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Exploring The Benefits And Opportunities Of Solid Beauty Products



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The solid beauty space has evolved well past the modest bar soap. Formulation and application method innovations in tandem with a surge of eco-conscious shoppers have driven brands to wake up what has long been a sleepy category.

“While liquid body washes and other competing products have entered the market and offered consumers a wide array of alternative cleansers, consumer interest in solid beauty products has returned alongside the growing interest in sustainable product claims and waste/energy reduction,” says Anna Keller, senior global analyst of beauty and personal care for market research firm [Mintel](#).

According to market research firm [The NPD Group](#), sales of prestige skincare in bar, solid and stick formats were valued at around \$3 million in the 12 months ending March 2022,

with sales of prestige solid facial cleansers increasing 15% in the period.

Cleansers are just the tip of the iceberg in the solid beauty space. Moisturizing bars, serums, shampoos, conditioners and perfumes have broken into the solid market over the years, showcasing the expanse and potential of the category.

In this white paper, we will go over the benefits of solid beauty products, areas of opportunity in the category, marketing and formulation challenges brands may face as they venture into the solid arena, and where it’s heading next.

Solid Beauty Benefits

Mintel recently released a global outlook consumer study on sustainability that revealed the majority of consumers believe in climate change. “It’s becoming increasingly important for companies and businesses to address people’s anxieties and take the lead in creating a sustainable future,” notes the study. “Consumers still feel like they can make a difference, but they expect businesses to take responsibility for preventing further environmental damage.”

Solid beauty has advantages from an environmental standpoint. Solid beauty products come in nontraditional compact, solid formats. Their formulas contain little to no water. Water scarcity in many regions of the world—around 1.8 billion people will face water scarcity by 2025, according to United Nations agency UNICEF—is prompting the demand for more conscious use of the resource by companies. Cosmetics often have high concentrations of water, with the ingredient regularly popping up first on INCI lists. The reduction or elimination of water is part of the equation of reducing cosmetics’ water footprint.



Sephora has delved into the solid product arena with the brands Superzero, Viori and Kate McLeod.

Given their solid form and minimal packaging, bar products are highly portable and travel-friendly. The products are a fraction of the size of their liquid counterparts, making them lighter and easier to transport, generating lower emissions. Mintel identifies emissions as another area of concern for consumers. More than 60% of global consumers agree that they “would prefer for companies to reduce their own carbon emissions rather than use ‘Carbon Offsetting’ programs outside of their own area of business.”

Packaging plays a role in carbon emissions, and solid beauty products tend to have less packaging. According to a 2008 report by market research firm Euromonitor International, the beauty industry churns out 120 billion packaging units annually and only a fraction of them will get recycled. Most are landfilled, incinerated or littered, eventually ending up in the ocean. In a lot of cases, solid bars are enclosed in recyclable packaging options like cardboard or tin containers, cutting down or removing plastic altogether.

The Evolution Of Solid Beauty Products

Sara Turchetta, VP of private label at beauty manufacturer Europelab, highlights that new technology, formulation and manufacturing methods have injected innovation into the solid beauty space. She says, “The difficulty of creating a solid facial serum as an example is that, when you apply it, you don’t want it to just sit on the skin epidermal layer, you want to make sure the actives get delivered within the skin for visible long-term results.”

Micro encapsulation is among several technologies that Europelab utilizes for solid beauty products. Other advancements include solid dispersion technology and extraction technology. Turchetta describes micro encapsulation as “a protective shell to shield the ingredients from degradation, so they enhance not only their stability, but it also allows a gradual release of the active ingredients in a controlled way within the skin.” Micro encapsulation can help bring ingredients like vitamins, antioxidants and peptides to the skin.

She adds that the sensorial characteristics of solid beauty products have improved. Turchetta says, “With this evolution came the opportunity to provide products that went beyond haircare and bar soap and include facial serums, more efficacy-driven products using natural and organic-certified ingredients.”

The technologies employed will differ depending on the product’s purpose, ingredient selection and formulation method. Not every manufacturer has the same solid beauty product capabilities. The manufacturer vetting process is important for founders looking to launch or expand into niche categories like solid beauty. Turchetta says, “It’s not only what you use and how you formulate, but what are the methods of manufacturing that could be unique to a lab that will improve efficacy and elevate overall the formulations?”

SCENARIO 1

Developing a Solid Bar Shampoo



CHALLENGES

- **Achieving the right balance of cleansing and conditioning:** Formulating a solid bar shampoo requires striking a delicate balance between effective cleansing and providing conditioning benefits. The challenge lies in selecting the appropriate surfactants and conditioning agents that work synergistically without leaving residue or weighing down the hair.
- **Solid consistency and usability:** Creating a solid bar shampoo with a desirable texture and ease of use is crucial. The challenge is in formulating a bar that is firm enough to hold its shape, but softens and lathers easily when in contact with water. It's crucial to achieve a pleasant sensory experience and ensure that the bar doesn't become mushy or disintegrate quickly.

KEY CONSIDERATIONS

- **Surfactant selection:** Choosing surfactants that effectively cleanse the hair while being mild and gentle is important. Considerations include hair type, desired foam characteristics and compatibility with other ingredients in the formulation.
- **Conditioning agents:** Conditioning agents such as oils, butters or silicone derivatives are selected to provide moisture, detangling and manageability benefits. Considerations include the desired level of conditioning, compatibility with surfactants and the sensory attributes of the product.
- **Structural integrity:** The solid bar shampoo has to be formulated with the appropriate combination of ingredients such as waxes, thickeners or binders to maintain its structural integrity throughout use. The bar shouldn't crumble or become too soft during storage or when exposed to water.

SCENARIO 2

Developing a Solid Facial Serum



CHALLENGES

- **Ingredient compatibility:** Formulating a solid facial serum involves selecting ingredients that are compatible and stable in a solid format. Ingredients such as active botanical extracts, vitamins or specialized skincare actives need to maintain their potency and effectiveness without degradation or loss of efficacy.
- **Absorption and spreadability:** Creating a solid facial serum that melts upon contact with the skin, allowing for easy absorption and spreadability, is a challenge. The formulation needs to strike a balance between solid consistency and the ability to transform into a nourishing serum upon application.

KEY CONSIDERATIONS

- **Active ingredient stabilization:** Selecting ingredients and formulation techniques that ensure the stability and integrity of active ingredients throughout the product's shelf life is essential. The use of encapsulation technology or antioxidants can protect sensitive actives from degradation.
- **Texture and melting properties:** It's critical to balance the texture of the solid serum to ensure it melts upon contact with the skin, allowing for smooth application and absorption. This balance requires the careful selection of oils, butters or waxes with appropriate melting points and skin compatibility.
- **Targeted skincare benefits:** Formulas can be tailored to address specific skincare concerns such as anti-aging, brightening or hydration. The process involves selecting active ingredients and incorporating them in optimal concentrations to achieve the desired efficacy.
- **Packaging considerations:** Choose suitable packaging that preserves the stability and integrity of the solid serum. Light-blocking or airtight containers may be necessary to protect sensitive ingredients from degradation caused by exposure to air or light.

How Brands Can Branch Into The Solid Beauty Space

Keller points out that versatility in the solid beauty space has grown greatly. She lists water-free exfoliating bars, solid shampoo and conditioner bars, “hydration delivery systems” and treatment products as examples. She says, “Fun features like massaging nubs in the bar can be incorporated into product development to make a solid beauty product that performs and will encourage repurchasing.”

Looking at consumer interest in the soap, bath and shower category, Mintel reports that products with a long-lasting fragrance rank high on the list. Keller says, “Fragrance application is a major opportunity in solid beauty and requires innovation in rinse-off fragrance deposition.”

The skinification of body care is an area of opportunity, too, she says, calling out ingredients like niacinamide. “This will propel the need for more ingredient callouts as well as claim substantiation to build trust and enhance education,” says Keller. Turchetta elaborates that multifunctional products like all-in-one balms and facial cleansing bars with exfoliating properties could be sources of growth in the solid beauty category.

Last year, indie beauty brand Ember Wellness launched Sculpt & Glow Bar, a three-in-one bar shaped like a gua sha and intended for the face. Of the product, Turchetta says, “A lot of people were already using highlighting sticks and tools like gua shas, and this provided a quick one-step, all-in-one comprehensive skincare routine, incorporating key skincare actives, shaped and used as a gua sha for benefits including circulation, lymphatic drainage, relaxation and tension, contouring and firming along with enhancing product absorption.” She continues, “There’s going to be some expansion in terms of how to create these new ways of taking care of yourself and making it feel luxurious in a solid format.”



In 2022, 26% of adult haircare users were interested in shampoo and conditioner bars, according to market research firm Mintel. In 2023, 30% are interested in the solid haircare category.

Reimagining products already on the market into unique solid formats is a core strategy for breaking into the solid beauty category. Plastic-free haircare brand Superzero's solid shampoo and conditioners feature a proprietary 360 triflex complex bond building technology similar to the bond building technology made popular by Olaplex.

The brand has newly introduced a frizz-fighting serum treatment bar. Turchetta says, "It is easier to get people to adopt something that they've already seen before, but now it is being redesigned and repackaged to be more multifunctional or more sustainable."

BRANDS LAUNCHED

Indies In The Solid Beauty Space

The infographic is divided into four horizontal sections, each representing a beauty category. Each section features a circular icon on the left and a list of brand logos on the right, all set against a red-to-white gradient background.

- Haircare:** Includes logos for NOLE, GOOD JUJU HERBAL, superzero, VIORI, ethique, and HiBAR.
- Body:** Includes logos for frank body, LINEAR BEAUTY, NOPALERA, and kate meleod.
- Skincare:** Includes logos for ATTITUDE, DEW M T Y, EMBER WELLNESS, and SBTRCT.
- Fragrance:** Includes the logo for FULTON & ROARK, with the tagline "American Fine Fragrance".

Getting Customers On Board With Solid Beauty

Consumer adoption has been slower than the advancements in the solid beauty category. Mintel figures that, in 2022, 38% of adults in the United States had tried body care products in bar form, 30% were interested in trying them, and 32% weren't interested in trying them. In 2022, 26% of adult haircare users were interested in shampoo and conditioner bars. In 2023, 30% are interested in the solid haircare category.

Convincing the modern skincare consumer that solid formulations are an attractive and effective alternative to liquid formulations is crucial for the success of solid skincare, but it can be hard to change consumer habits. Turchetta says, "There is a learning curve for people to get accustomed to going from traditional beauty products to solid formats."

There are limitations from a formulation standpoint as well. "There are still some restrictions as far as certain actives that can be used," says Turchetta. "Solid beauty products are more sensitive to high temperatures, and they can soften or they can even melt in warm environments. There are packaging challenges and hygiene concerns because there's direct contact with the skin."

Turchetta advises brands to lean into the sustainability angle of the solid beauty products and stress they have minimal packaging, lower emissions and are travel friendly, particularly when marketing toward gen Z and gen alpha consumers. According to a Global Voices survey conducted by e-commerce company ESW of more than 16,000 international participants, 70% of younger consumers in the U.S. and United Kingdom are shopping with concern for the environment and 60% of consumers report spending more on a product because it is sustainable.

Partially thrust by environmental concern, Turchetta believes that a less-is-more approach to beauty will persist as a common beauty industry theme. She says, "The market is going towards and will continue to go towards simplicity when it comes to lifestyle in general and that includes skincare routines."

For solid beauty products, to get people further down the learning curve, it's crucial to ramp up consumer education via social media, brand websites and packaging. Turchetta says, "There has to be clear directions as to how they should be applied, how they should be used and proper storage of the products."

The more solid beauty products that hit the market, the more familiar consumers will become with their benefits and usage. Turchetta notes that the more requests Europelab receives to produce solid beauty products, the more automation it can implement from the manufacturing side.

Right now, the solid beauty production process takes longer than the non-solid beauty production process. In turn, solid beauty products can be more expensive depending on the request. "There's beauty in that, though, because it adds a more curated touch to the final product," says Turchetta. "It's an artisanal approach, and in that way, a more intentional process."



The emerging solid haircare brand Dip has found a home in a network of zero-waste stores. Sustainability is a key consideration for consumers interested in solid beauty products.

Case Study: Ember Wellness

When Ember Wellness founder Amanda Schuler decided to branch into solid beauty, a category that she describes as emerging and ripe for disruption, she didn't want to do what everyone else was doing. "A lot of the original solid people started with shampoo bars and conditioner bars, which are amazing, and I personally love them and use them, but no one was really doing anything in the facial skin and the décolletage skin space," she says. "I thought, as a company, it would be amazing to be on the forefront of bars for the



face, and if the facial solid beauty ended up really gaining traction, then that would then open us up to developing products in that space for other parts of the body."

She cycled through numerous iterations of Ember Wellness's bestselling Sculpt & Glow Bar before landing on the final version. She decided to add shimmer to the product by way of mica in order to spark excitement. "As soon as that happened, it was a game changer," she says. Ember Wellness unveiled a Rose Quartz version a year ago and expanded its offerings to Bronze and Sunstone shades earlier this year.

Luxury was the mandate for Ember Wellness's Sculpt & Glow Bar. Its next solid beauty product, a face serum bar, is more results-driven. It will incorporate water-soluble vitamin C. "If you're not a person that is looking for a glow, you're not looking for any kind of makeup derivative, this will be great," says Schuler. She predicts the face serum bar will attract a bigger audience of men than the Sculpt & Glow Bar.

Ember Wellness landed on Europelab as its manufacturing partner for its solid beauty products because the company is located within driving distance of Schuler's home and because of its certifications. Knowing that she wanted to explore solid beauty, Europelab's capabilities, access to melt-and-pour technology and enthusiasm for solid products were draws for Schuler. She says, "You want someone who is like, 'Oh my gosh, this project just sounds like a lot of fun.'"

Providing education on how to use its solid products has been vital for Ember Wellness. Its packaging includes information on proper storage and hygiene practices. The packaging outlines, "We recommend treating the bar as you would your makeup, tools, and anything else applied directly to the skin. Always use it with clean hands on clean skin. It is for personal use only, so do not share with friends. Instead, grab an extra bar for them, it's the perfect gift! Do not add water and keep the bar and tin dry. When replacing with your refill, be sure to rinse and dry the tin out completely before adding the new bar."

Education extends to Ember Wellness's marketing. Its social media accounts are flooded with videos of Schuler and customers using Sculpt & Glow Bar in unique ways. One post shows a woman using a brush to apply the product rather than swiping it on directly. The good thing about the product is there's no wrong way to use it, underscores Schuler. She says, "It has a very intuitive application like you would use a highlighter stick."

Comparing Sculpt & Glow Bar to products consumers are accustomed to like moisturizing and sunscreen sticks—minus the stick element—has been helpful. “There are many ways that we have to tell and retell the story of how to use the product,” says Schuler.

Ember Wellness’s serum bar will require a different approach. Schuler plans on presenting before- and-afters of customers who’ve used the product. It’s been sent out for people to test already to facilitate those before-and-afters.

For fellow founders looking to branch into the solid beauty space, Schuler advises they take a similar route that Ember Wellness has gone down by investigating what’s missing in the solid market. She says, “You need to figure out what is the product that isn’t out there, and what is the problem I can solve?”

She mentions body care is a category with huge potential for solid formats, and posits that there’s potential for delving into a diverse range of solid product shapes. Before launching at Sephora earlier this year, Superzero changed the shape of its bars from primarily standard circles and squares to triangle shampoos and bespoke square conditioners in order to differentiate them from typical soap bars. Schuler recommends founders ensure they can secure intellectual property for the shape they land on. Ember Wellness has a patent for its gua sha-shaped Sculpt & Glow Bar.

“I wouldn’t jump into the category using a traditional soap shape or something like that,” says Schuler. “Weight, size, feel in the hand, these sort of tactile things that perhaps as formulators in the past we haven’t thought about are important to consider. These are all more design fit and intuitive fit than what a bottle looks like.”

Retailers are slowly adopting solid beauty. Sephora has expanded its selection of solid beauty merchandise with the brands Superzero, Viori and Kate McLeod. Ember

Wellness launched solid and non-solid products at C.O. Bigelow this year, and the fashion website Ssense already carries a number of the brand’s products and will carry its solid beauty items by the end of the year, marking its first expansion into solid beauty.

Ember Wellness is stocked by Formula Fig as well. The facial and injectable destination sells Sculpt & Glow Bar in its retail assortment and offers it as an add-on in treatments.

Schuler says, “I hope to see solid beauty become standard fare in the space, where having a solid moisturizing bar on shelf will not be a novel concept anymore.”



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