

O & 3

# Wellness In Beauty & Personal Care

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Trend Report 2026

# In 2026

The beauty and personal care landscape continues to evolve toward wellness-focused, ingredient-led product development.

O&3

O&3 partners globally with formulators, founders and R&D to translate functional ingredients into sensorially compelling products. Across these conversations, several consistent patterns are emerging:



**Ingredients must provide demonstrable function**



**Sensory experience now influences performance through routine consistency**



**Sustainability is operational rather than aesthetic**



**Multi-functional products are reducing SKU complexity**



**Fragrance is shifting toward skin-close, personal scent identity**

# What is Driving Consumer Habits in 2026?

Our 2026 trends sit within a wider landscape of macro trends shaping how consumers think about beauty, wellbeing and the role of ingredients. These cultural, scientific and behavioural shifts are redefining what people expect from their routines.



<b>Macro Trends</b>	These macro trends are not only reshaping how consumers choose and use beauty products, they are also redefining the use of ingredients themselves.
<b>The Facification Of Body Care</b>	Body care is no longer secondary – it is becoming skincare.
<b>Biohacking &amp; Nutricosmetics</b>	Beauty, metabolism and nervous system regulation converge.
<b>Bio-Intelligent Skincare &amp; Metabolic Beauty</b>	Focus shifts from anti-ageing to efficiency, repair and cellular optimisation.
<b>The Scalp Biotics Mandate</b>	Scalp care is elevated to the same standard as facial skin.
<b>Longevity As The Goal</b>	Focus shifts from youthfulness to longevity and resilience.
<b>Imperfection As Luxury</b>	The most desirable aesthetic now is effortless, lived-in, personal.

# The Evolving Landscape of Beauty and Wellness

Wellness is now defined by biological function, sensory reward and formulation efficiency. The priority is not more steps or more actives, but products that feel good, work consistently and fit seamlessly into real daily life.

This report outlines the six key product development trends for 2026, informed by formulation behaviour, consumer usage patterns and ingredient sourcing dynamics.

Our **O&3 2026 Ingredient Playbook** has more info on formulation planning, sensory design and product architecture



- 1. **Barrier-supporting formulations**
- 2. **Lightweight, comfortable textures**
- 3. **Multi-functional product architectures**
- 4. **Climate-resilient botanicals**
- 5. **Circular and upcycled ingredient sourcing**
- 6. **Oil-based personal fragrance systems**



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Our six trends reflect this evolution...



Trend **1.**

# The Personal Barrier



Trend **1.**

# The Personal Barrier

## Adaptive Care for Modern Lifestyles

### Barrier Care Becomes Situational and Adaptive

As lives feel faster and more demanding, the skin barrier has become a symbol of inner stability. Consumers don't just want skin that looks good - they want skin that feels calm and protected, particularly in the face of stress, environmental change and sensitivity flare-ups. Barrier care is rising because it speaks to our desire for safety, balance and consistency in a world that can feel unpredictable.

Barrier integrity is now a primary marker of overall skin health. The conversation has shifted from universal barrier repair to adaptive, situational barrier support, shaped by stress, sensitivity and environment. Consumers are choosing daily-wear oils that provide lipid replenishment without heaviness.



### 0 & 3 Ingredient Heroes

Ingredient	Role	Functional Attributes
<b>Oat Oil</b> the barrier recovery oil	Supports ceramide pathways	Calms & reinforces
<b>Hemp Seed Oil</b> the lipid balancing oil	Replenishes linoleic acid	Lightweight daily wear
<b>Rosehip Oil</b> the renewal oil	Supports surface recovery	Best for night treatments, regenerative
<b>Meadowfoam Seed Oil</b> the moisture lock oil	Reduces TEWL	Stable, lightweight barrier support
<b>Jobba Oil</b> the skin-mimicking oil	Biomimetic lipid structure	Highly tolerable base, lightweight
<b>Tamanu Oil</b> the repair & recovery oil	Calms inflammation	Supports barrier repair, regenerative

**76%**

of global facial skincare users now associate a healthy skin barrier with overall skin health, not just hydration



Source: Mintel Facial Skincare Consumer Study, 2025.

## Formulation Focus

- **Linoleic-rich** seed oils for lipid replenishment
- **Non-occlusive** hydration systems
- **Low-aroma profiles** for sensitivity compatibility
- **Phytosterols & tocopherols** for recovery signalling

Trend

2.

## Sensorial Wellness

Trend **2.**

# Sensorial Wellness

## Texture As Function

### Texture Drives Routine Consistency and Performance

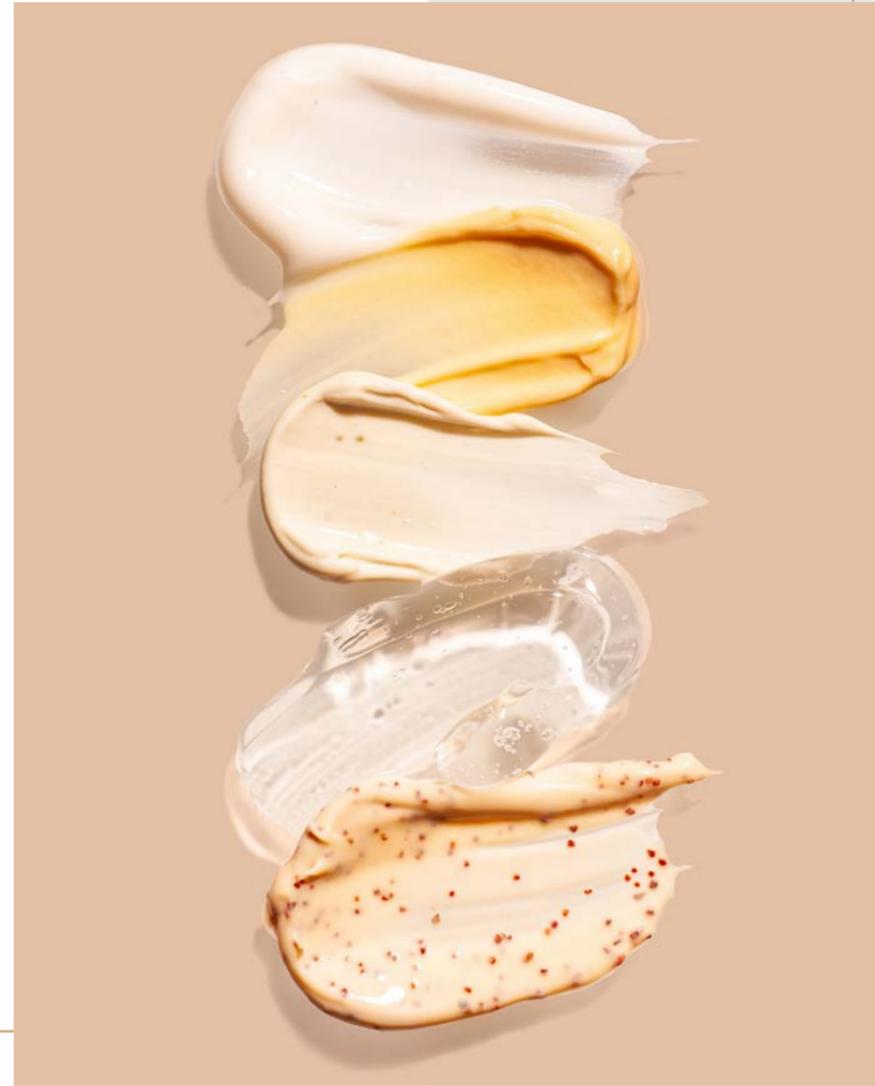
Consumers are choosing products that make them feel good in the moment, not just promise results later. Texture has become wellness: the glide, warmth and softness of a product creates a sense of comfort, grounding and presence. In a world of overstimulation, sensorial products offer a pause and a way to reconnect to the senses and the self. Products that feels good are used more consistently, and consistent use drives outcomes.



**37%**

of body care users cite texture and skin feel as their primary decision factor.

Source: Mintel Bodycare Market Report, US, 2025.



### Sensory Performance Priorities

- Lightweight slip without residue
- Controlled drydown
- Layer-friendly finish
- Low-fragrance, natural aromatic cues

### 0 & 3 Ingredient Heroes

Ingredient	Sensory Role	Key Attribute
<b>Olive Squalane</b> the weightless cushion oil	Smooth finish	Non-greasy hydration
<b>Watermelon Seed Oil</b> the fast absorption oil	Ultra-light feel	Humid-climate compatible
<b>Passion Seed Oil</b> the sensorial brightness oil	Soft natural aromatic lift	Emotional warmth
<b>Vanilla CO<sup>2</sup></b> the comfort aromatic	Calming emotional cue	Micro-dose sophistication, comforting
<b>Babassu Oil</b> the feather-light oil	Fast absorbing, silky feel	Non-greasy, ideal for daily use
<b>Kokum Butter</b> the firm glide butter	Solid yet soft application	Slow melting, luxurious texture

Trend

3.

# Functional Minimalism



Trend **3.**

# Functional Minimalism

## Fewer Products, Higher Purpose

People are tired of managing complicated routines and overflowing bathroom shelves. There is a shift toward clarity, ease and purpose - fewer products, used more consistently, trusted more deeply. Functional minimalism grows from a cultural desire to reduce noise and simplify life, where every product must earn its place by doing more with less.

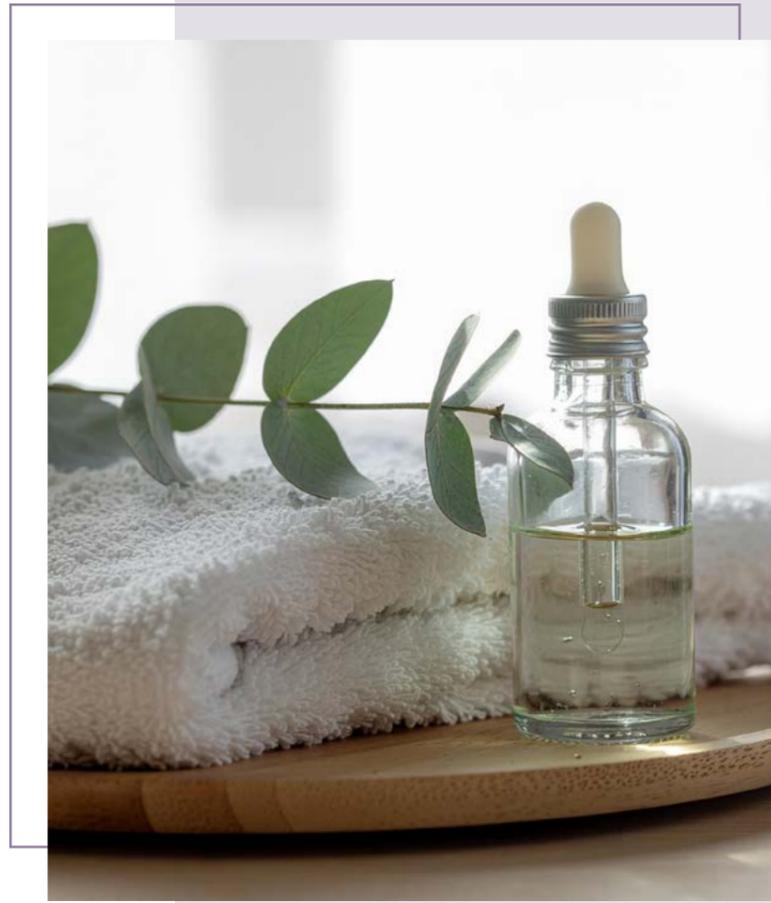
Consumers are simplifying routines and favouring multi-benefit products that replace multi-step regimens. Each SKU must justify its place.



**42%**

of consumers report simplifying routines by using fewer, multi-benefit products

Source: NPD Group, 2025



## Consumer Motivation

- Reduce decision fatigue
- Fewer but better products
- Clear, purposeful use cases

## 0 & 3 Ingredient Heroes

Ingredient	Role	Why It Fits Minimal Routines
<b>Camellia Oil</b> the universal care oil	Hydrates across skin & hair	One-step daily care
<b>Apricot Kernel Oil</b> the gentle multi-tasker	Softens & conditions	Reliable everyday simplicity
<b>Marula Oil</b> the elasticity & shine oil	Nourishes & smooths	Works for face, body & hair
<b>Prickly Pear Seed Oil</b> the antioxidant glow oil	Supports elasticity	Delivers impact in a single step
<b>Fractionated Coconut Oil</b> the flexible carrier oil	Enables multi-format systems	Neutral, travel-ready
<b>Murumuru Butter</b> the protective & softening butter	Shields & softens	Build multi-use balms with minimal extras

Trend

4.

# Plant Intelligence & Climate-Adaptive Ingredients



Trend **4.**

# Plant Intelligence and Climate-Adaptive Ingredients



## Resilient Botanicals for Stressed Skin

Consumers are increasingly drawn to ingredients with inherent resilience - plants that survive extreme climates, scarce water and harsh environments. These ingredients feel wise and trustworthy, reflecting a belief that nature has already solved many of the challenges we face. This trend grows from the wish to feel adaptive, grounded and supported in a rapidly changing world.

Botanicals that survive drought, heat and harsh climates develop protective lipid systems relevant to stressed skin.



## Formulation Signals

- Rich, protective oils suitable for stressed skin
- Lightweight, daily wear textures
- Ingredients with strong origin and survival narrative

## 0 & 3 Ingredient Heroes

Ingredient	Resilience Context	Functional Role
<b>Kalahari Melon Seed Oil</b> the resilience oil	Desert survival	Lightweight replenishment & hydration
<b>Baobab Oil</b> the longevity oil	Extreme age & drought tolerance	Softens dryness & strengthens skin elasticity
<b>Marula Oil</b> the elasticity oil	Drought-adapted	Smooth, velvety conditioning
<b>Moringa Oil</b> the urban shield oil	Pollution tolerance	Delivers oxidative stability & long lasting moisture
<b>Sea Buckthorn Pulp Oil</b> the recovery oil	Sub-zero survival	Supports skin recovery & delivers antioxidant density
<b>Cacay Oil</b> the skin renewal oil	Collected from resilient forest ecosystems	Supports renewal, with natural retinoid-like activity



TREND 1.

TREND 2.

TREND 3.

TREND 4.

TREND 5.

TREND 6.



Trend

5.

## Circular & Upcycled Ingredient Sourcing

Trend **5.**

# Circular & Upcycled Ingredient Sourcing



## Resource Efficiency as Supply Strategy

Today's consumer values responsible practicality - using what already exists, reducing waste and making efficiency feel beautiful. Upcycled ingredients resonate because they reflect a mindset shift: value comes from intelligence, not excess.

Upcycling now supports supply stability, cost control and traceable sourcing, not just sustainability messaging.



**62%**

of consumers prefer brands that upcycle or reduce waste in sourcing



Source: GlobalData, 2025

## Why Consumers Care

- Preference for efficiency over abundance
- Desire for transparent sourcing
- Less appetite for over-produced hero crops

### 0 & 3 Ingredient Heroes

Ingredient	Source Stream	Functional Role
<b>Tomato Seed Oil</b> the antioxidant recovery oil	Tomato processing waste	Brightening & recovery
<b>Raspberry Seed Oil</b> the lipid-rich radiance oil	Juice industry by-product	Glow & support
<b>Plum Seed Oil</b> the lightweight conditioning oil	Food industry by-product	Lightweight hydration & skin conditioning
<b>Coffee Seed Oil</b> the revitalising recovery oil	Roasting by-product	Antioxidant support & sensory richness



Trend

6.

## Oil-Based Fragrance Systems



Trend **6.**

# Oil-Based Fragrance Systems



### *Fragrance Worn for Yourself, Not the Room*

The era of perfume as a loud announcement is fading. People want fragrance that feels personal, intimate and emotionally grounding — something worn for themselves, not others. Oil-based scent speaks to the desire for closeness, subtlety and self-connection, where fragrance becomes part of one's inner life, not a performance.

Oil-based fragrance formats support skin-intimate scent, emotional grounding and personal ritual.

## 0 & 3 Ingredient Heroes

Ingredient	Sensory Role	Wear Style
<b>Clary Sage Essential Oil</b> the balancing herbal	Herbaceous, calming, clarifying, slightly floral	Skin-close, personal wear. Pulse-point or layering; adds aromatic complexity
<b>Rose Geranium Essential Oil</b> the uplifting floral	Skin-close, uplifting, fresh floral aroma	Subtle, personal diffusions, pulse point application
<b>Neroli</b> the bright lift	Emotional resonance	Top note accent
<b>Shea Butter</b> the solid fragrance base	Soft balm texture	Anchors fragrance, moisturises

**87%**

of global consumers want functional benefits from fragrance (emotional or physical)



Source: International Flavours & Fragrances (IFF)



# Our Perspective

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The trends outlined here reflect the convergence of function, sensory experience and supply resilience in beauty product development. O&3 supports formulators, R&D teams and founders with ingredient selection, sensory profiling, scale-up guidance and practical product advice.

*“People want products that feel good, work well and fit naturally into their lives. That means thoughtful ingredients, textures that support daily ritual, and formulations designed for consistency. Our role at O&3 is to help make that possible - partnering with brands to develop products that are both technically effective and a pleasure to use”*

Thomas Kerfoot, Co-Founder, O&3



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## Ingredient Playbook — 2026 Edition

A quick-reference guide for formulation planning,  
sensory design and product architecture.



## The Personal Barrier

Ingredient	Category	Primary Benefit	Functional Attributes	Sensory Profile	Ideal Use Cases	Notes for Formulators
Oat Seed Oil	Refined	Supports barrier integrity	Calms & reinforces	Lightweight, silky	Facial oils, barrier creams	Stable, low-odor; compatible with sensitive-skin formulas
Hemp Seed Oil	Cold Pressed / Refined/ Organic	Lipid balancing	Replenishes linoleic acid	Smooth, non-occlusive	Daily moisturisers, face & body oils	Works well in emulsions and anhydrous products
Rosehip Seed Oil	Cold Pressed / Refined/ Organic	Renewal	Supports surface recovery	Light, slightly dry-touch	Night treatments, regenerative oils	Sensitive-skin compatible; pair with antioxidants
Meadowfoam Seed Oil	Refined	Moisture lock	Reduces TEWL	Soft, velvety	Barrier oils, serums	Highly stable; long shelf-life
Jobba Oil	Cold Pressed / Organic	Skin-mimicking	Biomimetic lipid structure	Smooth, non-greasy	Carrier oil, base for actives	Excellent blending oil; stable
Tamanu Oil	Cold Pressed / Organic	Repair & recovery	Calms inflammation	Medium weight, slightly viscous	Night treatments, adaptive oils	Anti-inflammatory; blends well with other oils



## Sensorial Wellness

Ingredient	Category	Primary Benefit	Functional Attributes	Sensory Profile	Ideal Use Cases	Notes for Formulators
Olive Squalane	Oil	Weightless hydration	Smooth finish	Silky, non-greasy	Facial oils, lightweight moisturisers	Layer-friendly; stable
Watermelon Seed Oil	Refined	Fast absorption	Ultra-light feel	Feather-light, dry-touch	Body oils, humid climates	Layer-friendly
Passion Seed Oil	Cold Pressed Organic / Refined	Sensorial brightness	Soft aromatic lift	Silky, natural fragrance	Facial oils, day oils	Mild aroma; supports emotional wellness
Vanilla CO <sup>2</sup>	Extract	Comfort aromatic	Calming emotional cue	Smooth, warm	Balms, massage oils	Pair with floral and herbal notes
Babassu Oil	Refined / Organic	Feather-light glide	Fast absorbing, silky feel	Non-greasy	Body lotions, multi-use sticks	Compatible with emulsions
Kokum Butter	Butter	Firm glide	Solid yet soft application	Slow-melting, luxurious	Balms, whipped textures	Stable; complements other solid fats
Sheanut Butter	Butter Refined / Butter Unrefined / Organic	Creamy sensory	Soft, indulgent texture	Emollient, smooth	Body creams, facial balms	Highly emollient; anchors fragrance



## Functional Minimalism

Ingredient	Category	Primary Benefit	Functional Attributes	Sensory Profile	Ideal Use Cases	Notes for Formulators
Camellia Oil	Cold Pressed / Refined / Organic	Universal care	Hydrates skin & hair	Light, silky	Facial oils, hair oils	Neutral scent; blends well
Apricot Kernel Oil	Cold Pressed / Refined / Organic	Gentle multi-tasker	Softens & conditions	Light, smooth	Everyday moisturisers	Versatile; suitable for sensitive skin
Marula Oil	Cold Pressed / Refined / Organic	Elasticity & shine	Nourishes & smooths	Silky, slightly rich	Face, body, hair	Stable; excellent oxidative profile
Prickly Pear Seed Oil	Cold Pressed / Refined / Organic	Antioxidant glow	Supports elasticity	Light, dry-touch	Facial oils, multi-use serums	Premium ingredient; blend sparingly
Fractionated Coconut Oil	Oil	Flexible carrier	Neutral, travel-ready	Smooth, non-greasy	Multi-format oils, fragrance carriers	Compatible with essential oils
Murumuru Butter	Butter / Refined Butter	Protective & softening	Shields & softens	Smooth, rich	Balms, multi-use sticks	Emollient; multi-use
Mango Butter	Butter / Organic	Nourishing everyday	Softens & conditions	Creamy, rich	Body butters, lip care	Melts easily; multi-functional
Avocado Oil	Cold Pressed / Refined / Organic	Deep restorative	Hydrating & restorative	Medium weight	Facial oils, night creams	Rich in oleic acid; blends well



## Plant Intelligence & Climate-Adaptive Ingredients

Ingredient	Category	Primary Benefit	Functional Attributes	Sensory Profile	Ideal Use Cases	Notes for Formulators
Kalahari Melon Seed Oil	Cold Pressed / Organic	Resilience	Lightweight replenishment & hydration	Silky, dry-touch	Facial & body oils	High oxidative stability
Baobab Oil	Cold Pressed / Organic	Longevity	Softens dryness & strengthens elasticity	Medium, velvety	Anti-ageing oils, body oils	Absorbs well; heat-stable
Marula Oil	Cold Pressed / Refined / Organic	Elasticity	Smooth, velvety conditioning	Silky, rich	Hair, face, body	Stable; multi-functional
Moringa Oil	Cold Pressed / Organic / Refined	Urban shield	Oxidative stability & long-lasting moisture	Medium, non-greasy	City skincare, anti-pollution	Excellent carrier oil for actives
Sea Buckthorn Pulp Oil	Cold Pressed / Organic	Recovery	Supports skin recovery & antioxidant density	Rich	Regenerative oils, serums	Pair with lighter oils
Cacay Oil	Cold Pressed	Skin renewal	Natural retinoid-like activity	Light, silky	Anti-ageing oils	Sensitive-skin friendly
Safflower Oil	Cold Pressed / Organic / Refined	Lightweight hydration	Antioxidant support	Light, smooth	Facial oils	Blends well with other oils



## Circular & Upcycled Ingredient Sourcing

Ingredient	Category	Primary Benefit	Functional Attributes	Sensory Profile	Ideal Use Cases	Notes for Formulators
Tomato Seed Oil	Cold Pressed	Antioxidant recovery	Vitamins A, C & E, emollient, barrier support	Smooth & lightweight	Serums, moisturisers, facial oils	Stable in formulations
Raspberry Seed Oil	Cold Pressed / Organic	Barrier support & antioxidant protection	Omega 3 & 6, vitamin E, anti-inflammatory	Lightweight, fast absorbing	Facial oils, serums, after sun care, hair oils	Supports sensitive & stressed skin
Plum Seed Oil	Cold Pressed / Organic	Nourishment & rejuvenation	Essential fatty acids, antioxidant protection	Silky, fast-absorbing	Moisturisers, serums, hair oils	Blends well
Coffee Roasted Oil	Cold Pressed	Revitalising antioxidant support	Antioxidants, essential fatty acids	Lightweight	Body oils, massage blends, firming products	Supports skin tone & smoothness
Strawberry Seed Oil	Cold Pressed	Barrier support & hydration	Linoleic & oleic acids, vitamin E	Silky, non-greasy	Facial oils, sensitive skin care	Suitable for all skintypes
Cranberry Seed Exfoliant	Exfoliant	Gentle exfoliation	Supports absorption	Fine, smooth grain	Cleansers, masks, scrubs	Suitable for sensitive skin
Raspberry Seed Exfoliant	Exfoliant	Smooth, bright skin	Removes dead skin cells, antioxidant rich	Fine to medium grade	Face & body exfoliants, polishing treatments	Adds functional story beyond exfoliation
Strawberry Seed Exfoliant	Exfoliant	Gentle resurfacing & radiance	Natural abrasive texture, promotes cell turnover	Fine, soft grain	Scrubs, masks	Supports smooth radiant skin



## Oil Based Fragrance Systems

Ingredient	Category	Primary Benefit	Functional Attributes	Sensory Profile	Ideal Use Cases	Notes for Formulators
Clary Sage Oil	Essential Oil / Organic	Balancing herbal	Calming, clarifying	Slightly floral	Pulse-point oils, layering	Blend with florals/ citrus
Rose Geranium Essential Oil	Essential Oil / Organic	Uplifting floral	Fresh floral aroma	Sweet	Facial oils, balms	Skin-friendly
Neroli Oil	Essential Oil	Bright lift	Emotional resonance	Floral, citrusy	Facial oils, massage oils	Stable in oil blends
Sheanut Butter	Butter Refined / Butter Unrefined / Organic	Solid fragrance base	Soft balm texture	Creamy	Solid perfumes, body balms	Anchors fragrance
Vanilla CO <sup>2</sup>	Extract	Comfort lift	Calming aromatic cue	Smooth, warm	Perfume oils, balms	Pair with florals, spices