



O & 3

# Wellness

in Beauty & Personal Care

TRENDING NATURALLY  
2025

## In 2025...

...consumers are no longer just buying products; they are searching for something more – a connection, a promise, and a shared belief.

More than ever, people are prioritising brands that align with their values and emphasise sustainability, inclusivity, and innovation to make a positive impact on the world.

As a leading supplier of high-quality, natural ingredients for the cosmetics and personal care industry, O&3 are committed to providing sustainable and ethically sourced ingredients while staying at the forefront of innovation. Our dedication to environmental responsibility is reflected in our certifications and accreditations. These empower consumers to create beauty and personal care products formulated with natural ingredients that are just as kind to our skin as they are to the people and planet we source them from.

We are excited about 2025 and invite you to join us as we explore the key trends shaping the beauty and personal care landscape in the upcoming year, with a focus on sustainability, longevity, and wellness.



### Most Viewed Products on oand3.com in 2024

- 1 Vitamin E (Tocopherol 70%)
- 2 Castor Oil, Cold Pressed Organic
- 3 Batana (Ojon) Oil, Cold Pressed
- 4 Castor Oil (BP), Cold Pressed
- 5 Olive, Squalane

### Most Read Story Topics on oand3.com in 2024

- 1 Natural oils for feminine care
- 2 Essential oils for soapmaking
- 3 Formulating with Beeswax
- 4 Lymphatic drainage with natural oils
- 5 Lavender vs Lavandin

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# The Evolution of 2024 Trends in 2025

2024 proved to be a significant year for natural beauty and wellness, with the global market reaching an estimated \$1.8 trillion (McKinsey) and organic beauty and wellbeing experiencing a +6% growth in the organic health and personal care sector (Soil Association Certification). Let's recap the year's highlights and explore their evolution into 2025...

## Natural Collagen Alternatives

Plant-based collagen boosters like Jojoba Oil, Shea Butter, and Avocado Oil are rising in popularity as effective vegan options for beauty and wellness, offering the same benefits as collagen. Searches for sustainable, natural solutions are continuing to grow.

## Biohacking

Biohacking merges science, technology, and natural ingredients like Jojoba and Hemp Seed oils for personalised skincare and health solutions. This trend will evolve in 2025, leveraging plant-based innovations to optimise inner health and outer beauty.

## Nutricosmetics

Growing at an 8.05% CAGR, nutricosmetics blend nutrition and beauty, featuring ingredients like Ahiflower and Baobab in formats such as gummies and shots. Transparency, sustainability, and inside-out beauty solutions drive the market, set to reach \$11.91 billion by 2028.

## Probiotic Cosmetics

Probiotic skincare, valued at \$1.54 billion in 2017, is projected to grow at a 5.32% CAGR by 2027. Innovative products, including probiotic fragrances, cater to health-conscious, younger consumers seeking natural, organic options for skin microbiome health.



## Climate Change Top Concern of 2025

63% of experts and 45% of the general public rank it among their top risks for the third consecutive year.\*

And despite heightened awareness, the shift to sustainable behaviours can still be held back by factors such as cost and convenience.

\*Axa Future Risks Report 2024

## Batana Oil

Batana Oil, known for its hair growth and shine benefits, is rising as a natural star in the hair oil market, predicted to reach \$6.04 billion by 2030. Rich in vitamins and fatty acids, it is being increasingly featured in shampoo, conditioner, and mask formulations.

## Whole Body Deodorant

Natural deodorants with simple, plant-based ingredients like Shea Butter and Coconut Oil gained traction in 2024. Brands continue to emphasise transparency, eco-friendly packaging, and cruelty-free initiatives, meeting consumer demand for safer, sustainable options.

## Year-Round SPF

Year-round SPF use surged in 2024 due to Korean beauty influence and awareness of UVA damage. Lightweight, reef-safe, inclusive formulations are in demand as consumers seek versatile, anti-ageing, and sustainable sun protection in 2025.

## Ayurvedic Beauty

Ayurvedic beauty blends ancient wisdom with modern science, offering personalised, sustainable wellness solutions. Brands like Kama Ayurveda combine authenticity, ethical sourcing, and elegant design, driving the trend's appeal through 2025 as consumers seek natural, mind-body balance.

# Exosomes

The growing interest in exosome technology, combined with the increasing demand for natural, sustainable, and science-driven beauty products, positions exosomes as a key ingredient to watch in the coming years.

Exosomes are tiny extracellular vesicles, naturally released by cells and play a critical role in facilitating communication between skin cells. By helping to regenerate tissue, reduce inflammation, and promote healing, exosomes are gaining attention in both skincare and wellness, as well as key players in regenerative medicine.

In the beauty industry, exosomes are revolutionising how skincare is approached, especially when it comes to anti-ageing and skin rejuvenation. As unlike traditional active ingredients, exosomes deliver targeted benefits by encouraging the skin's natural repair mechanisms. This cellular-level support can boost collagen production, enhance skin elasticity, and reduce the appearance of fine lines and wrinkles, offering results that are not only natural but long-lasting.

Human exosomes work best with human skin but due to the restrictions on human exosomes in most countries, the focus has shifted to plant stem cell-derived exosomes, as well as exosomes derived from various animal sources such as avian, bovine, porcine, and fish stem cells. These alternatives are seen as viable options to replicate some of the benefits of human exosomes in cosmetic formulations.

However, each exosome type has distinct properties and targets, meaning that its effectiveness is determined by its ability to address specific skin concerns or conditions.

Bacterial exosomes are also gaining attention in both medical and cosmetic fields due to their potential as drug delivery systems and their potential to target specific diseases. Although bacterial exosomes are still in early stages of research, they could eventually offer new pathways for enhancing skincare formulations.

For brands that formulate beauty and personal care products, incorporating exosomes in formulations is an opportunity to create high performance, scientifically backed products.

Whether exploring the benefits of plant-derived exosomes or the more established use of animal-based exosomes, beauty brands have a unique opportunity to leverage the potential of these groundbreaking ingredients in their formulations. However, the success of exosome-infused skincare will ultimately depend on continued research, regulatory developments, and the ability to prove efficacy through well-designed clinical studies.



## Global Exosome Market to Reach \$794.2 Million 2030

The global exosomes industry is projected to experience a compound annual growth rate (CAGR) of 28.7% between 2025 and 2030 from \$177.3 million in 2024.

\*Horizon Grand View Research Global Exosomes Market Size & Outlook, 2024-2030

# Microbiomes and Gut Health

Following on from the nutricosmetics and probiotic cosmetic trends we saw in 2024, this year, gut health continues to redefine wellness, linking internal balance to external radiance.

The microbiome, a complex ecosystem of microorganisms in the gut, plays a key role in digestion, immunity, and the gut-skin connection, which links internal health to glowing skin.

Probiotics and prebiotics are at the heart of this movement, as they play a vital role in maintaining a balanced gut microbiome.

Natural oils such as Flaxseed, Coconut, and Evening Primrose Oil are known for their ability to enhance gut health and support skin from within. Flaxseed Oil, rich in omega-3 fatty acids, reduces inflammation in the gut while promoting a smoother, more hydrated complexion. Coconut Oil, with its medium-chain triglycerides (MCTs), supports digestion and helps maintain microbial balance. And Evening Primrose Oil, high in gamma-linolenic acid (GLA), helps to sooth inflammatory skin conditions while balancing the gut.

The rise of gut-health-focused products ties directly to the longevity movement, as consumers increasingly recognise the importance of maintaining a healthy microbiome to support ageing gracefully.

By blending probiotics, prebiotics, and natural ingredients, brands can create innovative solutions that support natural wellness, tapping into the growing consumer demand for natural, effective, and sustainable products.



## Featured Nutricosmetic Ingredients

Personalisation and customisation are important, offering tailored solutions based on individual needs and formulations, but here are some of our favourite oils to incorporate into nutricosmetic products...

**Blackcurrant Seed Oil** is rich in gamma-linolenic acid (GLA), which nourishes hair follicles and promotes hair growth.

**Baobab Oil** is a deeply moisturising oil with anti-inflammatory properties, beneficial for all skin types.

**Sea Buckthorn Oil** is rich in omega 3, 6, 7, and 9 fatty acids, vitamins A, C, and E, and carotenoids. It also helps to promote skin elasticity, reduces wrinkles, and improve hydration.

**Ahiflower Oil** is a sustainable alternative to fish oil, rich in omega-3 and omega-6 fatty acids for overall skin and hair health.

**Kalahari Melon Seed Oil** is full of antioxidants and essential fatty acids, and is known for its anti-ageing benefits.

## What are Prebiotics?

Plant-based fibres that nourish these beneficial bacteria, amplifying their positive effects on the body and skin. And natural oils are becoming powerful complementary ingredients for brands developing nutricosmetics, nutraceuticals, and functional foods.

## What are Probiotics?

Live beneficial bacteria that help balance the gut microbiome, promoting better digestion and nutrient absorption while reducing inflammation.



# Sensescaping

The practice of intentionally creating an environment that nurtures the senses.

This can be through scents, textures, and sounds that we encounter in our day-to-day lives.

For example, essential oils such as Blue Tansy or Ho Wood, known for their calming properties, can help to relieve stress and encourage better sleep, showing that scent can have a powerful impact on mood and well-being.

The textures of butters and oils, such as the velvety richness of Shea Butter or the silky glide of Argan Oil, add a tangible element that transform skincare routines into moments of self-care.

Incorporating soft, soothing materials during these rituals, such as smooth fabrics or gentle application techniques, can add to the textural experience.

Just as scent and touch aid in relaxation, listening to white noise, rain sounds, or gentle music can complete the sensory experience.

However, it isn't all about relaxation; it's the concept of comfort and nostalgia that can be incorporated into daily wellness routines.

So, for a more uplifting experience, scents of High-altitude Lavender, the cool touch of Aloe Vera Gel, along with nostalgic upbeat music, could be a way to invigorate a wellness routine.

This mindful approach to surroundings can elevate daily rituals, whether in the home, office, or during self-care practices, to create a natural sense of wellness and calm.

## The Importance of Sustainable Wellness Routines and Rituals in a Hectic World

Wellness has taken on a new form that focusses on slowing down, simplifying, and bringing intentionality into our everyday lives.

Whilst the demands of work, social commitments, and the constant flow of information can sometimes feel overwhelming, these challenges also create an opportunity for growth and innovation, especially for brands.

Routines and rituals are becoming the foundation of the wellness movement, offering structure and a sense of calmness in today's fast-paced world.

Underpinned by a desire for natural, sustainable living, routines can help us reconnect with our emotions, mindfulness, purpose, and balance, whilst embracing choices that are kinder to people and the planet - an approach that ensures sustainability becomes an effortless part of our lives, seamlessly incorporated into routines.





## Hair Care Trends

The evolution in hair care for 2025 builds upon the growing 'skinification' of hair care seen in 2024, taking the focus beyond the hair itself to the scalp as the foundation of healthy hair.

This approach, also known as 'scalp biotics', emphasises the importance of a balanced scalp microbiome, the complex ecosystem of microorganisms living on the scalp. Just as gut health is linked to overall well-being, a healthy scalp microbiome is crucial for optimal hair growth, strength, and overall scalp health, presenting a significant opportunity for brands to use natural ingredients and create formulations to cater to this growing demand.

The textures of scalp treatments are also evolving, offering brands a chance to incorporate the benefits of natural oils, scrubs, and butters into formulations.

For example, a scalp scrub formulated with finely ground apricot kernels for gentle exfoliation, combined with the nourishing properties of shea butter and coconut oil to soothe the scalp.

Or for a lightweight scalp serum formulation, made with the invigorating scent and properties of rosemary oil. These natural ingredients not only deliver tangible benefits but also create a luxurious and sensorial experience for consumers, mirroring the natural approach to wellness seen in the sensescaping trend.

This trend allows brands to tap into the consumer desire for natural, effective, and sustainable hair care solutions that promote both immediate and long-term scalp and hair health.

Brands can capitalise on the link with the longevity movement by highlighting the long-term benefits of using natural ingredients to support scalp health. For example, promoting the use of argan oil, rich in antioxidants and fatty acids, to protect the scalp from environmental stressors and promote healthy hair growth for overall wellness and vitality.

# Bio-Perfumery

Building on the 2024 trends of personalised wellness and biohacking, 'Bio-perfumery' may be the next big thing in the fragrance sector.

This movement will go beyond traditional fragrance creation by prioritising personalised experiences and sustainable practices, a must in 2025.

It is predicted that this will be a trend that uses a mixture of biotechnology and AI to create unique fragrance profiles tailored to individual consumers, and wearable technology may analyse factors like stress levels and heart rate to recommend personalised blends. AI algorithms could analyse individual preferences, lifestyle data, and even genetic information to generate unique fragrance compositions bringing us into a very futuristic aspect of personal care.

**As demand for natural ingredients continues to rise, natural essential oils, absolutes, and extracts could be incorporated into formulations.**

Reflecting the increasing consumer preference for natural and eco-friendly ingredients, a report by Straits Research predicts that the global natural extracts market size will reach \$21.95 billion by 2031.

Bio-perfumery formulations may include exploring rare and unique ingredients such as Rose Absolute, known for its luxurious and complex aroma, or Sandalwood Oil, for its warm and woody notes.

The focus is on uncovering the potential of lesser-known plants, leading to innovative and unexpected fragrance profiles.

**The concept of 'living fragrances' is also a trend making its way into the industry in 2025...**

These fragrances could incorporate ingredients that react to environmental factors such as temperature and humidity, creating dynamic scent experiences.

Formulations may even interact with the wearer's unique skin chemistry, resulting in a personalised scent that evolves throughout the day.

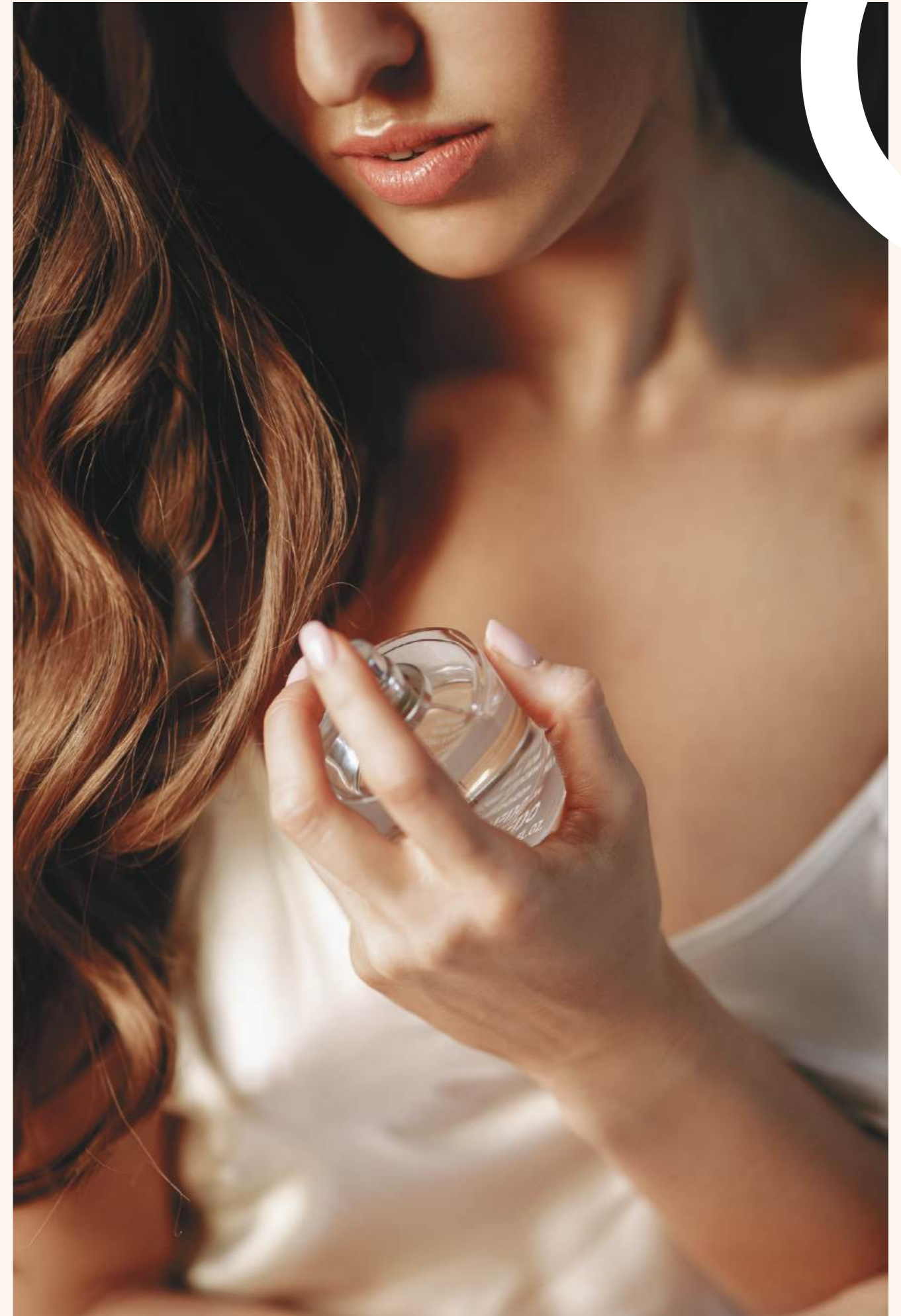
Fragrances may feature Ylang Ylang Essential Oil known to have a calming and uplifting effect, or Jasmine Absolute, which can enhance mood and promote relaxation.

Whether bio-perfumery or biohacking, natural ingredients will be carefully selected to create fragrances that evolve throughout the day, adapting to the wearer's lifestyle and needs.

## Global Natural Extracts Market to Reach \$21.95 Billion 2031

The global natural extracts market size is predicted to reach \$21.95 billion by 2031, growing at a CAGR of 7.8% from \$11.17 billion in 2022.

\*Straits Research





# Natural Ingredients for Hormone Health

## Everyday life exposes us to a huge array of toxins.

From air pollution, plastics, and pesticides to synthetic chemicals in household, cosmetic, and personal care products, these toxins often include endocrine disruptors (compounds that can interfere with the hormonal system).

## 'There were approximately 350,000 synthetic chemicals in use in 2022, a number that has only been growing since...'

And according to Science Alert, there were approximately 350,000 synthetic chemicals in use in 2022, a number that has only been growing since, as new chemicals are developed and introduced into the market. However, many have not been thoroughly tested for long-term safety.

For brands, understanding this connection isn't just good practice, but is essential for meeting the demand for safer, more sustainable products.

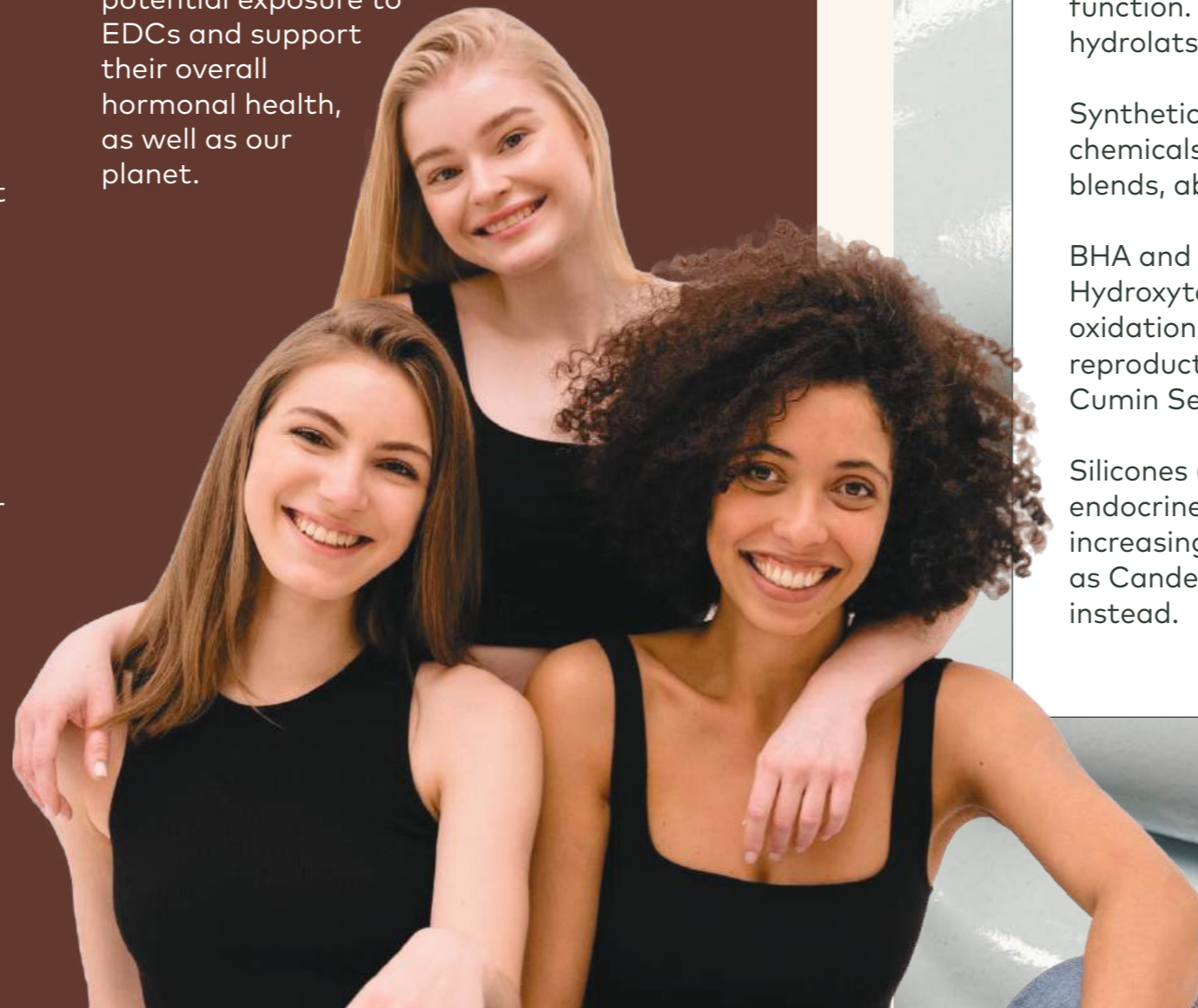
## Hormonal imbalances don't just affect internal health, they also manifest externally.

Skin health, energy levels, and even confidence can suffer when the endocrine system is disrupted.

This creates an opportunity, and arguably, a responsibility for brands to stand out by offering products that align with the growing consumer preference for toxin-free options.

Challenges such as raising awareness of endocrine disruptors (EDCs) and the rise in hormone-related health conditions emphasise the need for brands to provide innovative, clean, and trustworthy formulations.

So, by being mindful of the ingredients in skincare and personal care products, together we can reduce consumers' potential exposure to EDCs and support their overall hormonal health, as well as our planet.



## Synthetic ingredients to avoid and the best natural alternatives for hormone balance

By replacing synthetic ingredients with natural alternatives, brands can create safer, effective formulations that protect and promote hormonal balance while meeting consumer demand for cleaner, toxin-free products. Here are some of the most common endocrine disruptors and potential natural alternative options:

Parabens are commonly used as preservatives but mimic oestrogen, potentially disrupting hormonal balance. Try Vitamin E (tocopherol), Neem Oil, or Tea Tree Oil instead.

Phthalates are used to stabilise synthetic fragrances, but can interfere with testosterone production and overall hormone function. Try essential oils, Vanilla CO2 Extract, or hydrosols and hydrolats instead.

Synthetic fragrances often contain a mix of unidentified chemicals, some linked to endocrine disruption. Try essential oil blends, absolutes, or natural distillates instead.

BHA and BHT (Butylated Hydroxyanisole and Butylated Hydroxytoluene) are synthetic antioxidants used to prevent oxidation in products, which mimic oestrogen and may disrupt reproductive health. Try Sea Buckthorn Oil, Avocado Oil, or Black Cumin Seed Oil instead.

Silicones (e.g. Dimethicone, Cyclopentasiloxane), while not directly endocrine disruptors, silicones can occlude skin and trap toxins, increasing potential exposure. Try Aloe Vera Gel, plant waxes such as Candelilla and Carnauba, or Mango Butter and Kokum Butter instead.



# Natural Ingredient Spotlight

## Vitamin E (Tocopherol 70%)

Derived from Sunflower, Vitamin E (Tocopherol 70%) serves as an antioxidant, helping to shield the skin and hair cells from the harmful effects of free radicals.

- Great for skin and hair care
- Enhances shelf-life of products due to its excellent preservative properties



## Jasmine Butter

A rich and creamy butter, deeply moisturising and nourishing, making it ideal for all skin types.

- Softens and smooths the skin
- Helps reduce the appearance of fine lines and wrinkles
- Leaves the skin looking plump and youthful
- Delightful fragrance to promote relaxation and well-being
- Versatile - can be applied directly to the skin, used as a mask, or added to formulations
- Easily-absorbed



## NEW Crystal Natural White Soap Base

99.9% natural base, high foaming, and luxurious skin feel.

- No titanium dropout - uses lauric acid instead
- Detergent and sulphate-free
- Dermatologically tested
- Can create different, strong shades of colour



## NEW Crystal Natural Transparent Soap Base

99.9% natural base, high foaming, and luxurious skin feel.

- 100% natural detergent
- Sulphate-free
- Contains a natural solubiliser (Durosoft PG10CY)
- Exceptional clarity, enhancing each colour with a vivid, glass-like replacement



## Olive Squalane

A lightweight, non-comedogenic oil that is easily absorbed by the skin.

- 100% plant-based emollient
- Helps prevent moisture loss in the skin
- Aids restoration of skin's suppleness and glow
- Extremely stable and resists oxidation
- Very little odour
- Soluble in other natural oils



## Batana (Ojon) Cold-Pressed Oil

A rare and exotic oil with a rich history of use in traditional medicine.

- A treasure trove of vitamins, minerals, and antioxidants
- Deeply nourishes skin and hair
- Protects the skin from environmental damage and potential to promote collagen production
- Restores, strengthens, and hydrates the hair, with potential to aid hair growth



“As we step into 2025, the demand for authenticity, sustainability, and natural innovation has never been stronger.

At O&3, our passion lies in providing high-quality, responsibly sourced natural ingredients that empower brands to meet these expectations and create meaningful connections with their customers.

Together, let's embrace the beauty of nature to shape a more sustainable and impactful future for our industry.”

**Thomas Kerfoot**  
O&3 Co-founder & Commercial Director



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