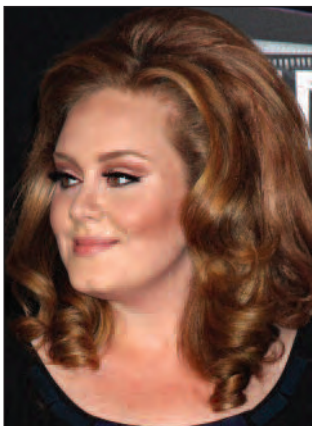


More Than Meets the EYE

Twisted wire brush production
at a Geka facility.

In the tricky mascara market, with consumers showing little brand loyalty and a strong desire for results, trends can change in the blink of an eye—and packaging holds the key to success.

IF YOU'VE FOLLOWED THE RECENT fashion runways or tuned into the Grammys to see Adele sweep open her heavily fringed green eyes when receiving her multiple awards, you're left with no doubt that thick, black eyelashes—whether richly colored or artificially supplemented—top the charts for today's most sought after beauty look.



British recording artist Adele's lashes were in top form as she swept the Grammys.

In the U.S. and around the world, the eyes have it when it comes to cosmetic spending, and with little brand loyalty but great interest in achieving lush lashes, consumers are always on the lookout for products that deliver.

Mascaras lead in both prestige and mass markets as one of the most popular color cosmetics products, and new options launch frequently to keep up with

continuous demand and of-the-moment trends, such as lash growth and enhancement owing to the prescription-based Latisse craze.

Strong Growth

According to research firm The NPD Group, from January through May 2011, sales of mascara rose 11%. Products with benefits—specifically volume and definition—led the category, increasing 17% and 14%, respectively.

Amy Marks-McGee, founder Trendincite LLC, says, "Mascara is a staple—even if you wear no other makeup—it's like lipstick for your eyes. There's an obsession with longer and fuller lashes." Still, she adds, "I can't understand how the brands don't cannibalize each other with their many launches." But, she notes, "Each one offers something different—curling, lengthening, definition; they keep finding another niche. I don't know how consumers decide."

Jill Tomandl, vice president product development, package design, innovation Stila Cosmetics, says consumers aren't interested in restricting themselves to just one mascara. "Stila launches a new, innovative mascara each year

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to continue to add to the consumer's mascara wardrobe," she says. "Women want mascaras with different performance to complete their 'looks.'"

Marks-McGee notes that in addition to volume and definition, current trends also include dual-purpose products, eyelash primers and additive fibers. Minis, too, are quickly becoming big in the market, she says.

From fibrous formulas to heart-shaped brushes, battery-operated wands to airtight mascara pens, standard black tubes to one that resembles a shiny green leaf, the choices are nearly as myriad as the number of lash addicts, so there's always something new to try. And try they will.

According to Mintel's report on Color Cosmetics in the U.S.—July 2011, there is little brand loyalty in U.S. consumers' use of mascara, as 47% of respondents have "never used one brand only." And the search for the "perfect product" continues to fuel the beauty category.

According to Euromonitor statistics for the five-year period from 2005–2010, U.S. mascara sales rose from \$1.3 billion in 2005 to \$1.6 billion in 2010. Globally, they went from \$4.5 billion to \$6.6 billion over the same period, showing worldwide use is on the rise.

Packaging Is Critical

The performance women demand—and take for granted—from their mascara product is not so easy to achieve. From the brand and supplier standpoint, there's a lot of thought and effort surrounding the rod, wiper, brush, tube and formulation—because what's most critical about mascara packaging is that all the components function together smoothly so the end result is attractive, compelling, easy to use and flawless—and lashes appear neither too goopy nor too sparse.

Eileen Higgins, vice president, global product development, Avon, says packaging plays an important role in mascara even though it's a must-have product for most women. She says, "Different than say lipstick and foundation

developments, the packaging for mascara is an integral part of the experience. Mascara development is like a symphony, the rod, wiper, brush and formula have to come together to create the harmonious experience in delivering the lash look. We also see that vibrant, colorful packaging and brushes help to bring the mascara to life and catch the consumer's eye."

Tomandl agrees, saying, "The brush, rod and wiper in combination with the formula are critical to a great mascara. The package can play an important role when it provides benefits such as double-ended components that provide multi-use function."

Component manufacturers, too, put the emphasis on the cohesiveness of all the elements for a successful product. Aurélie Emond, creative and innovation marketing manager Albéa, says, "For us, the main focus for any project we are working on is to reach a perfect combination between the brush, wiper, bottle and formula and that's why we usually customize the wiper, bottle and brush around the formulation that the brand entrusted to us."

Pilar Gonzalez Gomez, VP marketing Geka Group, adds that the correct combination leads to product integrity: "The most important thing to consider is the proof of the claim of a product. The applicators have to be adapted to the delivery system. The components of the packaging and the formulation of the product have to be well-matched to each other."

Otherwise, she warns, "If a product claims to deliver a false lash effect and in the end, the lashes are only slightly curved, the repurchasing rate will be very low, because the claim is not fulfilled. The consumer will not buy this product again, and in the worst case, will share their experience with all their friends and post these on consumer blogs on the Internet."



The new Diorshow mascara, produced by Albéa, follows the mini trend; it's half the size of a typical brush.

Brushes: Big to Small

What a difference a year can make in mascara packaging. While brushes drew the most attention of any mascara component in 2011, and the trend continues in 2012, there have been a number of changes.

At Albéa, Emond says while the use of big brushes with eye-catching design and colors had the monopoly in 2011, 2012 marks the return of fiber brushes with new shapes and colors. She adds: “The big trend of 2012 is also the technicality of the brush. In 2010/11, we saw the mascara with two effects (Two-In-One Mascara), but now it is more about one brush with two effects (for example, Diorshow’s new look).”

Mike Warford, national sales manager for ABA Packaging Corp., who represents OEKAbauty exclusively in North America, also says 2011 was a big year for very big brushes, “and a lot of our sales activities at ABA Packaging on the OEKAbauty mascara lines were focused in this direction. Our colleagues at OEKAbauty in Germany had similar activity and interest.”

However, things can change on a dime.

Warford explains, “We’ve seen a shift both here and in Europe, and the trend now is for small brushes. As OEKAbauty designs and manufactures their own wound brushes they have been able to adapt quickly to this change of market direction. An example of this is the introduction of the OEKAbauty “Delashious Brush.” This recently developed tiny brush gives the consumer the ability to effectively volumize, lengthen and shape every section of the lashes.

Minis have also made a big splash at Albéa, where Emond says precision is “really important now and is the new criteria that counts.” That’s why she says the mini mascara plastic brushes are the new trends. “Brands and consumers are starting to realize that there is no direct link between big brush/volume, that smaller brushes have a lot



of quality, too” (practicality and precision in daily use, no risk to stain the eyelid, the eye corners become reachable without risk of hurting the eye, etc.).

As to materials, Emond says elastomer is both flexible and resistant at the same time, so it’s ideal for plastic brushes, while synthetic fibers are used for fiber brushes. “We also offer some fiber brushes with cotton inside, such as the one we launched with Mary Kay.”

At SeaCliff Beauty Packaging & Laboratories, CEO and president Vonda Simon says they offer a brush that’s both big and small at the same time. “We have a brush that is fatter at the base and thin at the tip for the smaller lashes.”

Warford, too, says OEKAbauty offers brushes that combine small and large bristles. He says they’re seeing “extraordinary interest” in unique brush shapes, which led to the addition of the new Diamond Brush to its stock lines of mascara brushes. “This sophisticated and unique brush shape allows for effective volumizing in the center section while the smaller bristles on the tip allow for great separation and definition,” explains Warford.

At ICS, CEO Sue Nichols says plastic molded brushes are still a hot trend with new and interesting custom shapes being developed each year. “However,” she notes, “we are also seeing a growing trend returning to nylon brushes. For nylon brushes, the biggest trends are big, bushy sizes, wavy shapes used for volume mascaras and tapered shapes for lengthening and separating. Another trend that is growing is for multifunctional brushes such as options with a comb on one side and nylon brush on the other.” And as far as materials? PETG and PET are most popular materials, and some mascaras are moving to PP.

Geka’s Gonzalez Gomez says eye-catching shapes and molded brushes are the most wanted properties of mascara brushes, and that Geka uses a wide variety of brush technologies to achieve them. “There are different brush technologies: molded and twisted brushes. Each of the brushes

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has its advantages and disadvantages. At Geka, we still see a big trend and demand for molded brushes. Geka's core competence is mascara, and thus the development and the innovations are in both areas. Especially in the field of twisted brushes, Geka has many patents not only on the brush itself but also for the fibers/filaments, different cutting technologies, a special fiber-end treatment, wiper, etc." She emphasizes that there is a lot to consider, and thus the entire process has to be taken into consideration during the development of a new brush.

At 3C, Inc., owner and president Lou Della Pesca describes a brush they offer with an unusual handle, which allows the user to make the brush longer or shorter to get

corner or lower lashes. "Just twist and it gets longer, reverse twist and it gets shorter," he says.

It's all about the layered brush at Avon, where Higgins says Avon's SuperShock MAX and SuperShock MAX Waterproof mascaras "feature a helix brush that layers lashes to their very tips. The super-size brush also helps to deliver maximum fullness."


All Bottled Up

While the majority of mascara bottles—and formulations—still lean to classic black, brands continue to test consumer response to brightly colored packaging.

Nichols of ICS, says, "Mascara packaging trends vary de-

New to the Mascara Market

Beauty Packaging surveyed a cross-section of brands, A to Z, to focus in on some of the latest and most innovative mascara products and packaging on shelves now. From adding fibers or supplementing formulations with collagen and keratin, to staggering applicator bristles for maximum coverage, mascara technology has never been greater.

 Avon's Super Extend Extreme Mascara (\$9) features a new dual-extension brush comb, which defines and builds lashes for a full fringe of long shiny lashes.


Benefit's They're Real (\$22) plumps up lashes with claims of a dramatic lengthening and volumizing formula. The secret: A brush with staggered bristles grabs lashes close to the root.



Clinique's High Lengths Mascara (\$15) stars a unique "wallow" wand applicator, which features rows of strategically placed tines to comb through lashes, carefully stretching and separating each lash to new lengths. The "smart" applicator features a green comb applicator, which has one usable side composed of three rows of tines which are always covered with just the right amount of product to comb through lashes. The opposite side of the applicator always appears green, making it easy to recognize which side to use.




Cover Girl Lash Blast 24 Hours (\$7.99) takes the long-lasting approach, promising fabulous lashes for 24 hours with one application.

 Estée Lauder's Sumptuous Extreme Lash Multiplying Volume Mascara (\$23.50) uses a custom big brush in a new shape that offers all the thickening of a brush with the definition of a comb.



Not only is the packaging for Guerlain's Noir G (\$49; refill \$26) innovative and beautiful, it's refillable, too. Plus, it includes a hidden mirror.

 Hypnôse Doll Lashes (\$25), from Lancôme, is right on target with industry buzzwords, says Trendincite's Amy Marks-McGee. Bringing to mind those thick strips of lashes applied to 1960s baby doll lids makes an instant connection with consumers. Seven years in the making, a "unique triple patented brush technology combines with a rich glide-on formula for a 'false doll-lash effect.'" Lancôme's I-Conic Brush is described as "a cone-shaped wand that pushes up lashes with support. A nylon-charged brush smoothly splices through lashes, while a conical tip captures every last one. Homogenously implanted bristles offer ultimate separation so that layering is never clumpy, even for tricky spots like the inner corner of the eye and those baby bottoms."



Big 'N Black is the latest mascara offered by Seaclyff Beauty Packaging & Laboratories.

pending on the market, but a current trend we are seeing globally is the use of bright, metallic colors or bright molded colors for bottle and caps. We are also seeing a trend in using intricate finishes and designs on standard round packaging. Unique decoration on standard packs is being achieved with silk screen, hot stamp and transfer foil in detailed, elaborate patterns.”

Della Pesca of 3C has also seen a trend toward more colorful packages. “Over the past six years or so,” he says, “we’ve seen a lot of metal overshells; plastic with aluminum overshells so brands can blend the item in with the rest of

the line.” Still, he says, while they get more calls for metal than they used to, it’s still not more than plastic.

Nichols adds that while black packaging remains very popular, some brands are adding a new spin to the traditional by customizing the finish in matte black, metalized black and gun metal or soft touch, and adding interesting designs.”

Geka’s Gonzalez Gomez also sees a growing trend in decorating traditional-shaped tubes. She says, “Most of the packs on the market are classical cylinder/round packs, but through different decoration techniques and finishing, every single pack looks different.”

Shape of Things to Come

While the majority of bottles flaunt standard shapes, suppliers are also seeing brands supplementing styles with ad-



Mary Kay’s Lash Love Mascara (\$15)

“contains nourishing ingredients to help moisturize and strengthen lashes while defining, defending and delivering four times the volume.”

Maybelline’s new Illegal Length Fiber Extensions Mascara (\$8.95) claims to “build 4mm of measurable extensions; a fiber-fix brush provides six different contact points with each lash for optimal fiber placement.”



Maybelline New York’s iconic Great Lash Lots of Lashes (\$5.79) now features a heart-shaped elastomer brush that “simplifies the application process. In just one swipe, the Great Little Grabber Brush easily reaches the inner and outer corners of the eye, multiplying and building your lash look with no clumps.”



Physician’s Formula Organic Wear 100% Natural Origin Jumbo Lash Mascara (\$8.99) in a metallized green leaf-like package is noteworthy because it echoes the brand’s natural image, says Marks-McGee.

Rimmel’s Scandal’Eyes Mascara (\$6.99) touts an



ultra volume-boosting formula that features triple the collagen and keratin of other mascaras on the market, and a flexible new MaxDensity brush that’s longer, wider, denser and 50% bigger than Rimmel’s previously biggest brush.



Stila’s Stay All Day Waterproof Volumizing Mascara (\$22) is new for Summer 2012. To educate the consumer in brush use, Stila provides a visual illustration of the brush on the side of the secondary packaging along with a before-and-after illustration of the effect the product has on the lashes.

Tarte’s Amazonian clay line extension into its Gifted Amazonian Clay Smart Mascara (\$19) was clever, says Marks-McGee. The company claims “just as it intuitively restores hydration and balances texture in skin, Amazonian clay intuitively hydrates, replenishes and repairs dry and brittle lashes.” The packaging is made of sustainable bamboo.





packaging with flocking and soft-touch effects.” In the mass market, Emond says the trend is for big bottles with flashy, eye-catching colors.

Nichols also eyes a change in bottle shapes. Recently, she says, the trend for bottle shapes has been for standard round bottles that are either slim or chubby. “We are seeing brands pay more attention to decoration and finish using these standard round shapes. However, there is a trend within the standard round mascara bottle shape and that is for chubby bottles for volume mascaras in both short and tall sizes.” She says they are also seeing requests for tapered mascara bottles and brushes.

Geka’s squareCHIC packaging features a square-shaped package with an eye-catching cap that offers a wide neck diameter (for big volume brushes) and extensive customization possibilities.

Breaking the Mascara Mold

When is a mascara bottle not a bottle at all? When it’s a pen!

Cosmopak broke the mascara mold in Summer 2011 when it released a one-handed airtight mascara pen. Walter Dwyer, CEO and inventor of the new pen, says, “This item is unique in that it revolutionizes the way mascara can be sold.” He explains: “Most mascaras are housed in a bottle with a wand. This reduces the flexibility of the formula range that can be developed as the package is not airtight, and also requires two hands to use.” The new, patented pen from Cosmopak is the result of three years of R&D and, according to Dwyer, is the first of its kind in the market.

Dwyer says, “By separating the applicator from the for-

ditional choices—for both the prestige and mass markets.

For the luxury market, Albéa’s Emond says the trend is for very long and slim bottles decorated with silver, gold and black. She adds, “We are also seeing a trend toward multi-sensorial

mula inside the airtight chamber, we were able to remove the wiper, which is a breakthrough. Additionally, by having a valve, it means we can reduce significantly the viscosity of the formula inside which translates as a new effect on the eyes.” The applicator is a TPE rubber which is very soft on the eyes, and the shape and profile of the applicator can be changed very easily without huge tooling costs, according to Dwyer, who adds, “In principle, the item performs just like a lipgloss pen except it now works for the eyes.”

Battery-Operated Models

When battery-operated mascaras first entered the marketplace, the excitement took the beauty industry by storm. While most of the suppliers interviewed for this article offer a battery-operated model, the buzz about them varies with some manufacturers saying they see lots of interest, while others say requests have waned.

Marks-McGee of Trendincite predicts that even if interest has declined temporarily, it will return. She offers a number of reasons for any current lack of interest. “Battery-operated devices require maintenance. Who has time? The consumers didn’t find the benefit. It didn’t make the application easier, and may have been awkward.” Still, she notes, “It was breakthrough technology and had a definite wow factor.”

At Albéa, rotating mascaras continued to be all the rage, thanks to Dior. In 2011, Albéa created a specific rotating mascara, Diorshow 360°, the first rotating mascara within the luxury market, one that integrates a battery that allows the rotation of the brush with a steady stem. But Albéa’s Emond comments: “It was for sure a major innovation that we are able to offer to our clients, but are the end users ready for it? That’s another question.”

Warford also speculates on the future of the devices. He says, “OEKAbauty was a pioneer in this area and produced millions of custom battery-operated mascaras a few years ago. Although OEKAbauty still actively produces these custom products, sales activity in this area has leveled off somewhat due to changing trends.”

Formulations Flow

While most formulations remain black, there are some variations.



Qosmedix produces a wide variety of disposable mascara wands, which can be used for hygienic sampling.

Della Pesca of 3C finds, “Black is still by far the most popular.”

Emond agrees, saying that black accounts for 90% of the launches at Albéa with the remaining 10% showcasing blue, brown, green and prune shades. But black, too, can deviate. “We also are now noticing a competition around the level of black in formulas,” says Emond. “Some brands are now proposing an ‘Intense Black’ formula or ‘more black than black’ mascara.”

And as far as different textures, Emond says the latest trend is the wet effect or vinyl look.

At Stila, Tomandl says the brand launched the first swirl mascara: Black Diamond Mascara. Two colors are filled with swirl technology into a clear bottle creating a visually impactful effect. Black creates a foundation and silver or blue creates a metallic effect on the lashes.

Disposable Brushes

Whatever the formulation, consumers like nothing better than to be able to sample the product before purchasing. This is where Qosmedix fills the bill.

Kelly Herrera, product development manager, says Qosmedix produces a wide variety of disposable mascara wands, which can be used by cosmetic manufacturers and beauty retailers to maintain a hygienic sampling environment. “We also offer disposable and professional mini fan

brushes that are typically used by makeup artists to apply mascara in lieu of a disposable wand,” she says.

The company also offers sampling sizes—a 3.5ml vial with mascara applicator and an 8ml tube with mascara applicator and reducer. “These items are a great way to sample mascara or to create travel sizes for your larger brand counterparts,” says Herrera.

Qosmedix also offers a variety of unique shapes. “The most popular,” says Herrera, “is our Sphere Shaped Mascara Wand, which allows you to apply mascara to individual upper and lower lashes. Other shapes include spiral, curved, hourglass and tapered. We are also developing a lower lash mascara wand. This wand will allow the artist to apply mascara more precisely to the lower lashes.”

Multi-tasking Mascaras

Whether carried out in two-in-one products, one brush with multiple functions or another dual purpose, multi-functional packaging is hot. Nichols of ICS says this is a trend across all categories and it’s also a trend in mascaras. In addition to double-ended mascaras, which can be used for multiple formulations, ICS also offers some new innovation for multi-purpose mascaras. One such product is a unique duo mascara and eyeliner pack, which has the eyeliner applicator and vial inside the mascara stem. “This item has a special extra thick mascara brush and matching wiper great for volumizing and lengthening,” says Nichols. “The eyeliner has two applicator options; a brush or felt tip.”

Trendincite’s Marks-McGee also sees multifunctional packaging as the future focus of mascara products. “In the end,” she says, “It’s all about the wand. It seems like the wands focus on one or two benefits—such as volume and definition or curl. She says, “I anticipate companies will make a wand and formula that work together to do it all—volume, definition, curl, fullness.” As far as formulations, she predicts that mascaras will focus more on multiple benefits, incorporating high-tech hair and skin care ingredients to offer benefits such as quicker drying time, heat resistance, keratin straightening, moisturizing, priming and even growing lashes. *b.*



ICS offers a unique dual mascara and eyeliner pack which has the eyeliner applicator and vial inside the mascara stem.