



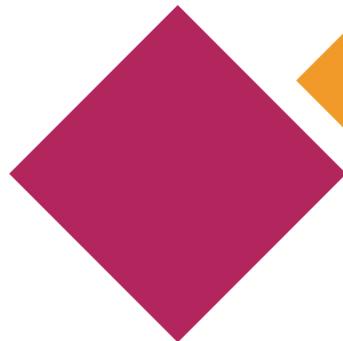
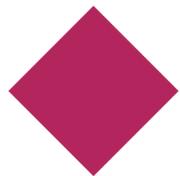
Personal Care

ELEMENTIS

A global specialty chemicals company

SUN CARE TREND 2021

SUNSCREEN BEYOND UV PROTECTION



INNOVATION | GROWTH | EFFICIENCY

SUSTAINABILITY IS KEY

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SUSTAINABILITY IS KEY

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CONSUMERS WANT MORE ACTION FROM BRANDS ON SUSTAINABILITY

In the UK

79%

of adults feel personal care and beauty brands need to put more effort into ethical and sustainable product production

In China

68%

of adults want brands and companies to support environmental sustainability; 42% want more production and product information

In the US

34%

of 18-24 year olds look for brands that have sustainability strategies in place

KEY WORDS LIKE:

SUSTAINABILITY
MINERAL
 BIODEGRADABLE
GREEN
 CLEAN
 OCEAN-FRIENDLY
 BEAUTY
NATURAL
 VEGAN
 ECO-CONSCIOUS
SAFETY
TRENDING ACROSS THE GLOBE

Base: UK: 2,029 adults; China: 3,000 internet users aged 20-49; US: 187 internet users aged 18-24 who purchase clean, natural or organic personal care products

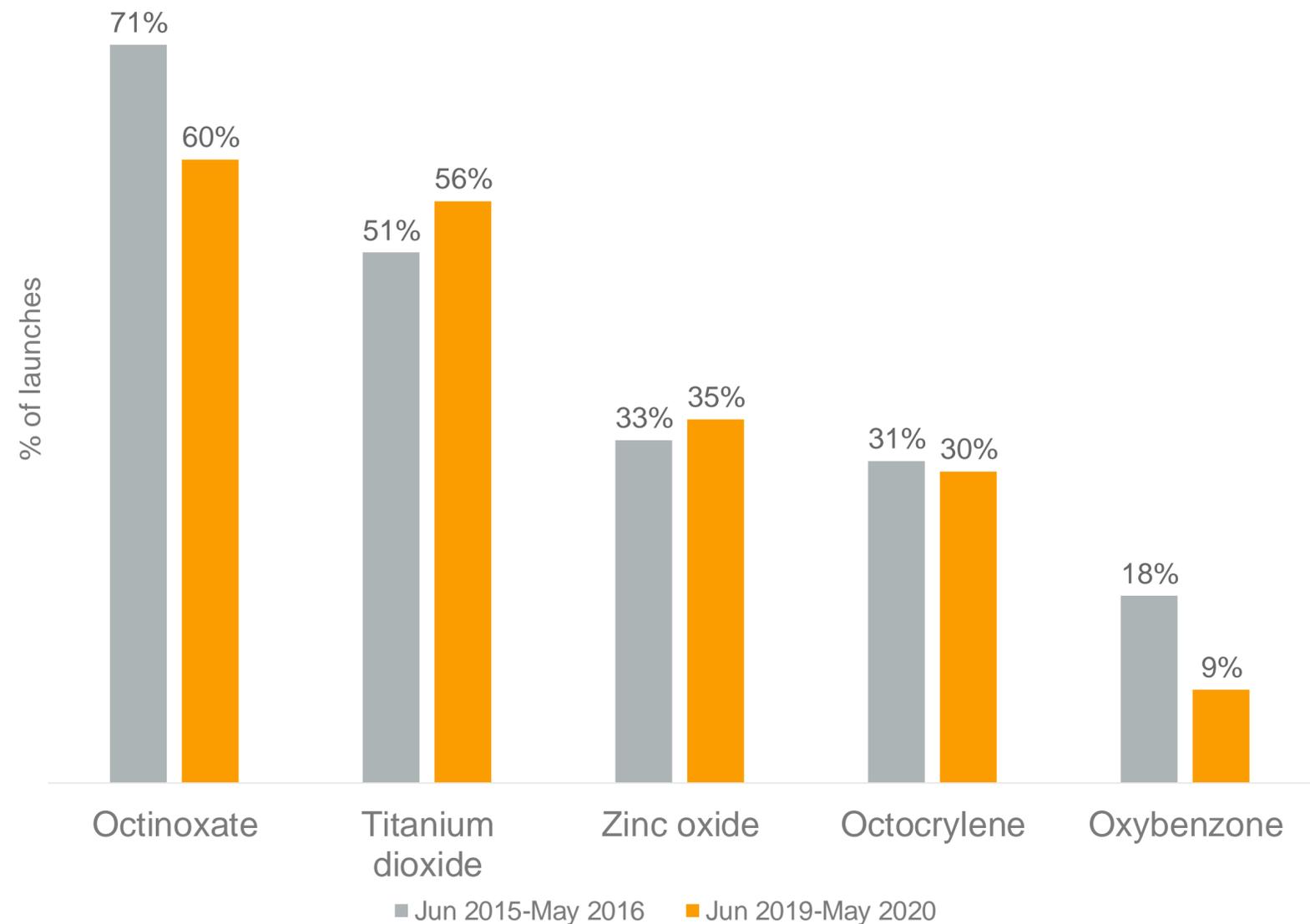
Source: Bloomberg; KuRunData/Mintel; Lightspeed/Mintel

THE RISE OF MINERALS

MINERAL INGREDIENTS CONTINUE TO RISE AND ALIGN WITH NATURAL/SAFETY CONCERNS

- There is an increasing demand for natural, eco and 'safe' sunscreen, hence the rise in mineral ingredients e.g. titanium dioxide and zinc oxide
- Synthetic ingredients are seen to have a significant decrease
- The competition within the mineral sunscreen market is keen; brands and formulators should build a better story around ingredients and benefits to both people and the planet

APAC: SUNSCREEN LAUNCHES BY SELECTED CHEMICAL AND MINERAL INGREDIENTS, 2015-16 VS 2019-20



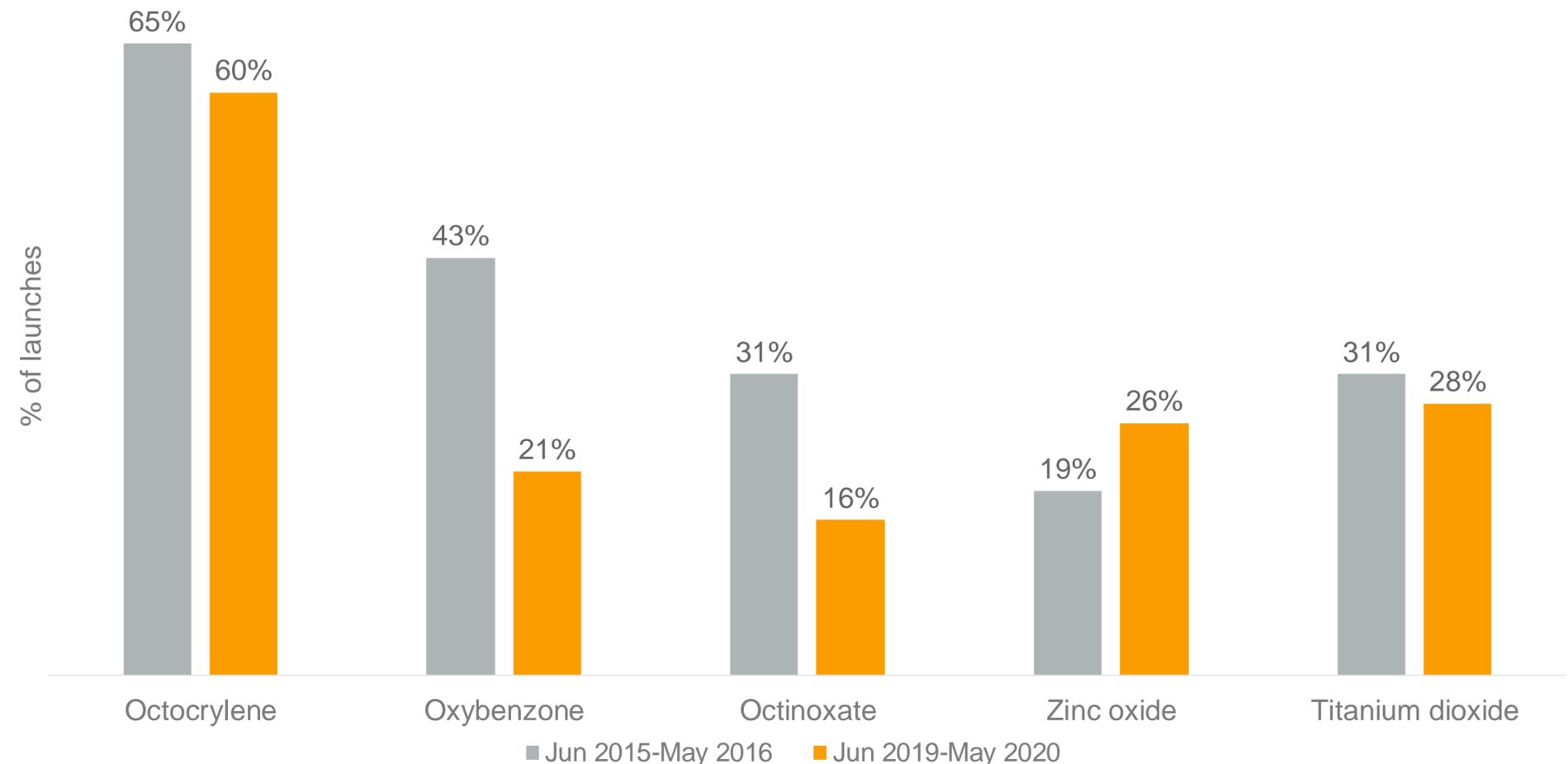
Source: Mintel GNPD

THE RISE OF MINERALS

ORGANIC SUNSCREEN INGREDIENTS DECLINE AS MINERAL ONES RISE/REMAIN STEADY

AMERICAS: SUNSCREEN LAUNCHES BY SELECT CHEMICAL AND MINERAL INGREDIENTS, 2015-16 VS 2019-2020

- Chemical/organic sunscreen ingredients (i.e. octinoxate and oxybenzone) are on the decline in the Americas
- Even the established chemical sunscreen ingredient octocrylene (commonly combined with avobenzone to improve stability and provide a high level of UVA protection) has started to decline, and is banned in the US Virgin Islands (in addition to oxybenzone and octinoxate)
- In contrast, established mineral options show steady NPD activity



Source: Mintel GNPD

MARKETING SAMPLES

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HIGH SPF FORMULATIONS ARE POSSIBLE BUT OFTEN A SENSORIAL CHALLENGE

SEVENTY-ONE ECO SUN SHIELD SPF 50+



PRODUCT BENEFIT CLAIMS

- provides an **SPF 50+**
- very high protection against UVA and UVB rays
- **protects from salt, delivering hydration to take beach life to another level**
- very water resistant and non stinging
- contains 100% mineral filters and natural active ingredients
- dermatologically tested
- manufactured by a company that donates 1% for the planet and retails in a 50ml eco pack.

PRODUCT INGREDIENTS

aqua (water), caprylic/capric triglyceride, zinc oxide, Helianthus annuus (sunflower) seed oil, Titanium dioxide, undecane, glycerin, Zea mays (corn) starch, tridecane, Cera alba (beeswax), polyglyceryl-3 diisostearate, Simmondsia chinensis (jojoba) seed oil, polyhydroxystearic acid, C10-18 triglycerides, parfum (fragrance), stearic acid, magnesium sulfate, palmitic acid, polyglyceryl-2 dipolyhydroxystearate, sodium chloride, alumina, sodium benzoate, citric acid, sodium hydroxide, xanthan gum, potassium sorbate, tocopherol, linalool, coumarin, beta-sitosterol, squalene, geraniol

OUR SOLUTIONS

BENTONE HYDROCLAY™ 2100

ELEMENTIS

A NATURAL FOR VERSATILE FORMULATING

- Light and luxurious skin feel
- Creates flawless looking skin
 - Soft-focus effect
 - Mattifying
 - Moisture retention
- Formulation versatility
 - Cold processable
 - Synergistic with other thickeners
- Provides stability and suspension to low viscosity formulas
 - Heat stability
 - Reduced syneresis

APPLICATION AREAS

- Mineral sun care
- Organic sun care
- Daily wear with SPF
- Color cosmetic with SPF

**Mineral sunscreen formula available soon*



DRY TOUCH MINERAL SUNSCREEN

ELEMENTIS

A NATURAL MINERAL FORMULA WITH BENTONE® LUXE XO AND HIGH OIL PHASE

S-2012-02

67.5% oil phase

BENEFITS

Predicted SPF 25.8, PA +++

High Oil Content utilizing particle suspension in combination with outstanding stabilizing power of BENTONE® LUXE XO to provide a low viscosity lotion

Phase	Ingredient	Supplier	%w/w
A	Dicaprylyl Carbonate (Cetiol CC)	BASF	20.00
	Isoamyl Laurate (Jolee 7750)	Oleon	15.00
B	Zinc Oxide (and) Triethoxycaprylylsilane (Z-Cote HP-1)	BASF	15.00
	Titanium Dioxide (and) Silica (and) Dimethicone (Parsol TX)	DSM	7.5
C	C13-15 Alkane (and) Polyglyceryl-3 Polyricinoleate (and) Disteardimonium Hectorite (BENTONE® LUXE XO)	Elementis	10.00
D	Deionized Water		30.00
	Propandiol		1.00
	Dehydroacetic Acid (and) Benzyl Alcohol (Geogard 221)	Lonza	1.00
	Sodium Chloride		0.50



HIGH SPF PERFORMANCE

ELEMENTIS

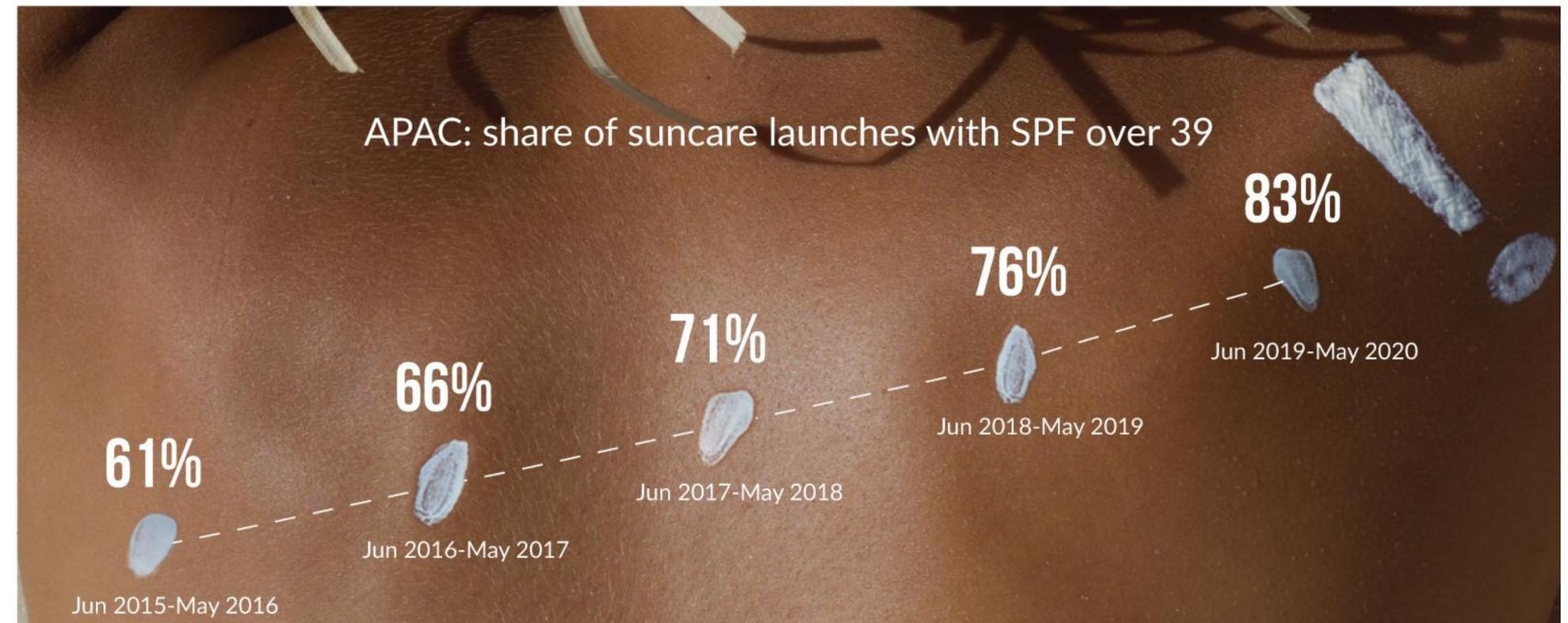
HIGHER SPF PROTECTION

CONSUMERS SEEK SUPER-EFFECTIVE SHIELDING FROM SUN DAMAGE AND SKIN CANCER

MARKET INSIGHTS

- People's awareness on skin protection is higher and they seek more effective protection from sun damage and skin cancer
- The level of SPF protection is on the rise, especially in Asian market
- In China, 52% of facial sunscreen users are concerned that products offer poor protection
- There is a huge market for NPD in this area to address consumer's concern

APAC: SHARE OF SUNCARE LAUNCHES WITH SPF OVER 39 RISES



Source: Mintel GNPD

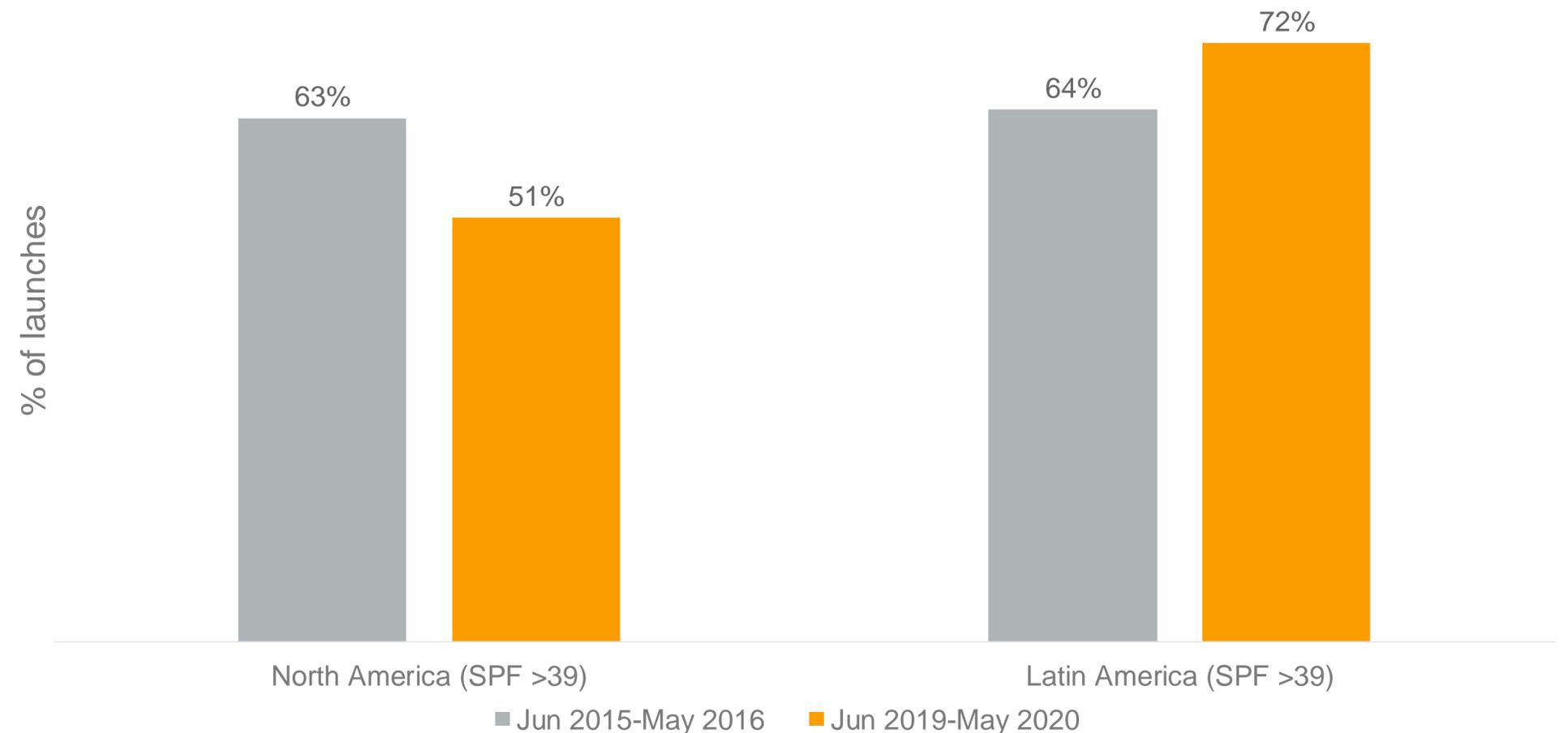
HIGHER SPF PROTECTION

CONSUMERS SEEK SUPER-EFFECTIVE SHIELDING FROM SUN DAMAGE AND SKIN CANCER

MARKET INSIGHTS

- People's awareness on skin protection is higher and they seek more effective protection from sun damage and skin cancer
- The demand of higher SPF protection is on the rise, especially in Latin America
- There is a huge market for NPD in this area to address consumer's concern

AMERICAS: SUNSCREEN NPD WITH SPF HIGHER THAN 39, 2015-16 VS 2019-2020



Source: Mintel GNPD

MARKETING CASE

ELEMENTIS

SHISEIDO ANESSA PERFECT UV SUNSCREEN MILD MILK FOR SENSITIVE SKIN

PERFECT UV SUNSCREEN MILD MILK FOR SENSITIVE SKIN SPF 50+ PA++++



PRODUCT BENEFIT CLAIMS

- provides an SPF 50+ PA++++
- Powered by heat, water and sweat
- UV protection
- **Brightening / illuminating**
- For sensitive skin
- Free from added/artificial colourings
- hypoallergenic
- Mineral oil/petroleum free
- No additives/preservatives
- Non-comedogenic
- Paraben free
- Waterproof

PRODUCT INGREDIENTS

methyl methacrylate crosspolymer, diisopropyl sebacate, dimethicone, water, caprylyl methicone, zinc oxide, cetyl ethylhexanoate, titanium dioxide, pentaerythrityl tetraethylhexanoate, triethylhexanoin, butylene glycol, diethylhexyl succinate, polymethylsilsesquioxane, glycerin, silica, bis-butyl dimethicone polyglyceryl-3, PEG-9 polydimethylsiloxyl ethyl dimethicone, diethylamino hydroxybenzoyl hexyl benzoate, trimethylsiloxysilicate, bis-ethylhexyloxyphenol methoxyphenyl triazine, PEG/PPG-14/7 dimethyl ether, sodium chloride, Paeonia albiflora root extract, dipotassium glycyrrhizate, sodium acetylated hyaluronate, PEG-10 dimethicone, aluminum hydroxide, stearic acid, dextrin palmitate, ethylhexyl triazone, **disteardimonium hectorite**, hydrogen dimethicone, citric acid, sodium citrate, talc, sodium metabisulfite, tocopherol, benzoic acid

OUR SOLUTION

BENTONE® LUXE XO

ELEMENTIS

A MULTIFUNCTIONAL GEL FOR VERSATILE FORMULATING

- Providing SPF boosting effect to reach highest SPF
- Caring and luxurious sensory
 - Water-release effect with hydrating sensation
 - Rich yet velvety skin feel
- Providing more stability to all W/O systems
 - Stabilize high oil system
 - Improve freeze thaw stability for high water system
- Formulation versatility
 - From very high oil to very high water
 - Cold processable

APPLICATION AREAS

- Mineral sun care
- Organic sun care
- Daily wear with SPF
- Color cosmetic with SPF



HYBRID SUN LOTION

SPF BOOSTER

S-2015-02

Phase	Ingredient	Supplier	%w/w
A	Caprylic/Capric Triglyceride (Palmester 3575)	KLK Oleon	19.50
	Octocrylene (Eusolex OCR)	Merck	10.00
	Ethylhexyl Salicylate (Eusolex OS)	Merck	5.00
	Ethylhexyl Methoxycinnamate (Eusolex 2292)	Merck	3.00
B	Zinc Oxide (and) Triethoxycaprylylsilane (Z-Cote HP-1)	BASF	25.00
C	C13-15 Alkane (and) Polyglyceryl-3 Polyricinoleate (and) Disteardimonium Hectorite (BENTONE® LUXE XO)	Elementis	10.00
D	Deionized Water		25.00
	Propandiol		1.00
	Dehydroacetic Acid (and) Benzyl Alcohol (Geogard 221)	Lonza	1.00
	Sodium Chloride		0.50

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72.5% oil phase

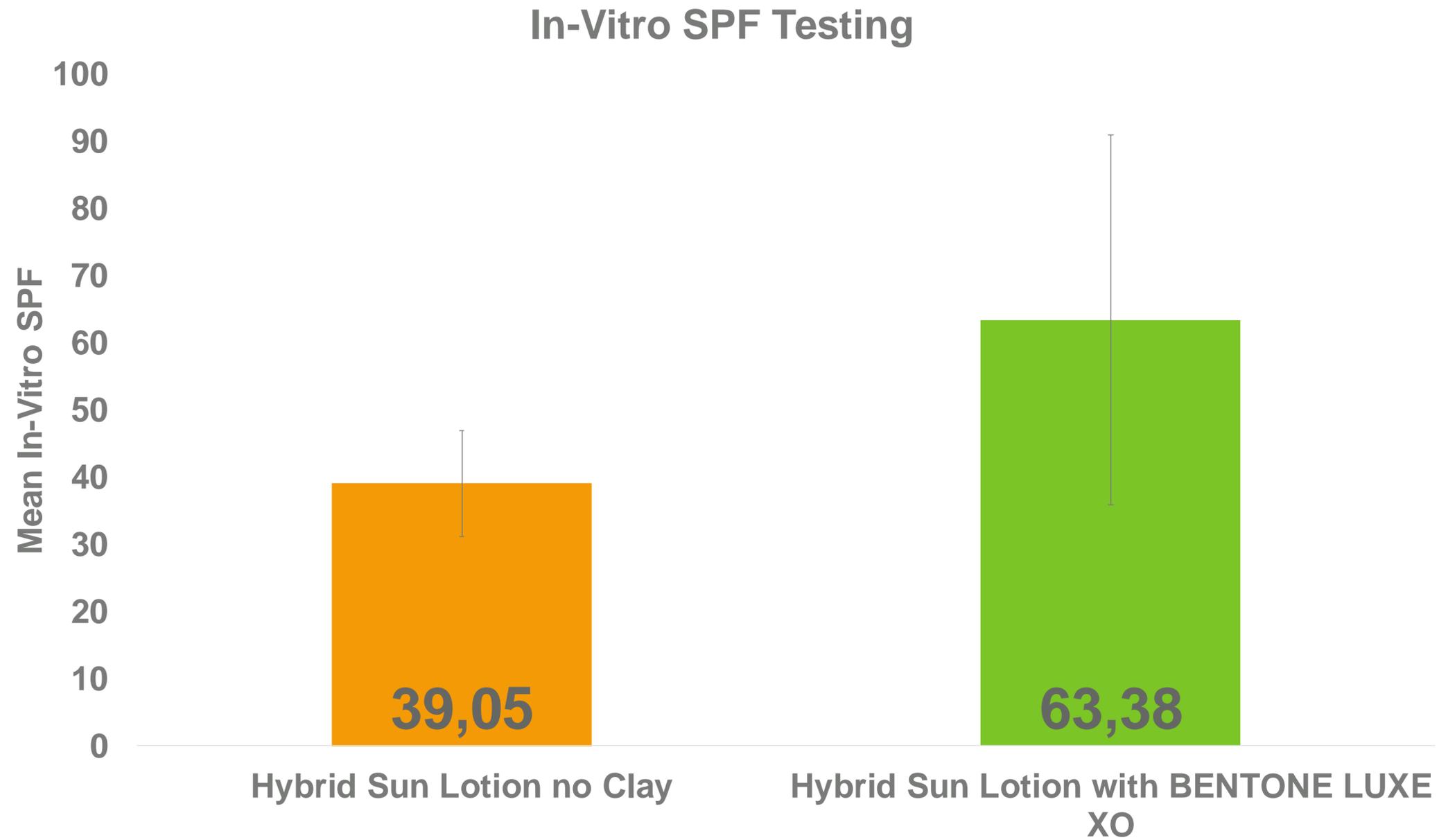
BENEFITS

Stabilizing high amounts of organic UV filters, oils and minerals has never been easier. BENTONE® LUXE XO is a natural when formulating extreme levels of lipophilic ingredients, providing stability and sensory benefits. Particularly the combination with mineral UV filters allows for a pleasant powdery finish.



HYBRID SUN LOTION

IN-VITRO SPT TESTING WITH BENTONE® LUXE XO



MULTI-FUNCTIONALITY ON TREND

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MULTI-FUNCTIONAL SUNCARE/SKINCARE

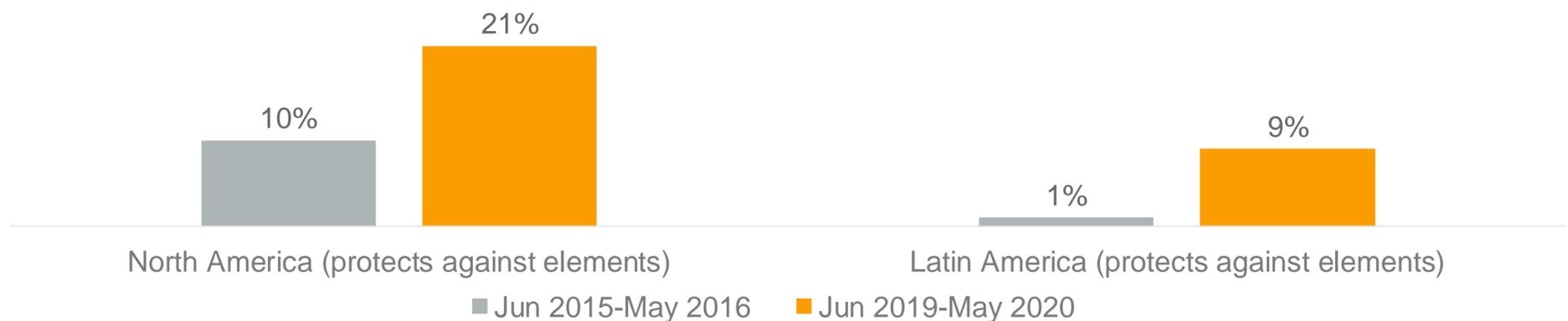
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CONSUMER LOOK FOR PRODUCTS THAT PROVIDE PROTECTION BEYOND UV

AMERICAS: SUNSCREEN NPD WITH PROTECTS AGAINST ELEMENTS' CLAIMS BY REGION, 2015-16 VS 2019-2020

- There is a significant increase in products with protects against elements* claims
- There has been disruptive innovations that offer protection from **jellyfish stings, blue light and pollution** in American market in the last 12 months
- Innovative suncare products specially for hair / scalp has seen an increasing demand in the American market

% of launches



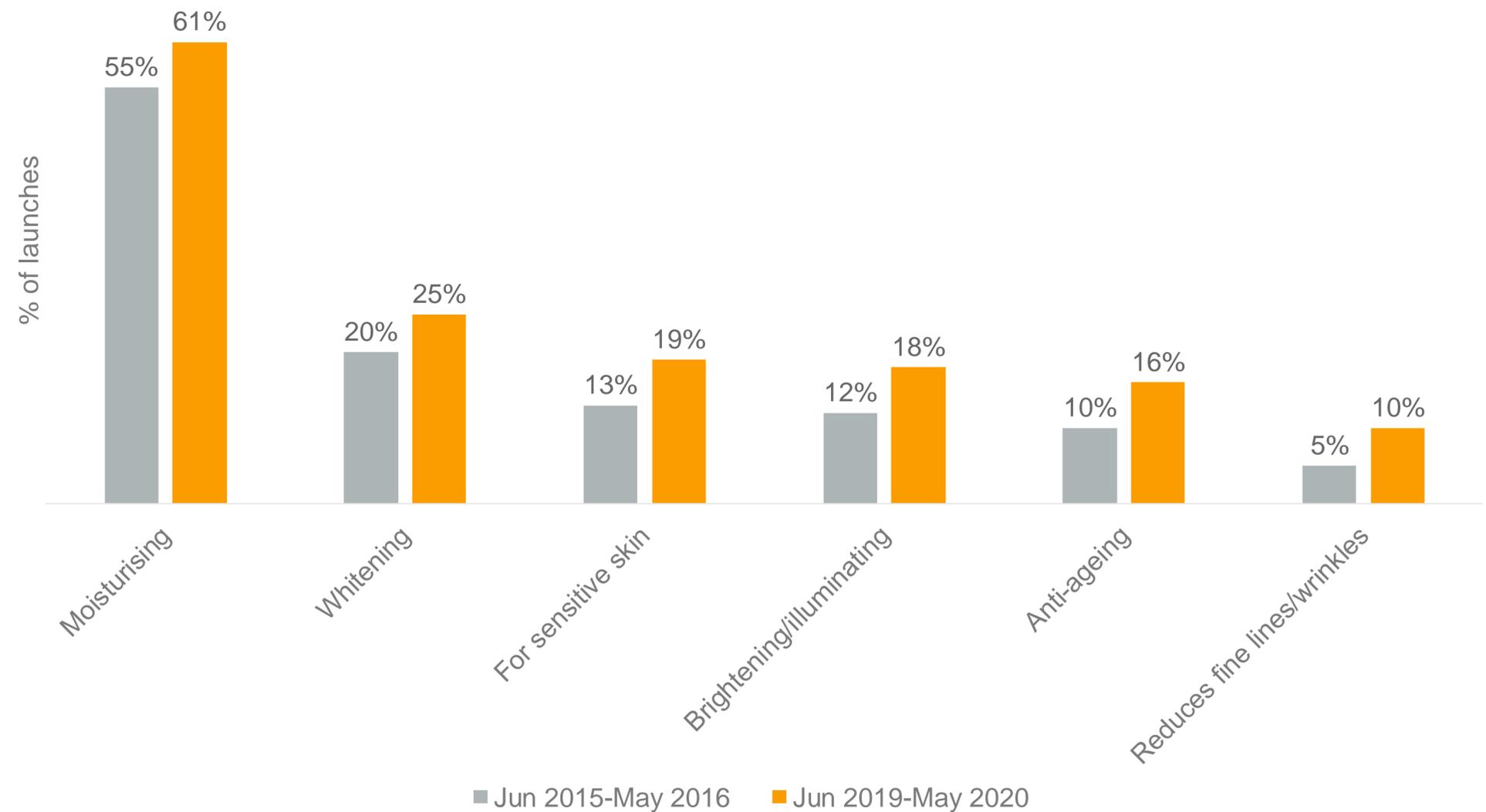
Source: Mintel GNPD

MULTI-FUNCTIONAL SUNCARE/SKINCARE

SKINCARE CLAIMS ARE ON THE RISE

APAC: SUNCARE LAUNCHES BY SELECT FAST-GROWING SKINCARE CLAIMS, 2015-16 VS 2019-20

- As consumer become savvier today, they are seeking products that offer more than just sun protection
- Hybrid suncare/skincare innovations, especially those that tackle skin problem caused by traditional sunscreen e.g. acne are trending
- Skincare claims are prevalent across the globe. In APAC and the Americas sun care market, moisturization claims are on the highest demand, led by 61% and 48% of recent launches respectively



Source: Mintel GNPD

MARKETING SAMPLES

ELEMENTIS

SUN CARE WITH UV AND BLUE LIGHT PROTECTION CLAIM

DERMALOGICA INVISIBLE PHYSICAL DEFENSE SPF 30



PRODUCT BENEFIT CLAIMS

- provide an SPF 30
- Antioxidant
- **For sensitive skin**
- **UV and blue light protection**
- Ease of use
- Free from added/artificial colorings
- Gluten free
- Paraben free
- **Reduce UV-induced redness and dryness**
- **Vegan**

PRODUCT INGREDIENTS

active ingredients: zinc oxide (20%)
inactive ingredients: water (aqua), caprylic/capric triglyceride, C12-15 alkyl benzoate, dimethicone, butyloctyl salicylate, butylene glycol, glycerin, silica, polyhydroxystearic acid, PEG-10 dimethicone, Argania spinosa kernel oil, Cordyceps sinensis extract, trametes versicolor extract, sodium hyaluronate, Camellia sinensis leaf extract, Eucalyptus globulus leaf oil, Lavandula spica (lavender) flower oil, tocopheryl acetate, sodium chloride, **stearalkonium hectorite**, pentylene glycol, lauryl PEG-9 polydimethylsiloxylethyl dimethicone, propanediol, dimethicone crosspolymer, sodium citrate, propylene carbonate, xanthan gum, caprylyl glycol, bisabolol, Lavandula hybrida oil, ethylhexylglycerin, sodium hydroxide, potassium sorbate, sodium benzoate

MARKETING SAMPLES

ELEMENTIS

A MULTIFUNCTIONAL TINTED MOISTURIZER WITH UV PROTECTION

**DOLCE & GABBANA ON-THE-GLOW TINTED
MOISTURIZER SPF 30 PA+++**

PRODUCT BENEFIT CLAIMS

- provide an SPF 30 PA +++
- **Brightening / illuminating**
- Ease of use
- **Long-lasting**
- **Moisturizing / hydrating**
- **UV protection**
- Quick application and effortless blending
- **Natural ingredients**

PRODUCT INGREDIENTS

- water, dimethicone, titanium dioxide, ethylhexyl methoxycinnamate, butylene glycol, propanediol, diethylhexyl succinate, glycerin, nylon-12, PEG-9 polydimethylsiloxy ethyl dimethicone, PEG-10 dimethicone, aluminum hydroxide, disiloxane, diphenylsiloxy phenyl trimethicone, **disteardimonium hectorite**, sorbitan sesquiossearate, stearic acid, phenoxyethanol, polymethylsilsesquioxane, dextrin, EDTA-3Na, dimethicone/vinyl dimethicone crosspolymer, Olea europaea (olive) fruit oil, figs fruit extract, polysilicone-2, talc, tocopheryl acetate, laureth-4, BHT, sodium metabisulfite, sodium hyaluronate, hydrogen dimethicone, tocopherol, iron oxides



OUR SOLUTIONS

ELEMENTIS

BENTONE GEL® GTCC V

HIGH NATURAL INDEX BENTONE GEL®

- Providing highly efficient rheological control
 - Predictable, reproducible and stable viscosity control
 - Shear-thinning viscosity
 - Excellent suspension of pigments and actives
- A sustainable alternative to other thickeners
 - 95% Natural according to ISO 16128
 - Approved under RSPO Mass Balance system
- Formulation versatility
 - A high degree of formulating flexibility
 - Cold processable
 - Highly reproducible results for multi-site production requirements

APPLICATION AREAS

- Clean / Mineral sun care
- Organic sun care
- Natural daily wear with SPF
- Natural color cosmetics with SPF



95% NATURAL



IECIC LISTED

DAILY SKIN DEFENSE LOTION

ELEMENTIS

A NON-GREASY MINERAL SUNSCREEN SERUM

S-2009-03

Phase	Ingredient	Supplier	%w/w
A	Dicaprylyl Carbonate (Cetiol CC)	BASF	20.00
	Dimethicone (KF 96L-2cs)	Shin Etsu	9.00
	Caprylic/Capric Triglyceride (and) Stearalkonium Hectorite (and) Propylene Carbonate (BENTONE GEL® GTCC V)	Elementis	8.00
	Cetyl PEG/PPG-10/1 Dimethicone (Abil EM 90)	Evonik	2.20
	Polyglyceryl-2 Diisostearate (S-Face IS-202P)	Zeal	2.00
B	Zinc Oxide (and) Triethoxycaprylylsilane (Z-Cote HP-1)	BASF	10.00
	Titanium Dioxide (and) Silica (and) Dimethicone (Parsol TX)	DSM	2.00
C	Deionized Water		To 100
	Butylene Glycol		3.00
	Sodium Chloride		0.50
	EDTA-2Na		0.02
D	phenoxyethanol (and) propanediol (and) propylene carbonate (and) caprylhydroxamic acid (and) o-cymen-5-ol (Optithen GP)	Ashland	0.80

BENEFITS

Predicted SPF 14

A light-weight watery sunscreen with good fluidity. BENTONE GEL® GTCC V helps to evenly suspend and distribute the inorganic sunscreen particles in the formula and on the skin as well, resulting in SPF boosting effect.





Thank You!

