

# Future of Makeup

## Strategic outlook beyond 2025

Key insights that can help recalibrate your strategic bets in the **'Makeup'** category

Green Chemistry Formulation

Predictive product innovation

AI driven personalization



# Contents



## **Executive snapshot**

An incisive overview of the transformative shifts reshaping beauty industry.

## **Adoption Readiness Radar**

Emerging innovations poised to redefine beauty industry dynamics.

## **Growth drivers decoded**

Core macro and micro forces fueling the beauty industry's exceptional growth trajectory.

## **Trend spotlight**

The single most impactful trend set to shape the beauty landscape in 2025.

## **The new consumer canvas**

How evolving consumer preferences are painting a new picture for beauty brands.

## **Social commerce reimaged**

Analyzing the power and promise of social media-driven consumer spending.

## **The evolving landscape of beauty research, development & insights**

The shifting paradigms transforming beauty industry exploration and innovation.

## **Now trending: Makeup transformations**

From instant & adaptive makeup & tech-forward to male-focused enhancements.

## **Questions leader must ask**

Critical explorations every CXO should prioritize to navigate upcoming disruptions.

# Executive snapshot

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## **AI-powered personalization is redefining what “premium” means in makeup**

Eighty percent of beauty shoppers now expect shades and textures calibrated to their exact tone or skin need, and brands using AI shade-matching are lifting average order value by 24 percent. Those without proprietary color-genome data risk rapid share loss as micro-custom drops become the new launch norm.

## **Sustainability credentials - waterless, refillable, clean - are no longer optional**

Sixty-eight percent of Gen Z say they will pay more for solid sticks, powders, or refill pods, and retailers are moving toward net-zero packaging mandates for 2030. Brands that shift half of new-product development to anhydrous or refill formats today can secure low-carbon ingredient contracts and lock in future shelf space.

## **Creator-driven social commerce has become the industry’s primary growth flywheel**

Makeup shoppers already spend an average of \$800 a year via social platforms, with influencer content generating a 7.5 percent engagement rate versus 1.9 percent for brand posts. Always-on creator collaborations paired with TikTok Shop and Instagram Checkout compress click-to-cart to under three taps and convert influence into immediate revenue.

## **Maximalist eyes and brows signal a post-mask color hierarchy shift**


Eye products grew 6 percent quarter-on-quarter in Q4 2024 (EU) as bold looks went viral, reversing the pandemic lip surge. Redirecting investment from lip to eye innovation - augmented by immersive AR try-ons - positions portfolios to ride the next multi-billion-dollar wave in color cosmetics.



## BEYOND 2025

### Next beauty decade: The new rebellion in makeup

#### WHAT NOW?

- 
- Limited Shade Ranges  
**Inclusive Color Palettes**
  - Single-Purpose Products  
**Multifunctional Formulations**
  - Traditional Marketing  
**AI-Driven Personalization**
  - Physical Retail Dominance  
**Omnichannel & Digital Integration**
  - Basic Brand Claims  
**Evidence-Based & Sustainability Focus**

# Adoption readiness radar

## Emerging makeup trends

### Trends

### Rationale

AI Shade-Matching  
Kiosks (Digital/Data)



**MAINSTREAM  
2025**

Deployed in top 50 beauty retailers; >60% of new SPF & primer launches carry blue-light claims.

Blue-Light Protective  
Primers (Formulation)



Climate-Smart Refill  
Systems (Sustainability)



**SCALING**

>25 global brands committing to refill pods; anhydrous foundations growing 18% CAGR.

Waterless Press-to-Activate  
Foundations (Formulation)



Neuro-Active Lip/Face  
Products (Formulation)



**EARLY-  
ADOPTER**

Prestige pilots in US/KR; printers in 12 concept stores.

3D-Printed Custom Color  
Cartridges (Application Tech)



Haptic VR "Try-On" for  
Home Sampling (Digital/Data)



**PILOT**

Limited drop tests; data on compliance & delight still small.

Carbon-Negative Bio-  
Pigments (Sustainability)



Sensory-Adaptive Textures-heat-shift  
blush, pH gloss (Consumer Exp.)



**LAB/  
HORIZON**

Proof-of-concept only; IP race & regulatory clarity pending.

Smart Applicators with micro-  
pigment dosing (Application Tech)



# Growth drivers decoded



The global makeup industry, a dynamic segment of the broader cosmetics market, is poised for substantial growth and innovation. The intersection of technology and beauty is ushering in an era where personalization, sustainability, and inclusivity are paramount.

## ➤ AI and Beauty Technology

Artificial intelligence is transforming beauty experiences, offering everything from AI-driven skincare suggestions to personalized product formulations.

**77%** of beauty professionals think that conversational AI tools, like chatbots and virtual assistants, have unparalleled potential to create personalized interactions.

## ➤ Sustainable Products

Carbon-neutral production and cruelty-free testing are becoming increasingly popular, reflecting consumers' growing demand for ethical practices.

Generation Z is leading the charge, with **67.7%** prioritizing sustainability and **56.2%** willing to pay more for eco-friendly beauty products.

## ➤ Clean Ingredients

The clean beauty movement emphasizes safety, transparency, and non-toxic formulations, with beauty products free from irritants like parabens and sulfates.

**63%** of consumers now look for products with natural ingredients, while **65%** of women aged 35–54 carefully examine ingredient lists before making a purchase.

## ➤ Smarter Makeup Choices

As the cost-of-living increases, consumers are adopting more practical and efficient beauty routines. Many are ditching excess products, preferring to invest in multifunctional items that can serve multiple purposes.

**32%** of consumers now choose high-quality, lower-cost alternatives to makeup. To achieve luxury results without the hefty price tag.

## ➤ Mob Beauty - Bold Brows and Lashes



Bold brows and full lashes remained key trends. Products like brow gels, volumizing mascaras, and lash and brow serums continued to be favorites for accentuating natural beauty.

The market is experiencing a renaissance, driven by cutting-edge makeup techniques and the powerful impact of social media followed by GenZ being the potential driver.



# Trend spotlight

The global makeup industry, a dynamic segment of the broader cosmetics market, is poised for substantial growth and innovation. The intersection of technology and beauty is ushering in an era where personalization, sustainability, and inclusivity are paramount.

TREND & OVERVIEW	INDUSTRY RESPONSE
<p><b>Performance Makeup</b></p> <p>The rising popularity of medical aesthetics has had a major impact on the skincare industry.</p>	<p>SHISEIDO's Revitalessence Skin Glow Foundation that infuses skin care benefits into makeup formulations.</p> 
<p><b>Freckle Stamps</b></p> <p>Freckle stamps are temporary tattoo giving freckles on cheeks giving aesthetic look. The demand comes from increasing demand of personalized offerings to modern consumers who appreciate the flexibility to change their style without long-term commitment.</p>	<p>Boobeen Freckle Stamp with liquid air cushion has a unique freckle stamp design. Suitable for all skin tones for giving sun kissed look.</p> 
<p><b>Climate-smart Beauty</b></p> <p>Climate-smart beauty reduces environmental impact while promoting sustainability. It involves using ingredients, packaging, and production methods that are eco-friendly, carbon-neutral, or aimed at reducing overall harm to the planet.</p>	<p>Kahi's Airy Fit Sun Stick fits into the palm with latest sun care R&amp;D that strengthens the formula when the temperature rises or when it gets exposed to water.</p> 



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## TREND & OVERVIEW

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### Hyper-personalization with AI

Artificial intelligence is creating personalized beauty experiences, ranging from AI-driven skincare suggestions to tailor-made product formulations.

## INDUSTRY RESPONSE

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Coty's collaboration with **Perfect Corp.** improves skin diagnostics and data-driven personalization, a tailored shopping experience for brands like **CoverGirl** and **Sally Hansen**.



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### Supply Chain Digitization

Rise of technology driven approach to make the product development and production process more intuitive and effective for consumers.

**Prime Matter Labs** developed **Element**, a proprietary, cloud-based platform provides customers with the ability to access the platform to track the development of products in real-time.



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### Blue Light Protection

As screen time rises— with 60% of Americans spending over six hours a day on digital devices - concerns about blue light exposure and its effects on the skin are growing.

**Pür Out of the Blue Light Up High Shine Lip Gloss** comes with highly pigmented shade with blue light defense.



# The new consumer canvas

Consumers' evolving makeup preferences reflect a shift towards personalization, with a growing demand for inclusive, sustainable, and multifunctional products. There's also an increased interest in clean beauty, vibrant colors, and experimental textures, allowing for greater self-expression.

## ENVIRONMENT RESPONSIBILITY

**82%**

Of consumers expect brand's value to meet their own

**66%**

Of buyers look out for buying expensive products from eco-conscious brands

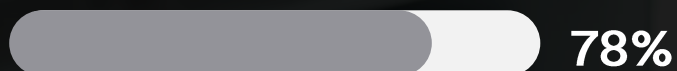
**60%**

Of consumers raises concern regarding global supply chain

## PERSONALIZATION INFLUENCE

### Recommend | Repurchase

78% Consumers are more likely to refer friends and make repeat purchase from brands offering personalization



### Purchase

76% Consumers are more likely to purchase from brands offering personalization



US 18+ years consumer survey with n=1,013



## MALE BEAUTY PRODUCTS

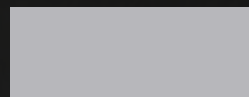
A large percentage of men adopted to daily makeup routine with  
Top motivation of using grooming and cosmetics

45%



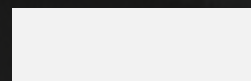
To improve skin texture

35%



Appearance

25%



Attract women

*Heterosexual males 18-34 years*

## AFRO-AMERICAN CONSUMERS

US Afro-American community dissatisfaction over right products to meet their specialized needs

▼ **5.7x**

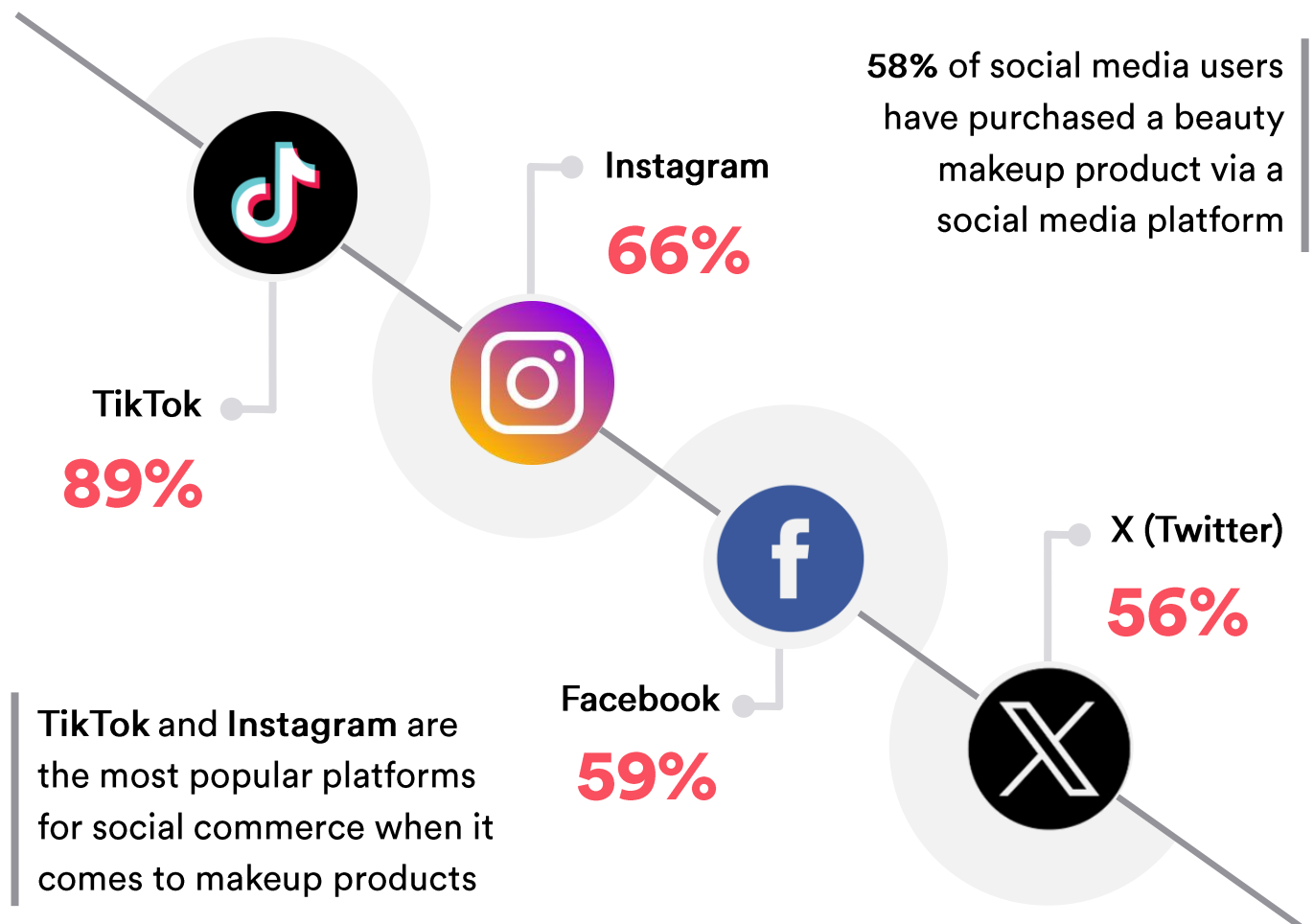
5.7x times of difference over satisfaction of Afro-American consumers on makeup products available in market compared to white consumers

*Consumer survey with n=6,200*

# Social commerce reimaged

Last year, the average social media shopper spent \$800 on social commerce, with consumers aged 18 to 44 leading the way. Beauty influencers saw an impressive engagement rate of 7.52%, while Instagram followed with a 1.87% engagement rate.

## MAKEUP PURCHASES MADE VIA PLATFORM





## DIGITAL COMMERCE ADAPTATION



### Social Media Trend Detection

Campfire is a social-first marketing agency disrupting the advertising industry by shifting focus from traditional media to social platforms. Their innovative tool, Spark, provides trend detection and analysis, helping brands stay ahead of rapidly evolving trends on platforms like TikTok.



### TikTok DTC Business

Truly Beauty leveraged TikTok platform to build their DTC skincare and makeup business. Which has led to increase in their search volume by 433% past five years. Rise of short-form video driving brand strategies for 2025, having long-term partnerships of influencers set to play a pivotal role in shaping success.

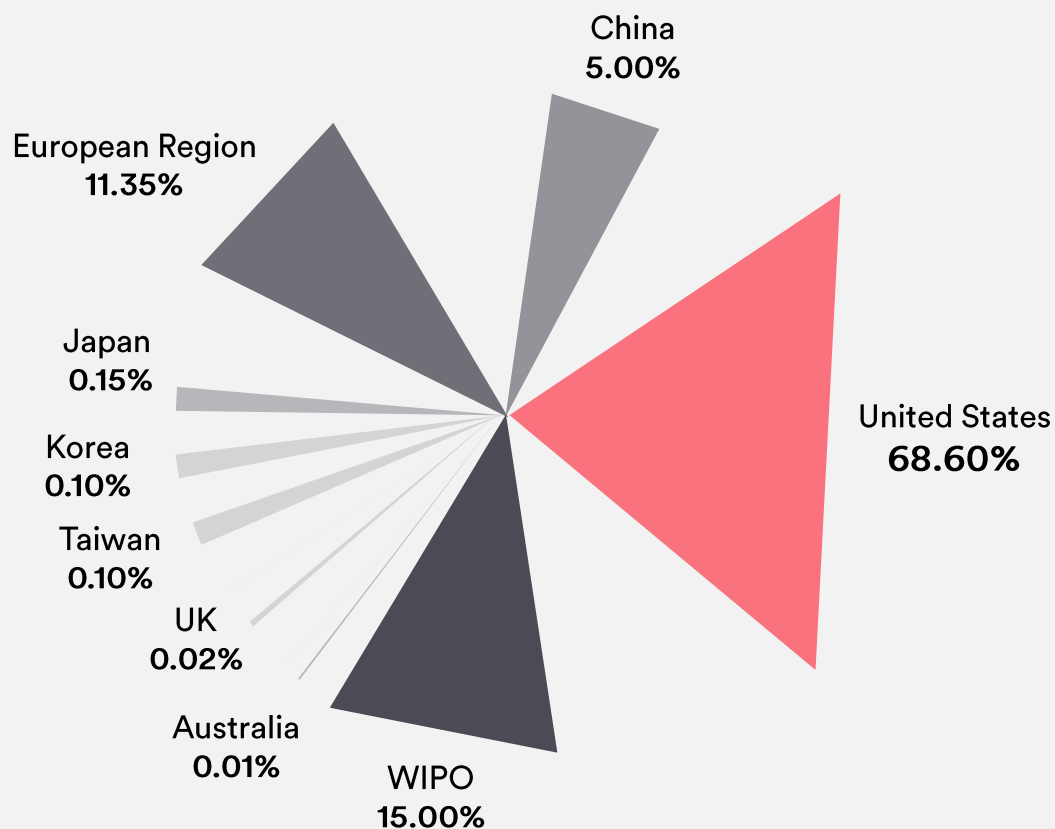


# The evolving landscape of beauty research, development & insights

Makeup industry witnessed approx. 8,198 patent filing majorly with CPC classification of human necessities, having focus on eye makeup, cosmetic use and sun protection. Other major CPC classification observed was physics having emphasis on machine learning, neural networks and facial tracking.

## PATENT FILING, Jan 2024-Feb 25

### Regional Patent Filing

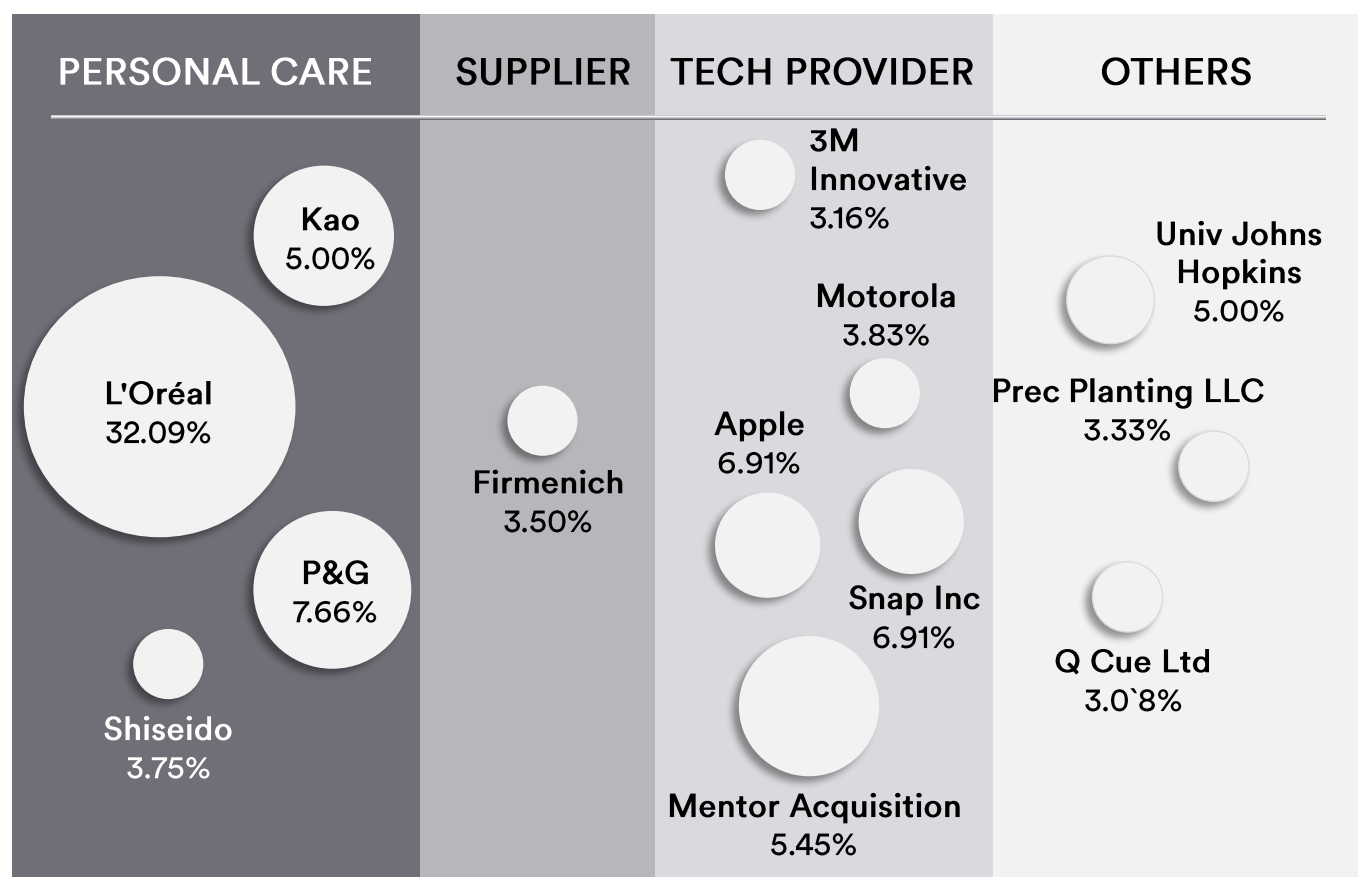


## GLOBAL FILING

Majority of patent filing comes from United States, leading the research followed by Europe and WIPO. APAC is the emerging region with 5% of total patent filing having emphasis on digital integration in makeups.

**Search Term:** ● Face OR ( Skin OR ( Body OR Hair ) ) AND Makeup

## Top company patent filing: Jan 2024 - Feb 2025



Bubble size depicts the number of patent filing by the company

Source: The Lens, ~ 8,198 Total Patent Count (Makeup)

## Top company filing

- **Personal Care Companies:** L'Oréal leads the research with ~32% of patent filing across makeup category. Other prominent companies doing filing under makeup categories are P&G, Shiseido, Firmenich, and Kao Group.
- **Tech companies:** such as Motorola, Apple and Snap are also showing activity in interest of exploring digitization and personalization within makeup industry by using machine learning, neural network and facial tracking apps.
- **Others:** Univ Johns Hopkins, Prec Planting LLC, etc. around Topical/Local Delivery of formulations.



# Now trending: Makeup transformations

Recent beauty innovations include 3D-printed makeup for custom products, smart devices that use AI to apply makeup, and skincare-infused makeup that offers both cosmetic and skincare benefits. Adaptive makeup adjusts to various skin tones, while waterless makeup reduces waste and enhances product concentration. These advancements focus on personalization, sustainability, and convenience in the beauty industry.



\*Picture Credit: Company Website

# WHAT NEXT?

- Rise of **Multifunctional Color Cosmetics**: Natural emulsifiers like Arxada's Geomulse transforming lipstick formulations beyond pigment. Consumers seek hydration, protection, and ethical alignment in color cosmetics.
- Rise of **Multi-sensory Experience**: Consumer preference for playful textures reaches 63%. Bouncy jellies and mochi-like formulas shape innovation strategy with novel textures.
- Rise of **Maximalist Appeal**: Eye makeup's bold return saw a 6% sales boost in Q4 2024 (European region). After lip and blush domination, maximalist looks move into the spotlight.
- Rise of **New Consumer Concepts** (2025 Rebellion-Fest):  
● **'Brat' Imperfection**: Embraces the messy, trashy anti-aesthetic against the hyper-curated "clean girl" look. **'Anti-woke' Tradition**: A countertrend valuing classic, traditional cultural touchstones.

## Expert's viewpoint

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Soft, flushed cheeks paired with sharp, precise eyeliner or matte foundation glossy, plumped lips, reimaged approach to matte finishes in 2025

👤 **Creator and beauty marketer – Estée Lauder Companies, Anthonino Olimpio**

“

Rise of "goddesscore," inspired by Greek and Roman aesthetics. Expect golden highlighters, champagne eyeshadows, and glossy finishes for a divine glow

👤 **Makeup artist Leslie Dumeix**

“

2025 will center itself around glowing, hydrated skin, focus on skincare as much as makeup “Dewiness”

 **Amanda Gabbard,**  
celebrity makeup artist

“

Blending the whimsical Charm of '80s Purple blush And glittery eyes with the Rebellious edge of '90s Grunge aesthetics and multidimensional eye looks

 **H. Dewett, National Makeup Artist**  
at House of Beauty, Kylie Cosmetics

- Rapid R&D pivot driven by AI analytics and advanced formulation methods
- Balancing rebellious and traditional elements to shape next-gen Makeup R&D and market strategy.

# Questions leaders must ask

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**When will lab-grown, eco-friendly pigments be as cheap and strong as today's colors?**

Experts say by 2028, but will brands get ready in time?

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**Can heat- or pH-changing formulas become everyday best-sellers within two launches?**

Early tests look good, yet factories aren't set - can they scale fast enough?

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**Can we make base makeup that protects skin bacteria and still covers well all day?**

Lab results show promise, but who will fund big real-world trials?

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**Which simple data tools can predict demand for hard-to-find undertones in new markets?**

AI cuts wasted stock by 18%, but will stores share sales data?

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**How many shops are needed before in-store color printing makes more money than small factory batches?**

Break-even is roughly 150 stores - do we have that reach?

**Talk to our Personal-Care industry experts**



# Meet the minds behind the insights

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**Manoj Jiandani** 

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**Practice Head**

Personal Care

With 25+ years of deep industry experience, Manoj helps global clients in the personal care space navigate emerging trends and transformative shifts.



**Rachit Singla** 

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**Director**

Personal Care

Rachit is a strategic business leader with over 15 years of experience accelerating growth and delivering client success in the personal care industry.

**Schedule your custom insights session**



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