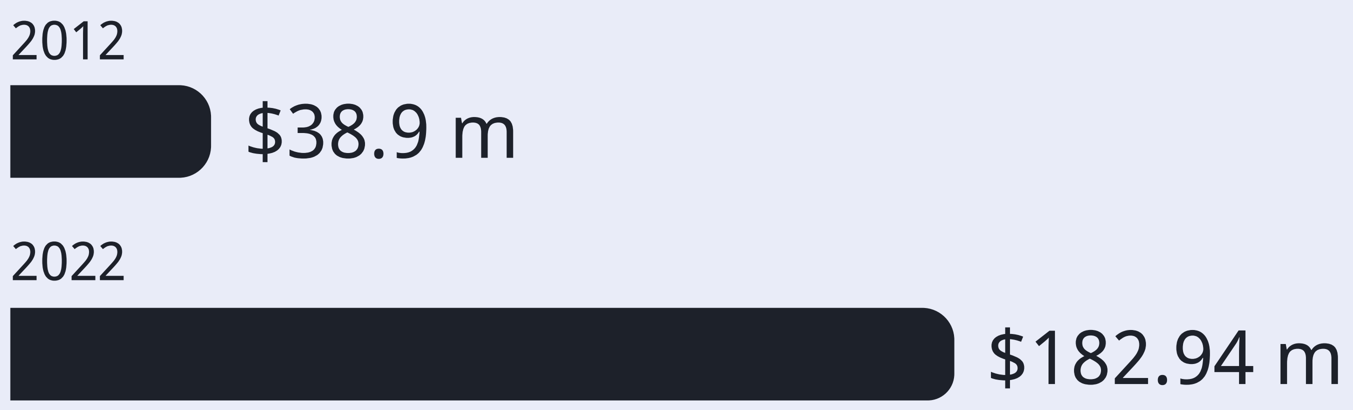
Inflation is impacting consumers, as well as businesses. The European Commission's 2025 Consumer Conditions Scoreboard reported the strain of the cost-of-living crisis, with one third of consumers expressing concerns about their ability to pay bills and afford essentials[6].

The lipstick index, once known for shoppers leaning towards affordable luxury products like lipstick during economic downturns, has also been reported to have contracted[7]. This is being noted in boardrooms as 54% of executives in a recent survey identified uncertain consumer appetite or restricted spending[8].

41% of beauty industry generated sales are comprised of skincare products

19% of beauty industry generated sales are comprised of cosmetic products

Reported retail sales of organic beauty products in the UK



Geopolitical developments and disrupted trade flows are adding to the complexity of global supply chain operations as tariffs have driven brands to reconsider sourcing strategies. For instance, driving ingredient substitutions, nearshoring and simplification where possible. Some of the industry's largest players including L'Oreal, Estée Lauder, and Shiseido communicated to investors that lower growth, product price increases, and sourcing and manufacturing changes will come as a result[9].

Elsewhere, regulatory developments continue to shape the industry's approach to sustainability at every stage of the product life cycle. Highlights include the EU Extended Producer Responsibility, EU Green Claims Directive and California's Toxic Free Cosmetics Act (AB2762), plus reporting regulations including the EU Corporate Sustainability Reporting Directive and Corporate Sustainability Due Diligence Directive. Whilst certain policies have been diluted, heightened focus on packaging, environmental impacts, chemicals and ingredient transparency and safety remains.

Investors and shareholders are vocal in their desire to see organisations that focus on profitability, but also community, innovation, diversity and science-backed claims[10]. This presents an opportunity for the wider adoption of robust audit systems and standards to validate claims across the beauty and cosmetic supply chain.

4. Consumer trends

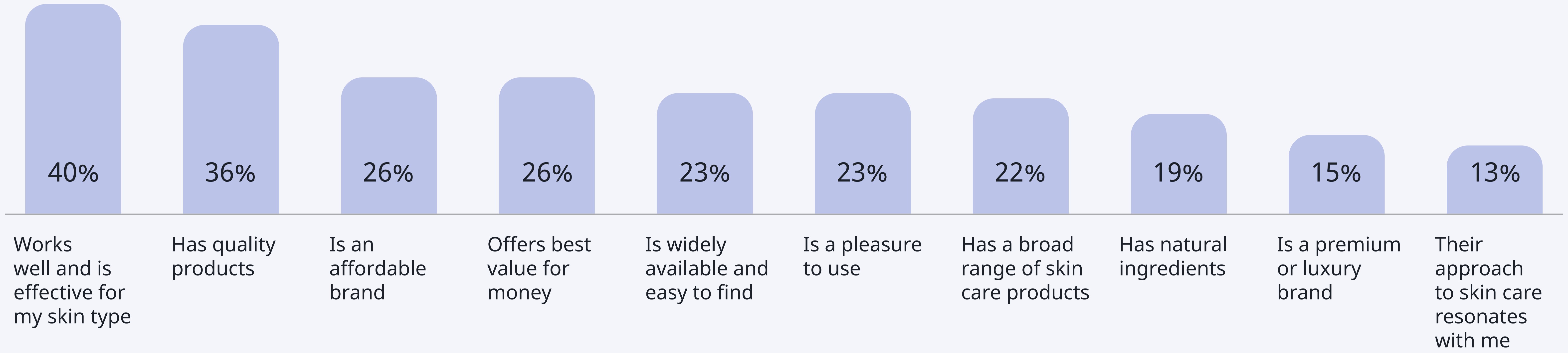
In addition to regulatory developments, economic conditions and increased supply chain complexities, demands and preferences of consumers across the world are redefining how brands and the ecosystem of the organisations they work with operate.

Product quality remains paramount in the eyes of customers in the beauty and cosmetics industry. This is particularly true for skincare and colour cosmetics categories, according to research from McKinsey and Business of Fashion[11]. In fact, the authors report that 75% of executives expect consumer scrutiny on value to be the biggest theme shaping the industry in the near future.

Consumers prioritize product quality across category purchases

Top 10 attributes influencing brand purchase, % of respondents

Skin care



Colour cosmetics

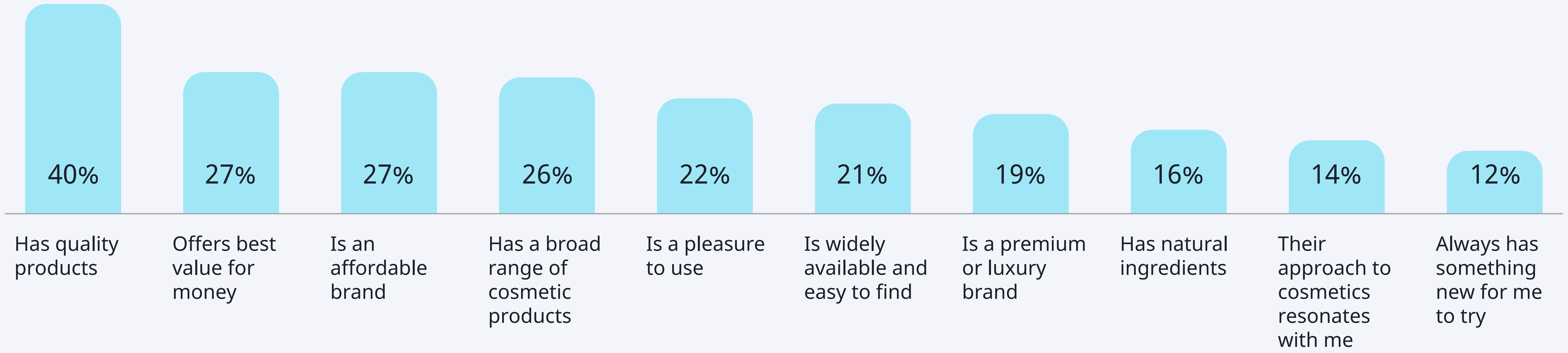


Illustration representing findings from McKinsey and Business of Fashion (11).

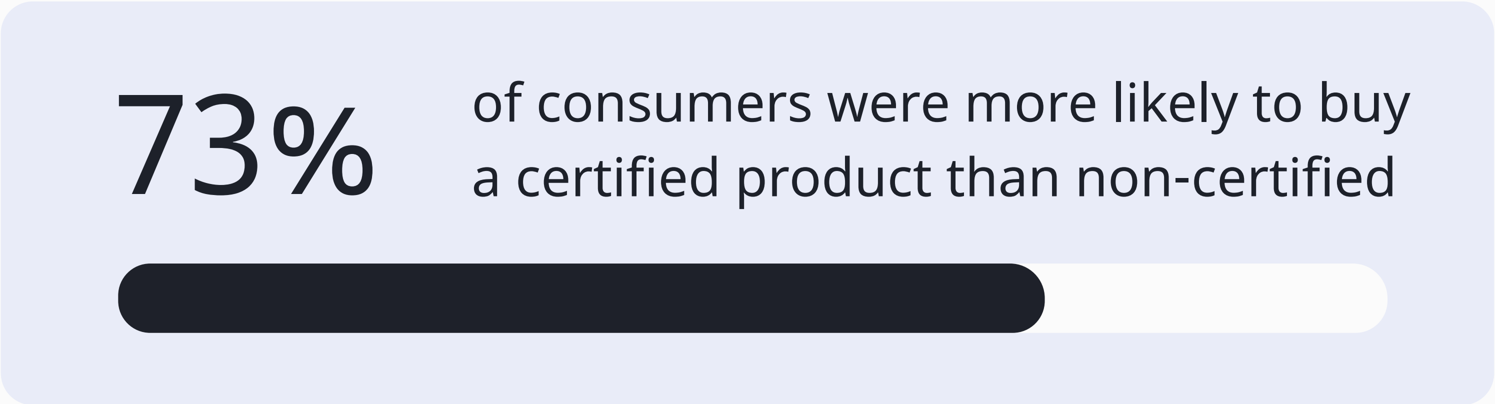
Similarly, a survey by YouGov in early 2025 noted that for higher spending customers, almost a quarter stated that they pay attention to ingredients in products used[12]. This underpins the important role of traceability and verification on ingredients across the supply chain. Especially as consumers have increased access to information online and are influenced about beauty purchases through social media channels like TikTok – a channel that now ranks as the UK's fourth-largest beauty retailer, behind Amazon, Boots and LookFantastic[13].

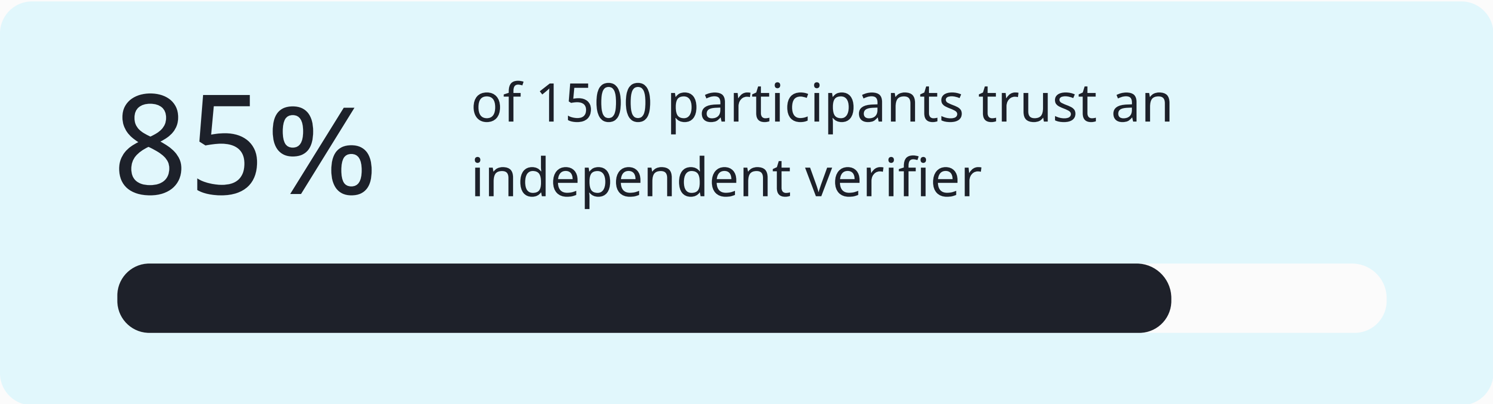
Demand for clean, natural and 'free-from' beauty is driving a move away from products that contain parabens, sulphates, phthalates, artificial colours and fragrances[14]. Clean Hub's beauty survey revealed that 63% of consumers believed that clean beauty is 'extremely or very important' when buying cosmetics[15].

There is an interest and shift towards sustainable products and brands, particularly when it comes to natural ingredients and packaging options[16] too. There is expressed care for social and environmental responsibility. The Union for Ethical BioTrade spoke with over 74,000 people in 16 countries and found that 82% of consumers believe companies have a moral obligation to behave responsibly towards people and biodiversity[17].

This is particularly true for certain regions. BCG recorded that the adoption of sustainable behaviours around skincare are high in India, China, Italy and France[18]. The consulting firm does outline that the say-do gap exists when it comes to purchasing behaviour, noting that while 71% of respondents to a survey express concerns around sustainability, a mere 4% would be willing to pay a premium[19].

Building a strong foundation of trust with consumers remains critical. Certifications have been identified in playing an important role to support this. For instance, research with shoppers from countries including France, South Korea and the US found that 73% were more likely to buy a certified product than non-certified[20]. The Provenance Skin Deep Beauty Report discovered that 85% of 1500 participants trust an independent verifier, putting this source of information ahead of others[21].





5. Impacts and opportunities

Across the beauty and cosmetic industry supply chain, a vast array of opportunities exist to accelerate sustainability efforts, driving meaningful impact on environmental and social areas whilst also meeting the high efficacious product quality standards demanded by consumers.

The following chapter explores what ambitious action looks like, spotlighting best practice examples across raw material procurement, packaging and responsible marketing. For manufacturing, it evaluates key considerations for mitigating the industry's significant chemical and environmental footprint. Plus, a closer inspection of circular practices and innovations in biotechnology and green chemistry that are pushing the boundaries.

"When an ingredient or supply chain is determined to be in a high risk condition, companies need to engage more deeply in that ingredient's supply chain, or in the sector for sector-level risks. Some companies act on specific ingredients through action plans in the supply chain or landscape-level projects. Great examples include companies supporting a biodiversity action plan for an ingredient with their local supplier where they set specific goals and targets and monitor them locally. Or instances where a group of companies work on pre-competitive collective action to mitigate social or environmental risks and promote positive impacts in an ingredient-specific working group."

Rik Kutsch Lojenga – Executive Director, UEBT

"

Lush's approach to makeup formulations is rooted in its core commitment to integrity across sourcing, environmental impact, and animal welfare. The brand prioritises high-quality, safe ingredients, favouring natural materials like whole fruits and vegetables, and seeking direct relationships with producers who share their ethical values. Lush is also a pioneer in self-preserving formulations, minimising or eliminating synthetic preservatives in its products. While championing natural ingredients, Lush thoughtfully incorporates synthetics where ethical sourcing is otherwise challenging, such as using responsibly sourced synthetic mica to ensure transparency and prevent child labour."

Lush Beauty Buying Team

5.1 Raw materials

One of the first steps in achieving sustainability in product development is to focus on the sourcing of raw materials. By opting for ethically sourced, organic, or renewable ingredients, cosmetics brands can ensure that they are contributing to biodiversity preservation, reducing carbon footprints, and supporting local communities. Importantly, these ingredients must also meet high-quality standards to ensure that the final product is effective, safe, and performs as expected.

Certain common ingredients used in products are associated with higher environmental and sourcing risks than others.

Mica

Used in cosmetic products such as highlighter, eyeshadow and lipsticks, Mica is popular for its shimmer properties. Commonly mined in countries such as Brazil, China, Madagascar, Sri Lanka and India, incidences of child labour and unsafe working conditions have been reported[22].

Mining mica has environmental consequences too, when not conducted responsibly as it can impact microalgae and aquatic plants when washed into water streams[23].

To remedy this, the industry has convened under the Responsible Mica Initiative in response to these issues, to better address the challenges of sourcing this ingredient.

Palm oil

Palm oil is commonly used for emulsifiers, emollients, texturizers. When not produced responsibly, it can represent a risk hot spot for organisations, with historic links to deforestation, habitat loss and land use changes, plus socio-economic implications for indigenous communities and smallholder farmers[24].

The Roundtable on Sustainable Palm Oil certification provides assurance to ensure production is environmentally and socially sustainable. Weleda uses organic palm oil, certified to the highest RSPO level but also has partners with non-profit organisation Borneo Orangutan Survival (BOS), to support conservation work in the area[25]. Additionally, Estée Lauder aims that by the end of 2025, at least 95% of its palm-based ingredients will be certified sustainable from RSPO physical supply chains as part of its No Deforestation, No Peat, No Exploitation policy[26].

Vanilla

Whether it's in lipsticks, lotions, perfumes or hair care, vanilla is another ingredient that poses certain risks for organisations when not fully traced back to source.

Vanilla is often sourced from Uganda, Madagascar, Papa New Guinea and New Zealand with a low level of supply chain transparency, and certain reports cite that farmers have been locked into exploitation, poverty and child labour[27].

With rising awareness, proactive organisations are working to remedy these risks. For example, for a lip gloss product, Beautycounter partnered directly with smallholder farmers in Madagascar for sourcing and worked with Fairtrade America, Rainforest Alliance and UEBT to reinforce standards[28]. Haircare brand Aveda also launched a blockchain traceability pilot with Biovanilla in Madagascar to secure real time tracking of vanilla from farmer to product label. This covered over 125 products by 2021[29].

PFAs (Per- and polyfluoroalkyl substances)

Found in long-wear cosmetics such as mascaras, foundations and lipsticks, PFAs are known as forever chemicals which represent health and environmental risks.

1/2 A scientific study of over 230 products in 2021 identified significant levels of PFAs in almost half of all products[30 31].

To tackle this, the industry approach has been to remove PFAs entirely, conduct independent testing and enhance supplier oversight through audits. For example, L'Oreal began phasing out PFAs in 2018 with the goal to eliminate this across its portfolio by 2024[32].

Remedying the use of PFAs is particularly important for organisations operating in Europe, specifically France, which passed a new law that will ban PFAs in several products including cosmetics which will come into force in 2026[33].

5.2 Manufacturing

Managing and mitigating chemical footprints

As sustainability efforts intensify, there's a growing demand for cosmetics products that are free from harmful chemicals, such as silicones, parabens, sulphates, and phthalates. This includes the implications of PFAs as forever chemicals, previously mentioned.

To meet this demand, brands must ensure that their formulations are compliant with health and safety product standards and minimise the use of dangerous chemicals. A recent survey by the National Sanitation Foundation (NSF), a respected public health and safety organisation, found that 74% of consumers consider organic ingredients important in personal care products.

65% Meanwhile, 65% of consumers want a clear ingredient list to identify potentially harmful ingredients[34].

Regulation, particularly in Europe and the US has played an important role in driving the industry's approach to manage and mitigate its chemical footprint, especially when it comes to ingredient safety, toxicity and transparency. For instance, the EU's Cosmetic Regulation No 1223/2009 bans or restricts the use of over 1600 substances such as parabens in cosmetic products and requires a Cosmetic Product Safety Report (CSPR) on toxicological profiles of ingredients[35].

Elsewhere, the Modernization of Cosmetics Regulation Act (MoCRA) passed in 2022 requires brands to register products and facilities, report adverse events linked to chemicals and disclose fragrance allergens as well as safety substantiation for ingredients[36].

California's Toxic Free Chemicals Act became the first example of a state banning specific ingredients. It prohibits 24 chemicals from cosmetics sold in California including mercury, formaldehyde, and PFAs[37].

At a manufacturing level, policies exist to reduce toxic waste include China's Cosmetic Supervision and Administration Regulation and the EU's REACH (Registration, Evaluation, Authorisation and Restriction of Chemicals).

Such policies are shifting chemical management from a voluntary to a compliance-driven approach, spurring companies to set stricter internal standards. For example, L'Oreal devised a Green Sciences Strategy[38] – targeting 95% bio-based, mineral or abundant natural origin ingredients by 2030 and Estée Lauder has an Internal Chemicals Policy and Green Chemicals Assessment Tool[39]. Shiseido has a Safety Assurance System, including screening for bioaccumulation, aquatic toxicity, and endocrine activity[40].

95% L'Oreal devised a Green Sciences Strategy – targeting 95% bio-based, mineral or abundant natural origin ingredients by 2030

Managing and mitigating environmental footprints

Sustainable manufacturing processes are essential for beauty and cosmetics companies looking to reduce their environmental impact across the sourcing regions where they operate be that in relation to carbon, water and biodiversity.

Carbon

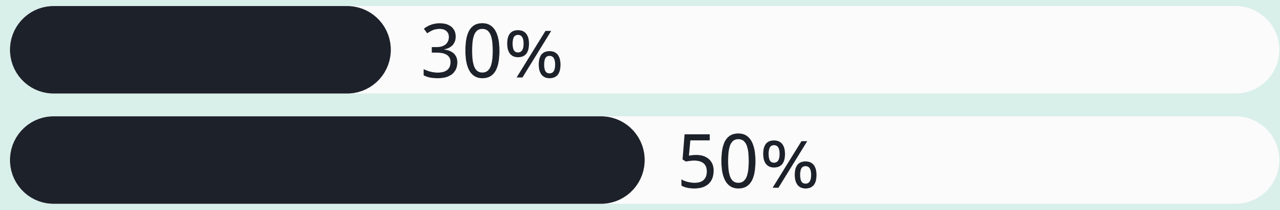
With greenhouse gas emission reduction targets in place for some of the industry's bigger players, implementing energy efficient technologies and adopting renewable energy is being paired with strategies that review carbon hotspots in product formulation and packaging too.

Smart renewable energy procurement has been deployed by Estée Lauder to help move towards its Science Based Targets and align with the 2015 Paris Agreement. It engaged in a Virtual Power Purchase Agreement in 2020 to generate wind power in the US[41].

Chinese beauty brand Florasis recently made headlines for its smart factory, built in Hangzhou that uses AI and robotics to optimise energy efficiency as well as on-site rooftop solar installation to reduce its dependency on fossil fuels[42].

Collaboration with suppliers is also paramount to reduce Scope 3 carbon emissions. Estée Lauder communicates that it has partnered with its top 20 third party manufacturers to support them through engagement and provision of resources on a broad array of sustainability topics. This includes energy efficiency and greenhouse gas emissions reduction. The company reported that in 2024, 80% of this cohort now use renewable energy, an increase from 65% in 2023.

Scope 3 emissions in the beauty manufacturing sector represent a substantial portion of the industry's overall carbon footprint. They account for approximately 30 to 50 percent of total emissions in the beauty and personal care sector, with ingredient sourcing being a major contributor.



(Source: The Carbon Cost of Cosmetics: A Guide To Reducing Scope 3 Emissions | Karbon-X Blog)

There is an opportunity for the beauty and cosmetic industry to borrow lessons from across sectors when it comes to decarbonizing upstream supply chain operations. For example, through programmes facilitated by the fashion industry's Apparel Impact Institute, brands are supporting their suppliers through collective financing, training, provision of resources, as well as funding feasibility studies for solar and heat pumps on manufacturing sites[43].

Water

Many formulations in the manufacturing process depend on water-intensive ingredients. For cosmetics, water is often referred to as the universal solvent. Some beauty formulations are reported to include anywhere from 60% to 85% water, with rinse off products in skincare being much higher up to 90%[44].

Addressing water footprints across the supply chain is especially critical as key sourcing regions in the Global South face water stress. In the industry, water re-use and recycling technologies have been deployed. For instance, L'Oreal introduced Waterloop to limit the volume of water withdrawn for industrial processes at production sites[45]. Shiseido has implemented a Discharged Water Recycling System and reuses it through its systems in factories in China, France and around the world[46].

Partnering with suppliers focused on regenerative agricultural practices can also boost water efficiency for organisations given the water efficient farming techniques used. Take Weleda, who sources ingredients from biodynamic farms that practice careful water stewardship[47] and Aveda that works to source botanicals from certified organic farms with reduced irrigation[48].

Biodiversity

Impacts to ecosystems and biodiversity often begin with how ingredients are harvested and cultivated. This highlights the importance of traceability, standards and audits to monitor these activities.

Encouraged by global policy developments such as the Global Biodiversity Framework and European Deforestation Regulation (EUDR), more companies are actively measuring and managing their impacts and dependencies on nature. A growing number of firms are reporting to frameworks such as the Taskforce for Nature-related Disclosures (TNFD) and companies like luxury group Kering have even set Science Based Targets for Nature[49].

Organisation's are now recognising how nature-related risks can become increasingly tangible through financial, operational, societal and reputational consequences. L'Oreal and Weleda are working with the UEBT to ensure biodiversity is protected in their ingredient sourcing and L'Oreal reports supporting suppliers with agricultural practices that are compatible with biodiversity and the soil[50].

Beauty's move to regenerate nature

Leading companies in the sector are now integrating regenerative practices into their sustainability and biodiversity strategies. It's no longer just about measuring, managing and reporting on nature-related risks but adhering to activities and engaging in initiatives that are rooted in conservation and restoration as well as supporting communities.

Regenerative agriculture is one application across the industry's supply chains, involving the process of restoring degraded soils using responsible management practices such as adaptive grazing, no till planting and no use of synthetic fertilizers and pesticides[51].

L'OCCITANE Group has integrated regenerative agriculture within its sustainability strategy and has publicly committed to restoring ecosystems. The company has a codified regenerative agriculture framework, collecting metrics on soil health, biodiversity and farmer livelihoods. Having conducted thorough research into its sourcing practices across 18 countries and 54 key plant species, it identified that ingredients such as shea butter, lavender and coconut could be supported through strong practices.

In Provence, where the company sources its lavender, the Group launched a pilot program in 2021 for lavender farms to experiment with cover crops and hedgerows to rebuild soil fertility and habitats[52].

Haircare brand, Davines, offers another example of regeneration in play. In partnership with the Rodale Institute, Davines established a 10-hectare hub – the European Regenerative Organic Centre, with the aim to educate farmers on regenerative practices like crop rotation, companion planting and low-chemical protocols[53]. The brand's haircare line contains specific ingredients grown from a slow food farm, including plants like red celery, olives and lentil seeds.

Smaller beauty brands have built their premise on regenerative practices too. Take Thrive Skincare, a company that works to restore degraded farmland in Costa Rica and build resilient farm communities, all whilst cultivating plants to power its skincare. Thrive's practices involve incorporating native plants for resilient systems as well as policies on no tilling and chemical usage. The company measures key indicators like soil health, water retention and the social wellbeing of farmers[54].

5.3 Packaging

Packaging plays a significant role in the cosmetics industry's environmental footprint. By investing in recyclable, biodegradable, or reusable packaging, brands have an opportunity to significantly reduce waste.

Beyond environmental benefits, high-quality packaging helps protect the integrity and freshness of products, ensuring that consumers receive a product that is as effective and safe as it is circular by design.

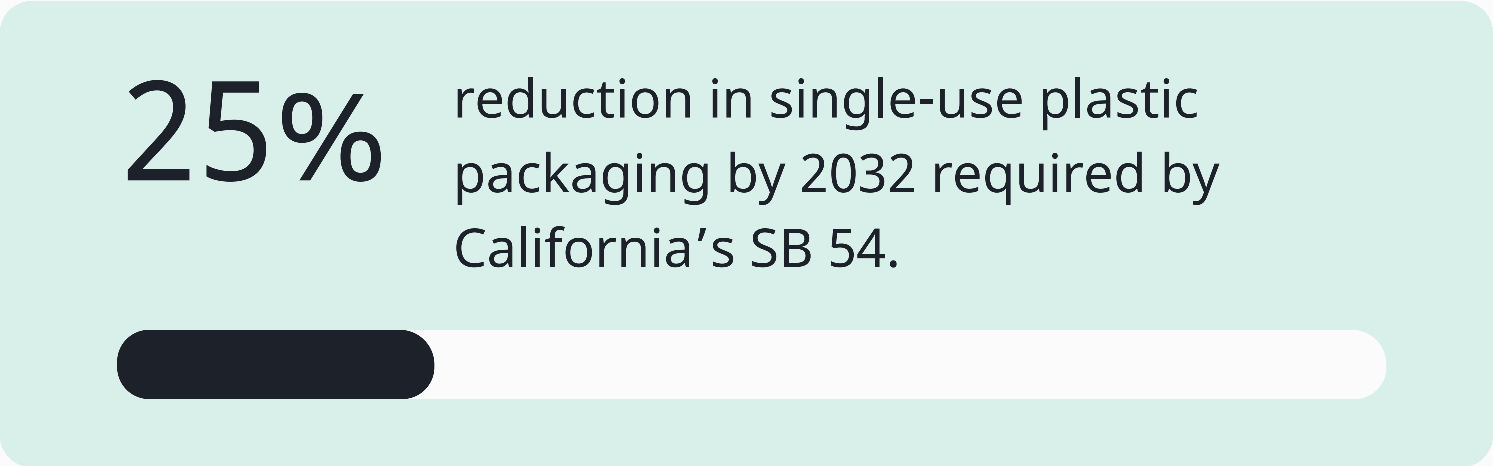
Regulation is driving the sustainable packaging push. The Extended Produce Responsibility Framework in the UK seeks to minimise the lifecycle impacts of packaging with a focus on take back schemes, labelling obligations as well as fees on the recyclability or material type.

In Europe, the EU Packaging and Packaging Waste Directive (PPWR) looks to legislate on packaging formats, recyclable content targets amongst others.

Similarly, California's SB 54 (Plastic Pollution Prevention and Packaging Producer Responsibility Act) requires a 25% reduction in single-use plastic packaging by 2032.

Elsewhere, South Korea has specific packaging grade systems and Japan maintains its Law for Promotion of Sorted Collection and Recycling of Containers and Packaging.

Developments surrounding the UN Global Plastics Treaty, with continued negotiations in August 2025 could impact the industry and mandate reductions in single-use plastics, increasing the responsibility for end-of-life packaging and encouraging reuse and refillable models.



Industry players are also collaborating through the Sustainable Packaging Initiative for Cosmetics (SPICE), to collectively make progress on sustainable packaging policy, innovation and transparency[55]. These shifts are being encouraged by consumer demand too. Clean Hub reported that 81% of shoppers assert that brands should actively reduce plastic packaging and the same research identified that almost half would be willing to pay more for sustainable packaging[56].

Packaging acts as an exciting platform for players to test and scale innovations to reduce environmental impact of products with many exciting examples entering the foray. L'Oreal partnered with LanzaTech and Total on the world's packaging made from captured and recycled carbon emissions. The beauty company uses the sustainable polyethylene to create packaging with the same performance as conventional fossil-based plastic[57].

Haeckels uses mycelium-based materials for protecting cushioning alongside bottle seals that are algae derived. It has also experimented with a biopolymer called Viomer which is grown by microbes, that can be composted and recycled back into the brand's supply chain.

Waste from ingredients is also being innovated with to create packaging. Xampla, creator of Morro, partnered with Elemis to use its technology to transform surplus borage meal which is protein rich to create a heat sealable sachet from plant-based proteins.

"

At Lush, customers can return black plastic items to shops for recycling through the 'Bring It Back' scheme, or they are designed to be easily recycled at home. Understanding that the make-up industry is a big contributor to packaging consumption, we have been prioritising eliminating or reducing the use of packaging in our makeup range. We succeeded in pioneering some 'naked' formations by turning liquid products solid so that they don't require any plastic packaging, like our Naked Mascaras and Slap Sticks"

Lush Beauty Buying Team

Xampla – Innovating with ingredient waste to create packaging

In conversation with Alexandra French – CEO, Xampla

Spun out of Cambridge University in 2018, Xampla's natural plant polymer technology is an innovative technology powering materials to change the world with plastic-free replacements and more. It works to address hidden plastics that appear in everyday products, including fragrances where it uses encapsulation technology to replace plastics with a plant and protein-based alternative.

Q In 2023, it was announced that Xampla would partner with Elemis to use Morro. Are you able to tell us more about the collaboration?

A This particular collaboration was an R&D project to explore how leftover plant waste from Elemis' product ingredients could be transformed into a film to replace packaging in sample sachets. Specifically, the team worked with waste from borage oil production after the oil was extracted and the remaining meal, which is protein-rich, was provided to Xampla. We extracted the borage protein from that meal to create a film, which was then turned into a heat-sealable sachet. This was a technical success, proving the concept, and was showcased on stage at COP28.

While it's not yet at commercial scale, the project sparked significant commercial interest, especially from Elemis, who are committed to eliminating plastic from their packaging.

Q Why is the use of upcycled waste ingredients to create packaging so important?

A Using upcycled waste ingredients to create packaging is important because it offers great end-of-life properties. Plant proteins provide the protection needed during a product's use, but crucially, they also break down in nature, unlike plastic sachets that can persist in the environment for hundreds of years. One of the key benefits of plant proteins and other natural polymers is their abundance and versatility.

Q How can we speed up the shift to adopt more sustainable modes of packaging?

A The transition to sustainable materials in the beauty and cosmetics industry has been slow partly because we need to ask whether the right solutions are truly available at scale. Brands want the reassurance that if they start a development project, the material will be available at the volume needed to take it to market.

It's also about ensuring that the technology can integrate seamlessly into existing manufacturing infrastructure. There shouldn't be a need to build a whole new factory. For example, Morro films can be cast into existing manufacturing lines. This approach reduces friction across the supply chain. Xampla's licencing business model supports this by licensing our technology to manufacturers who already have the necessary equipment, infrastructure, and expertise. This helps to increase cost efficiency and speed up adoption.

Image courtesy of Xampla

6. Circularity, innovation and AI

Embracing the circular economy

Integrating principles of the circular economy by eliminating waste and pollution, circulating materials and regenerating nature is an exciting frontier for the industry as players reconsider how products and packaging are designed, sourced, distributed, used and disposed of.

As a resilient system that underpins planetary and societal health, the business case for adoption includes cost savings and resource efficiency, new revenue streams, innovation and managing regulatory risk[58]. BSI is proud to have led the development of BS 8001, the world's first standard guiding organisations in implementing circular economy principles, demonstrating our ongoing commitment to this topic.

There is an opportunity to innovate around modular and refill-first packaging design, upcycling ingredients and reuse systems. For instance, BYBI Beauty uses strawberry seeds from the juicing industry to cold press into a strawberry seed oil for its products[59] and Miller Harris is working to upcycle ingredients like hydrolat sage and oakwood through the hydro-distillation process of sage leaves to replace virgin water in its product formulation and fragrances[60].

Chinese cosmetic company Yan An Tang recovers bottles from customers through a return scheme and reported that over 280,000 users have engaged with the programme to help the business recycle 750,000 cosmetic bottles[61].

280,000

Yan An Tang customers have used their bottle recovery programme

750,000

cosmetic bottles recycled by the Yan An Tang business

LanzaTech – Transforming captured carbon into sustainable formulations

In conversation with Freya Burton – Chief Sustainability Officer at LanzaTech

LanzaTech is an Earthshot prize finalist and innovator taking captured carbon and using its recycling technology to transform pollution converted by bacteria to transform into fuels and chemicals with different applications for the beauty industry on formulations and packaging.

Q Tell me more about your partnership with Coty to make ethanol used in formulations more sustainable?

A Most people think of ethanol as something that comes from crops, fermenting plants using yeast and sugar. At LanzaTech, we do things a bit differently. We use a special bacteria, which has the same safety classification as yeast. It's anaerobic and part of natural biology, only instead of consuming sugar, it consumes waste carbon.

Carbon-captured ethanol involves nearly zero water consumption and reduces the need for agricultural land, in turn limiting Coty's impact on biodiversity and lowering the company's carbon emissions related to fragrance production. We first introduced this sustainable ethanol in a household cleaning range, and then began working with Coty in 2021. For them, it was a real point of difference to be able to use sustainable ethanol in their fragrances.

The goal was always to make this transition scalable to gradually replace conventional ethanol across their fragrance portfolio. In 2022, we saw the first volumes going into Coty's fragrances, including high-profile launches like House of Gucci's Alchemist Garden collection. It's now in several of their owned brand ranges and men's fragrances.

Q LanzaTech partnered with L'Oreal to create the world's first polyethylene packaging made from carbon emissions. Tell me more about that collaboration.

A L'Oréal was one of the brands that really leaned into adopting this type of solution for their packaging. Traditional rPET has its limitations—it can only be recycled so many times, and it doesn't always meet the right colour or aesthetic requirements. With our recycled carbon PET, you get the same properties as conventional virgin PET. There's no compromise on quality, performance, or the look and feel of the packaging. We're now starting to see growing interest in this material, especially for pharmaceutical and food-grade applications where both safety and sustainability are non-negotiable.

Q What do you think are some of the barriers for brands to pilot and scale sustainable innovations like these?

A A specific hurdle related to scaling is related to polyethylene. The downstream processing infrastructure is already well established, but it requires huge volumes to make recycling viable. The demand needs to be aggregated to a level where it can be efficiently turned into end products.

Right now, only a few players, mostly large oil companies, have the capacity to process polyethylene at this scale, which creates a bottleneck for broader adoption. Overcoming that will be key to expanding sustainable polyethylene use in the future.

Image courtesy of Coty & LanzaTech

Innovative formulations

Undoubtedly, new innovations in biotechnology, green chemistry, and sustainable manufacturing are helping the cosmetics industry make strides toward lowering impact and enhancing product quality.

Innovative manufacturing processes can help to increase efficiencies and align with principles of green chemistry, energy conservation and waste reduction.

For instance, skincare brands like Pai are using supercritical CO2 extraction which uses volcanically sourced CO2 in its fluid state to be passed through the raw plant material, extracting all biologically ‘active’ components. This happens without any additional thermal stress and without using organic solvents[62].

The application of green chemistry for formulation processes has been identified as an important lever for decarbonisation[63]. Not only this, it can help to create solvent and water free formulations that can reduce dependencies on petrochemical solvents. Bio-fermented active compounds from sources like yeast are being used in hero products like SK-II Facial Treatment Essence. Examples of biotechnology being deployed include Bioassance who has sourced squalane from sugarcane instead of shark liver[64].

Renewable feedstocks are also gaining momentum. Nivea has used biobased ingredients like sugar and castor oil derivatives for its suncare product lines within its drive to provide ‘biodegradable’ skincare to consumers[65].

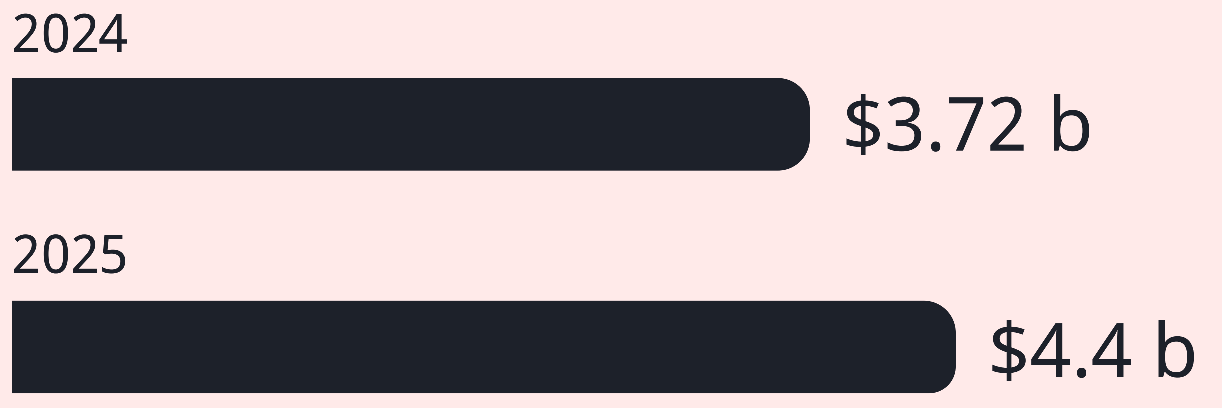
The application of AI

From ingredient formulation to packaging, production and personalisation, AI is embedding itself across the beauty and cosmetics value chain. The application of AI is creating an exciting market landscape, with notable expansion, as the market is set to increase from $3.72 billion in 2024, to approximately $4.4 billion in 2025[66].

According to McKinsey and Business of Fashion, almost half of executives in the industry recently surveyed believe that AI has the potential to transform the industry. Equally, AI was ranked 9^{th} of 10 perceived risks that the sector must navigate[67].

Use cases are set to increase efficiencies and enhance personal shopping experiences, such as augmented reality for shade matching, face diagnostics, personalised product recommendations and brand social listening. For instance, Unilever has developed an AI powered beauty hub that allows the organisation to analyse consumer data to tailor content as well as brand and product recommendations[68].

AI application in the cosmetic market set to expand from



AI also has the potential to help beauty and cosmetics players increase supply chain efficiencies and drive sustainability efforts. Businesses are putting AI to the test to do just that. IBM and L'Oreal embarked on a collaboration to use an ID foundation model that explores historic formulation data to identify opportunities to switch to sustainable alternative ingredients[69].

AI company Basetwo uses its platform to optimise the energy-intensive emulsion blending process in the manufacturing process. It simulates product scenarios and predicts optimal process parameters, to see where there are opportunities to reduce energy inputs and waste. This is particularly important for reducing supply chain emissions and environmental impacts at the product design level[70]. As a co-benefit, it also helps to accelerate production timelines and achieve cost savings.

Elsewhere, Makersite uses its AI powered product lifecycle intelligence software to enable companies like Lush to dive deeper into their supply chain data, as well as support with product Life Cycle Assessments to understand their impacts and design circular strategies in real-time[71]. For AI to serve as a force for good in the industry, strong governance and policy frameworks must be put in place to safeguard against reinforcing bias, enabling greenwashing and ensuring transparency around the use of algorithms and ethical use of consumer data.

7. Spotlight on social conditions

There are multiple social considerations that must be taken into account to act responsibly across supply chains and to create lasting relationships with stakeholders. This includes health and safety, fair purchasing practices, and enhancing human rights due diligence across the supply chain to protect workers.

As the industry leans more deeply into natural ingredients, full transparency and traceability of raw materials will enable organisations to gain clear oversight of power imbalances and conditions that do not align to international standards. World Vision spotlights the lack of formal employment through subcontracted labour as well as incidence of child labour which can be ended through co-ordinated efforts across production, sourcing, manufacturing, and purchasing paths of cosmetics products[72].

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Compliance is no longer a differentiator. It is standard, it is a norm. Now we need to shift towards evaluating its impact. It is the moment to co–create solutions that bring real change, not just within a single industry, but across sectors – for workers. Addressing poor working conditions often requires investment and attention by not just a single brand, or a single industry as a whole, but by multiple players across multiple value chains. Mica is a key ingredient in beauty products, and is heavily used by the automotive and aerospace industries too. Cross-industrial collaboration is thus required to lead to meaningful action."

Burcu Kuğu – Vice President, Innovation at Fair Labor Association

"Ideally, from a pragmatic standpoint, buyers for brands won't simply walk away because of concerns they find in their supply chains. Instead, we urge organisations to work with suppliers to help them along the improvement journey. The importance of a positive feedback loop in this process cannot be overstated. It starts with visibility, seeing what's really happening in the supply chain. Then comes the opportunity to do something about it. That's the piece of social responsibility that's gaining momentum more than ever."

Todd Redwood: Global Managing Director – Consumer, Retail and Food, BSI

"We've seen that combining digital traceability with worker surveys, social risk data, and community profiles enables brands to target interventions, monitor progress, and validate supplier claims. Technology alone is not a solution, but when grounded in worker-centred due diligence, it can transform opaque chains into accountable ones."

Burcu Kuğu – Vice President, Innovation at Fair Labor Association

Health and safety standards are a key area of focus too at each stage of the supply chain, as well as final use. Lack of protective equipment, exposure to harmful chemicals in factories and packaging factories remain a priority. Standards like ISO 45001 – the internationally recognized standard for Occupational Health and Safety (OH&S) management systems can help companies identify and manage risks related to worker safety and rights in addition to supplier audits.

Fair and responsible purchasing practices held between brands and manufacturers can also help to provide suppliers with security and can encourage resilience in supply chains. The Ethical Trading Initiative has instigated the Common Framework for Responsible Purchasing Practices in Manufacturing Industries (CFRPP MI) providing recommendations on how organisations can partner with suppliers for long-term stable sourcing, fair payment contract terms, mutually agreed lead times and costing that incorporates living wages[73].

Elsewhere, given the reliance of the sector on natural ingredients, often farmed and harvested in areas where Indigenous People's live, it requires acknowledgement of consent and fair compensation. This is particularly crucial when companies might patent or profit from traditional knowledge or resources as they create their products. It is also crucial in order to follow the Nagoya Protocol, an international agreement which aims to ensure the fair and equitable sharing of benefits arising from the utilization of genetic resources. Brazilian company Natura has been more progressive in creating value chains with local communities for ingredients like Uccuba butter, derived from a native Amazonian tree and cultivating relationships with Indigenous communities[74].

Some brands have social considerations at the heart of their mission. For instance, luxury fragrance brand Sana Jardin supports local female flower harvesters in Morocco and launched an accelerator programme to provide these women entrepreneurship training, market access, and access to capital[75].

8. Responsible communication and marketing

Accurate, truthful and accessible information communicated to consumers has become a critical area for brands when making sustainability related claims.

Engaging audiences on environmental and social impacts through easy-to-understand information is an opportunity for organisations to practice responsible marketing, whilst adhering to existing policies on green claims.

Enhancing trust with customers is important. In 2022, it was reported that 15% of shoppers now consider sustainability information more important than price, efficacy or the product description when buying a beauty product.

Almost three-quarters of consumers were recorded as unsure on what brands actually mean when they say ‘environmentally friendly’ and 62% say the same for ‘green’ claims[76], highlighting the importance of clarity and provision of evidence.

15% of shoppers now consider sustainability information more important than price

62% of shoppers unsure what brands mean by their ‘green claims’

More recently, the lack of trust with reliability of green claims, coupled with a higher cost of living has impacted sustainable consumption broadly, not just in the beauty sector. The European Commission recorded that environmental considerations in purchasing decisions fell 13% since 2022.[77]

To rebuild trust, standards and certifications help to assure not only businesses but customers with the provenance of their products, supply chain practices and true nature of ingredients. Beauty retailers like Cult Beauty are using third-party verifiers to detect compliance risks, strengthen claims and use this in the online customer journey to communicate whether a product has a public carbon footprint, recyclable packaging and a living wage employer, amongst others.

Communication on environmental and social sustainability is being incorporated into legislation too. For instance, the EU Green Claims Directive intended to ensure claims are independently verified and evidence-based, the correct use of sustainability labels and require clear evidence regarding carbon offsetting. The US Federal Trade Commission is set to release an updated Green Guides in 2025 and California has the SB 343, mandating truth in labelling for recyclable materials.

In the UK, the Competition and Markets Authority (CMA) set out powerful principles[78] through its Green Claims Code introduced in 2022 to help guide sectors, including the beauty and cosmetics industry:

1. **Be truthful and accurate**
2. **Be clear and unambiguous**
3. **Avoid omitting or hiding important information**
4. **Only make fair and meaningful comparisons**
5. **Consider the full life cycle of the product**
6. **Substantiate claims with evidence**

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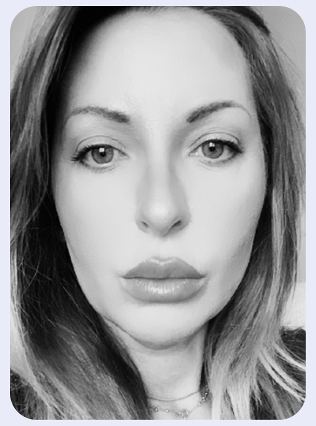
What we really need to focus on are the emerging risks and possible futures. That's where there's real potential for better communication. Certifications shouldn't just be a technical formality, they should be a communication tool. They can open up dialogue with the market.

So instead of keeping certification purely technical, we need to use it to manage risk first, but then broaden it to engage other stakeholders. Consumers want to understand what they're buying, not just whether it works, but how it aligns with their lifestyle and beliefs."



Elena Cervasio – Commercial Director Continental Europe – Internal Audit & Supply Chain Solutions, BSI

Consumer Protection – Making credible sustainability claims

In conversation with Cecilia Parker Aranha – Director of Consumer Protection, UK Competition & Markets Authority (CMA)

Q The Green Claims Code was introduced to help brands communicate environmental claims responsibly. What positive impact has it made to date?

A From businesses, we've received positive responses about the support the Code has given them. In particular, companies in FMCG and fashion have used it as an opportunity to go back and look at their systems, redesigning processes to ensure their claims are properly substantiated.

Q What are the most common missteps you're still seeing, especially in consumer-facing industries like beauty and cosmetics?

A One of the biggest issues we're seeing relate to general claims at the product level terms like 'sustainable', 'eco' or vague explanations that don't clearly set out what is meant. We've also looked at claims around packaging, particularly disposability. Our view is that if you're going to make a general claim that something is 'sustainable' you need to be able to demonstrate that the product has zero negative environmental impact. There are also issues around chemicals and toxicity, areas linked to health and safety.

And then there's 'organic' a term that's strictly defined in the food sector, but not outside of it.

Q How much of a responsibility lies with regulators versus brands to ensure customers understand what labels really mean?

A Businesses are responsible for making sure their claims are accurate and for providing the evidence to back them up. The role of regulators is to provide guidance and support.

One of the biggest challenges we've seen is a lack of consistency around definitions. It hasn't always been clear when businesses can use certain terms in their communications with consumers. That's created challenges in working out what standard of evidence is needed to support the claims being made. In part, this is what the Green Claims Code was created to do – bring some consistency. In our advice to government, we've said there should be a focus on creating common definitions and standardising how information is communicated to customers.

The challenge for regulators and governments is that while it's possible to set general rules, once you try to apply them across different industries, it becomes a much more detailed process to agree on a common standard.

Q We're also witnessing a new trend: brands going quiet on sustainability for fear of being called out. How do we strike the right balance between encouraging communication and ensuring accountability?

A When we introduced the Green Claims Code, we were clear that we didn't want people and businesses to stop communicating. The advice is there, and businesses can use it to communicate with confidence. There's a recalibration going on, and it's important to recognise that. Some businesses will decide not to take the risk. Others have already stopped making claims because they weren't able to back them up.

Universal beauty – communicating on inclusivity

While addressing technical environmental aspects around sustainability claims deserves attention from brands and communicators, so does the prioritisation of diversity and inclusion as social values. By clearly communicating how inclusion fits into a sustainability strategy, brands can shift narratives towards deeper, systems-level responsibility. This helps to build trust with increasingly value driven consumers as well as reframe sustainability as a people and planetary issue.

It is now no longer about what products are being made and how, but who they are made for and who might be excluded. An inclusive approach adopted by the beauty industry encompasses considerations for every skin tone, ability, gender identity, age and more. Without this, claims of true sustainability and social responsibility could be considered incomplete.

Prominent examples include the launch of Fenty Beauty in 2017 which redefined what it meant to be shade inclusive within the cosmetics industry. **By offering a range of over 40 foundation shades that serviced more skin tones, it demonstrated a socially responsible model in action and a response to underserved communities that may not have had access to similar products in the past[79].**

Similarly, L'Oréal has expanded access to beauty for people with disabilities and underrepresented groups and has launched the Inclusive Beauty Fund in the USA[80]. The company has embedded key principles into its Responsible Advertising and Marketing Communications Policy[81]. Such tenets include priorities to **'Embed diversity and inclusion in our advertising related to gender, age, socio-economic backgrounds, skin colour, body shape, disabilities, sexual orientation, religion, etc., and assess improvement.'** And, 'to continue to play a strong role in raising awareness of the full diversity of beauty'.

Dove's Campaign for Real Beauty has existed for over two decades and remains one of the most recognisable examples of inclusive marketing in action. It challenges narrow beauty standards, featuring people of all ages, sizes, skin types, and ethnic backgrounds[82]. The company has most recently committed to the **'No digital distortion' mark to eliminate manipulated images[83] and launched the #TurnYourBack campaign on TikTok to push back against harmful beauty filters, particularly those affecting girls' self-esteem[84].**

9. Setting out a path for the future

With clear standards, investment in technology, and inclusive supply-chain partnerships, cosmetic brands can meet environmental and social demands and a path to a more business resilient future.

Key hurdles to overcome include:

Cost and capacity constraints as smaller brands look to finance the costs that robust audit, technological and sustainable material innovations often require.

Regulatory pressures and incentives – In particular, proactive management of legislation mandating rules on chemicals, packaging, health and safety, sustainability reporting regulations and more.

Consumer expectations – Meeting the rising demand for high quality, efficacious products that are ethically sourced have a reduced environmental impact.

Priority actions include the adoption of internationally recognised standards, a full mapping of supply chain operations beyond Tier 1 as well as the strengthening of supplier partnerships and investing in safer and sustainable alternative ingredients that can be fully traced back to source.

The Traceability Alliance for Sustainable Cosmetics (TRASCE), made up of leading cosmetic makers including Estée Lauder, L'Oréal, Chanel and Dior has been instigated to address some of these issues including traceability at scale, to touch on ingredients or components used, their origins, supplier activities, places of transformation and names of suppliers[85].

"The biggest improvement we're seeing is in the social aspect. It's not just about labour conditions anymore, it's about our responsibility to the next generation. This means rethinking how we're developing products and carefully considering where we're taking them."

Elena Cervasio
Commercial Director Continental Europe – Internal Audit & Supply Chain Solutions, BSI

British Beauty Council & Sustainable Beauty Coalition

In conversation with Victoria Brownlie, British Beauty Council & Sustainable Beauty Coalition

We spoke with Victoria Brownlie, Chief Policy & Sustainability Officer at the British Beauty Council and Sustainable Beauty Coalition to understand the industry's opportunities to chart a path forward.

Q What are the biggest priorities for British Beauty Council and the Sustainable Beauty Coalition right now?

A These centre around driving the industry towards greater environmental and social sustainability through collaboration. This includes the Great British Beauty Clean Up aimed at reducing the amount of landfill waste created by the industry, packaging solutions as well as the Planet Positive Beauty Directory covering retail and ecommerce, brands and manufacturers, and other tools to guide sustainable decision making.

Q Why is ambitious regulation critical to helping the industry move towards greater environmental and social sustainability?

A Ambitious regulation in areas like plastics, Extended Producer Responsibility (EPR), and green claims is critical because it establishes a clear, consistent, and level playing field for the entire industry. Without robust regulation, voluntary efforts, while well-intentioned, often fall short of delivering systemic change. Regulation drives innovation by creating a market demand for more sustainable materials and practices, and it provides the necessary impetus for businesses to invest in the research and development required for genuine environmental and social progress.

Q How do you see audits and certifications playing a role in stronger due diligence and building trust with consumers?

A Audits and certifications play a crucial role in strengthening due diligence within the industry. More importantly, they are vital for building trust with consumers. In an age where consumers are increasingly scrutinising environmental and social claims, independent verification through audits and certifications provides credibility and transparency.

Q Are you witnessing an appetite from investors for sustainable beauty brands?

A Investors are increasingly looking for sustainable innovation and brands with purpose that are built for the future. They want to work with brands that have clear, measurable sustainability strategies, strong governance, demonstrable impact, and authentic communication around their environmental and social commitments. They are seeking businesses that are not only profitable but also resilient and responsible in their operations.

Q Looking ahead, where would you like to see the cosmetics and beauty industry in five years' time?

A Progress for me looks like genuine collaboration to meet shared challenges head on. The widespread adoption of circular economy principles, significant reductions in carbon emissions across the supply chain, full transparency in ingredient sourcing, and a truly inclusive approach to beauty that benefits both people and the planet.

10. Building the sustainable beauty business case

Integrating sustainability into product development is not just an ethical imperative, it's also good for business. In fact, there is evidence that for brands who embrace sustainability are more likely to experience long-term growth of specific lines, higher consumer loyalty, and greater brand differentiation.

For example, Unilever reported that 75% of its turnover in 2018 was driven by its Sustainable Living Brands, including beauty and personal care brands like Dove. They were recorded to have grown 69% faster than the rest of the business from the prior year[86]. Most recently, research from Harvard Business Review comparing thousands of labelled versus non-labelled products on sustainability backed by data provided by third party certifiers found that sustainability labels boosted consumer demand by approximately 14% for eight weeks after the addition of the label[87].

75% of its turnover in 2018 was driven by its Sustainable Living Brands

Key factors contributing to the business success of sustainable cosmetics:

- **Increased customer loyalty:** Consumers are more likely to remain loyal to brands that share their values and demonstrate a commitment to sustainability.
- **Premium pricing:** Sustainable products can sometimes command higher prices, reflecting the increased costs associated with ethical sourcing and environmentally mindful practices.
- **Attracting new customers:** Sustainability is a major purchasing factor for many consumers, attracting a new segment of environmentally conscious shoppers
- **Positive brand perception:** Companies with a strong sustainability profile often enjoy a positive brand image, which can translate into increased sales and market share.
- **Reduced environmental impact:** Sustainable practices reduce waste, pollution, and resource depletion, aligning with broader environmental goals.
- **Compliance with regulations:** As regulations around sustainability become more stringent, companies that have already adopted sustainable practices are better positioned to comply.

These considerations also accompany straightforward benefits including increasing efficiencies for cost saving, mitigate reputational risks that can come with legal implications and financial implications.

11. The role of certifications and audits

The adoption of globally recognised standards and continued dedication to supply chain due diligence through auditing can play a critical role in enhancing the beauty and cosmetic industry's progress towards environmental and social sustainability.

Not only this, but they play a critical tool in helping company's become compliant with global regulations be that in relation to chemicals, environmental management, water and fair and just working conditions. Certifications and robust auditing processes can work hand-in-hand to raise the performance benchmark for organisations and help them to reach specific ESG targets too.

Environmental aspects

- Ingredient sourcing verification
- Reduction of toxic chemicals
- Meeting packaging requirements
- Carbon/water/chemical footprint transparency
- Life Cycle Analysis Integration

Social aspects

- Human and labour rights
- Traceability/transparency
- Community benefit sharing
- Third party accountability
- Brand reputation and consumer trust

For success, these should be embedded into a wider approach that includes stakeholder engagement, long-term commitments, regulatory alignment, and internal company incentives.

Audit integrity is essential, as is combining these tools with worker feedback mechanisms, grievance channels and continuous monitoring that works with suppliers to build capacity in areas where they can improve.

"

The beauty and cosmetics industry has an opportunity to build on robust auditing processes, not just for the sake of certification, but to support second-party audits and independently verify supply chain claims. That would allow sustainability declarations to be backed by something truly reliable. And organisations like BSI can really help here. It's not just about checking boxes—it's about verifying whether a claim is true or false, and giving both companies and consumers something they can trust."

Elena Cervasio – Commercial Director Continental Europe – Internal Audit & Supply Chain Solutions, BSI

Sustainability

In conversation with Hiroshi Tojima – Sustainability specialist, Internal and Supplier Audit, Business Development Manager, BSI

Q **How can certifications help companies mitigate reputational and operational risks—particularly around worker rights, sourcing, and environmental impact?**

A Certifications provide independent assurance that a company meets recognised standards. This builds trust with consumers, investors, and regulators, reducing the risk of backlash from unethical practices.

The transparency they can bring helps prevent greenwashing and labour rights violations from going unnoticed.

Elsewhere, when it comes to operational risk reduction, certifications like ISO 45001 help companies identify and manage risks related to worker safety and rights and standards like ISO 14001 guide companies in minimizing environmental liabilities and regulatory breaches. Certified systems often include incident response protocols, corrective action plans, and continuous improvement mechanisms.

Q **For businesses, what does the certification and audit process with BSI involve?**

A Working towards certification and auditing in the beauty and cosmetics industry involves a structured, supportive process designed to ensure compliance, quality, and sustainability. Here's a step-by-step walkthrough of what that simple journey might look like:

- Engagement and needs analysis
- Audit planning and preparation
- Onsite audit
- Delivery of audit report
- Review of corrective actions on nonconformities for continuous improvement as necessary.

12. How BSI can help

BSI works with businesses to help map, monitor and strengthen their supply chains by providing certification services and auditing services. With BSI's guidance and team of experts, organisations are able to navigate the increased complexity of global supply chains, sustainability regulations and drive high product quality demanded by customers of the beauty and cosmetic industry.

We can work directly with you on creating sustainable supply chains, including traceability, sustainable procurement, supply chain due diligence (including disclosure and reporting, supplier management, and risk assessment) and animal welfare.

BSI is able to offer strategy advice and support on creating and implementing frameworks, standards and best practices that provide guidance on a number of topics, including carbon neutrality, life cycle assessments (LCAs), GHG management, GHG verification and validation, water management, waste management and the circular economy.

Environment

- Scope 1 and 2 GHG Accounting and Verification
- Scope 3 GHG Management
- Water Management, ESG Reporting
- Connect Climate (SaaS)
- Supplier Engagement (LCAs)

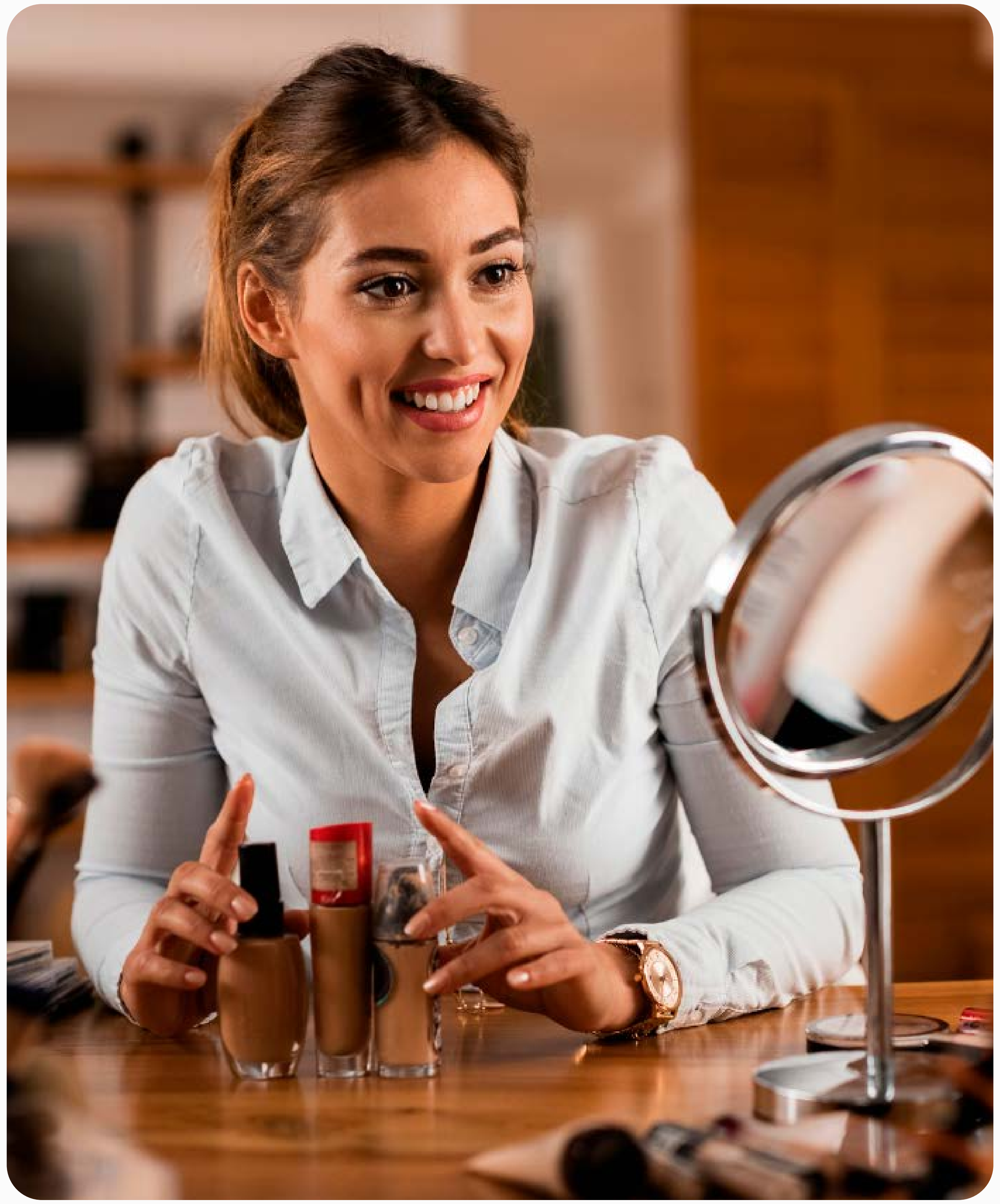
Social

- Client-owned Programs (Code of Conduct)
- Industry Standards (SMETA, SA 8000)
- Disclosure and Reporting (Human Rights Due Diligence)
- Supplier Improvement Programs
- Connect SCREEN (SaaS)

"

At BSI, for manufacturers in the beauty and cosmetics industry, we offer robust internal/compliance and supplier audits based on GMP requirements by high competency GMP experts. These audits help identify gaps, ensure compliance, and drive continuous improvement across the supply chain. We also offer EHS, social-related audit services as well as training on standards related to greenhouse gas emissions and energy management systems."

Hiroshi Tojima – Sustainability specialist, Internal and supplier Audit, Business Development Manager, BSI



For the beauty and cosmetics industry specifically

- Cosmetic GMP (ISO 22716)
- Client original audit check list and report similar to cosmetic GMP
- Client original audit checklist and report similar to cosmetic ingredient GMP
- ICHQ7 (for sunscreen products in the US market)

Cosmetic GMP (ISO 22716)

ISO 22716 is an internationally recognized standard for Good Manufacturing Practices (GMP) in the cosmetics industry. ISO 22716 provides comprehensive guidelines for the production, control, storage, and shipment of cosmetic products, introducing a management systems approach to ensure product quality and safety throughout the entire supply chain.

The standard covers all aspects of cosmetic manufacturing, including:

- Organization and personnel responsibilities
- Premises and equipment hygiene
- Raw material and packaging controls
- Production processes
- Laboratory controls
- Waste management
- Product storage and transport
- Internal audits and documentation

ISO 22716 is designed to help cosmetics businesses comply with regulatory requirements (such as the European Cosmetics Regulation), reduce risks, and demonstrate a commitment to high-quality, safe products. Audits to ISO 22716 by BSI assures customers and regulators that a company follows globally recognized best practices for cosmetic manufacturing.

For those operating with facilities in Japan, BSI has recently expanded its efforts to conduct audits with specific focus on the Cosmetic GMP for cosmetic products and ingredients.

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Burcu Kuğu – Vice President, Innovation, Fair Labor Association

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Florence Welke and the Beauty Buying Team – Lush

Todd Redwood

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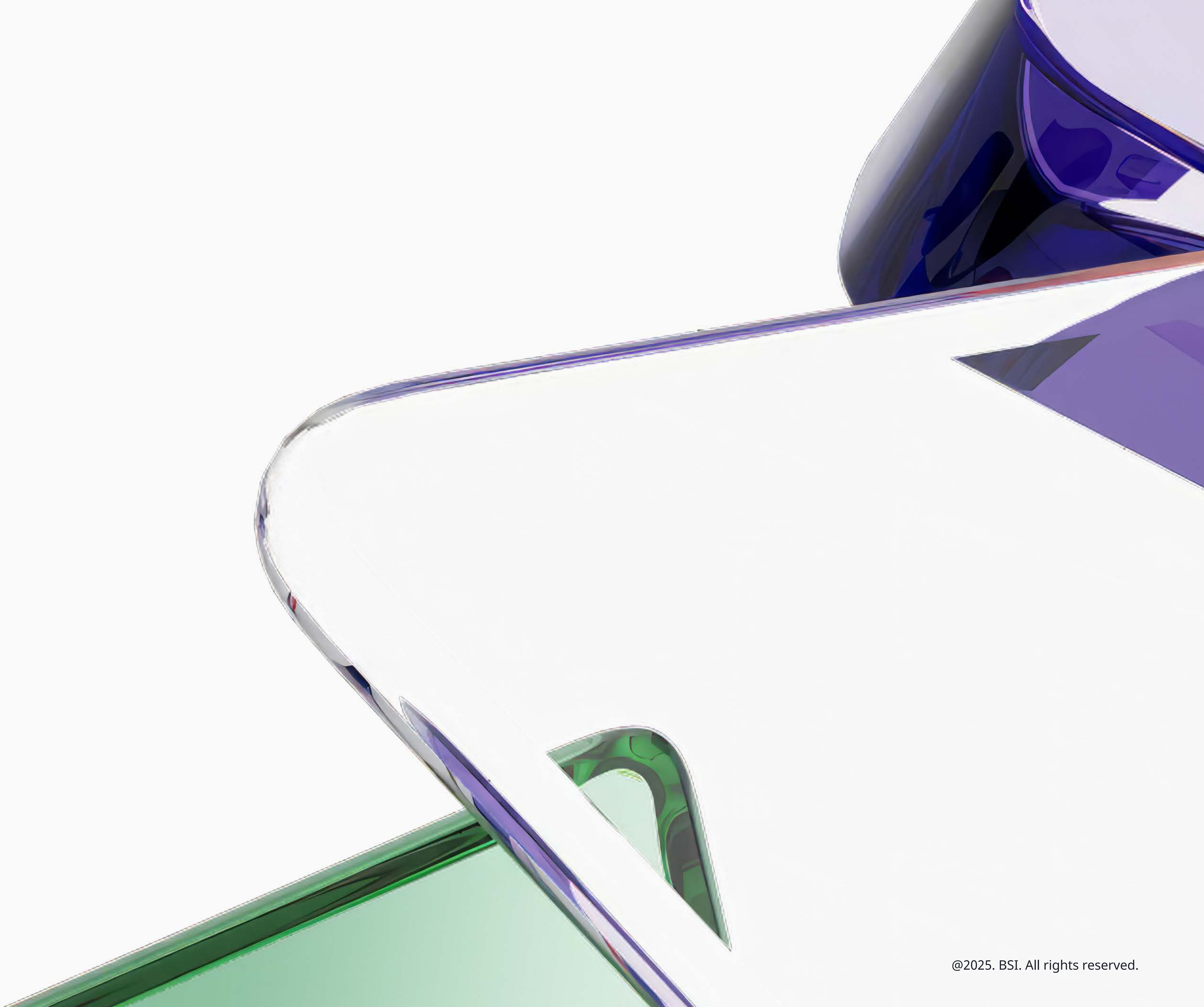

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