



SPATE

DECEMBER 2024

# 2025 BEAUTY TRENDS REPORT



# TOP PREDICTED BEAUTY TRENDS OF 2025

Spate's predicted trends for 2025 indicate a growing emphasis on category convergence, with body care increasingly borrowing from skincare to create innovative, multi-benefit solutions. From glycolic body lotions to turmeric soaps, this crossover reflects consumers' desire for products that address comprehensive skincare needs from head to toe. Brands that embrace this shift can tap into expanding markets and redefine how body care is perceived.

Textures and routines are also reshaping consumer preferences, from jelly-like skincare products to the rise of fragrance layering routines and low-maintenance makeup routines. These trends highlight the demand for unique, sensorial experiences and long-lasting results. By staying ahead of these evolving priorities, brands can create offerings that resonate with modern beauty consumers.

Explore this report to uncover the top trends anticipated to make waves in 2025 across skincare, hair care, makeup, body care, and fragrance categories.

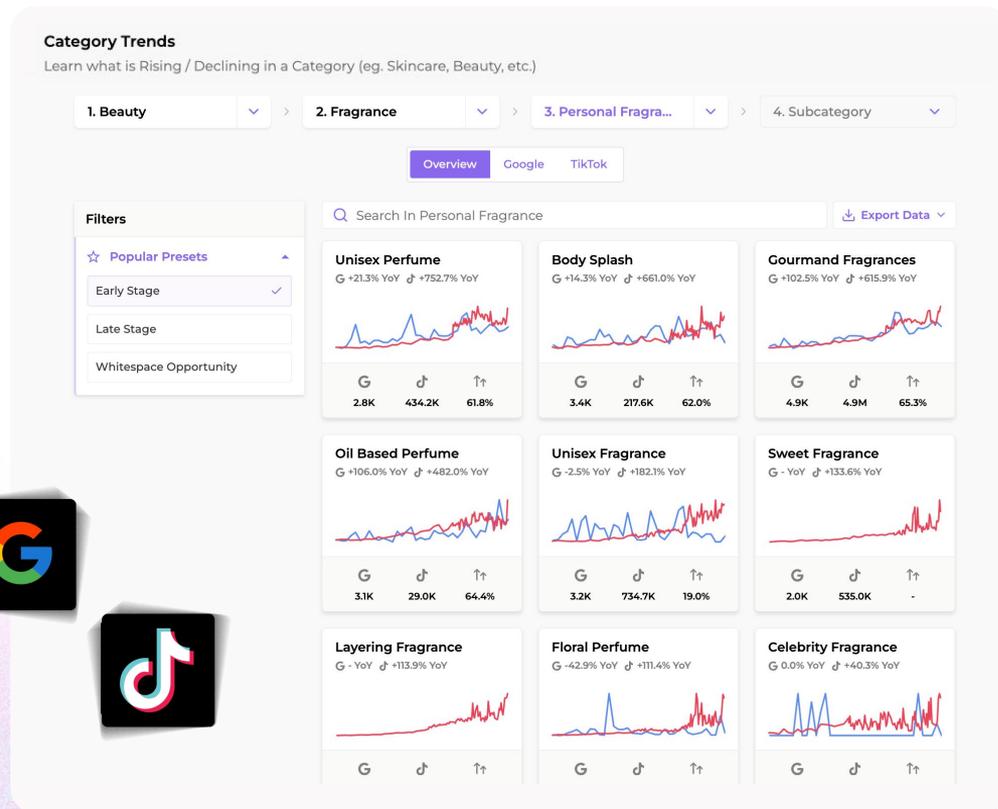
Interested in exploring more trends? [Start your free trial today.](#)

Thank you,  
Olivier and Yarden, co-founders of Spate

# DISCOVERED BY SPATE

The trends in this report were uncovered using Spate's dashboard. Discover how you can access exclusive insights, predictions, and trends to keep your brand ahead of evolving consumer preferences.

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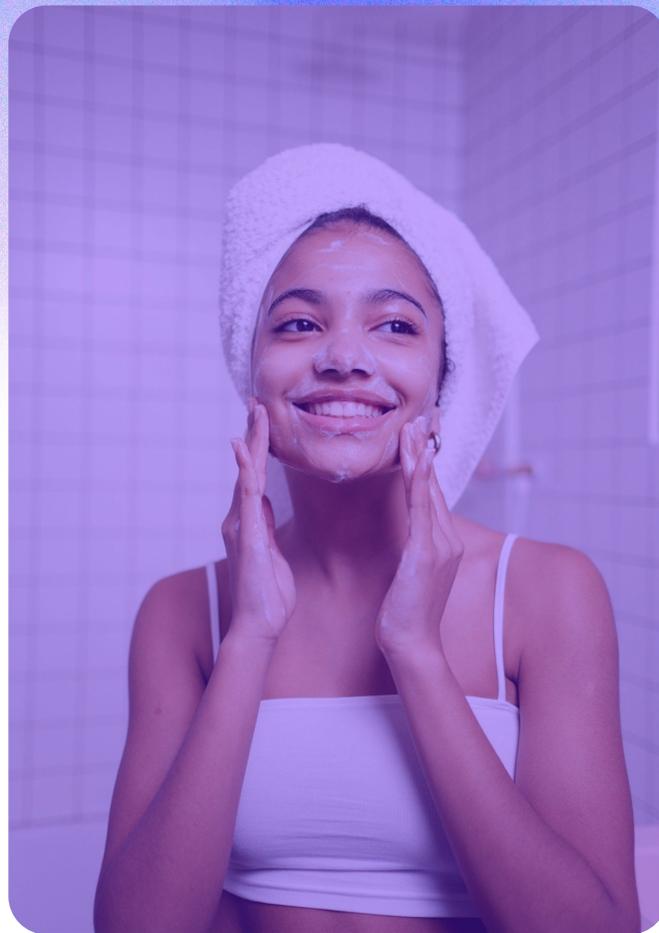
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# [ THE TRENDS ]

# 2025 PREDICTED TRENDS

Trends per category ranked by predicted growth:

## SKINCARE

Trend	Predicted Growth ↓
milky toner	+58.9%
snail serum	+54.2%
red light wand	+51.2%
korean sunscreen	+49.2%
collagen patch	+44.2%
glycolic acid toner	+42.9%
biorepeel	+42.8%
hypochlorous acid spray	+42.1%
red light face mask	+38.4%
centella ampoule	+38.2%

## HAIR

Trend	Predicted Growth ↓
boho knotless braids	+50.8%
texturizing powder	+50.7%
scalp spa	+47.2%
cherry cola hair	+47.0%
high burst fade	+44.0%
mermaid braids	+39.4%
heatless hair curlers	+36.9%
thermal brush	+34.9%
hair loss topical solution	+33.8%
micro bangs	+33.0%

## MAKEUP

Trend	Predicted Growth ↓
aegyosal	+134.7%
cluster lashes	+57.3%
brow stain	+44.8%
tubing mascara	+42.3%
peel off lip stain	+38.2%
brown mascara	+36.3%
dark lip liner	+33.6%
clean girl makeup	+25.5%
brown lip liner	+23.8%
mature skin makeup	+17.3%

# 2025 PREDICTED TRENDS

Trends per category ranked by predicted growth:

BODY	
Trend	Predicted Growth ↓
african net sponge	+120.6%
magnesium oil	+84.7%
glycolic body lotion	+44.1%
everything shower	+44.0%
turmeric soap	+35.4%
vanilla body wash	+35.2%
vanilla lotion	+31.9%
vitamin c body lotion	+26.8%
unscented soap	+25.8%
vanilla deodorant	+20.0%

FRAGRANCE	
Trend	Predicted Growth ↓
watermelon perfume	+61.7%
caramel perfume	+42.1%
matcha perfume	+41.3%
gourmand fragrances	+33.9%
marshmallow perfume	+33.9%
travel perfume	+33.0%
vanilla perfume	+32.3%
perfume discovery set	+31.9%
oil based perfume	+27.8%
musk perfume	+19.0%

# CATEGORY DEEP DIVES

# 2025 TRENDS: SKINCARE



SKINCARE



HAIR



MAKEUP



BATH & BODY



FRAGRANCE

# 2025 PREDICTED TRENDS: SAFE BETS

Trends per category ranked by predicted growth:

## SKINCARE

Trend	Predicted Growth ↓
<b>milky toner</b>	<b>+58.9%</b>
<b>snail serum</b>	<b>+54.2%</b>
<b>red light wand</b>	<b>+51.2%</b>
<b>korean sunscreen</b>	<b>+49.2%</b>
<b>collagen patch</b>	<b>+44.2%</b>
<b>glycolic acid toner</b>	<b>+42.9%</b>
<b>biorepeel</b>	<b>+42.8%</b>
<b>hypochlorous acid spray</b>	<b>+42.1%</b>
<b>red light face mask</b>	<b>+38.4%</b>
<b>centella ampoule</b>	<b>+38.2%</b>

## HAIR

Trend	Predicted Growth ↓
boho knotless braids	+50.8%
texturizing powder	+50.7%
scalp spa	+47.2%
cherry cola hair	+47.0%
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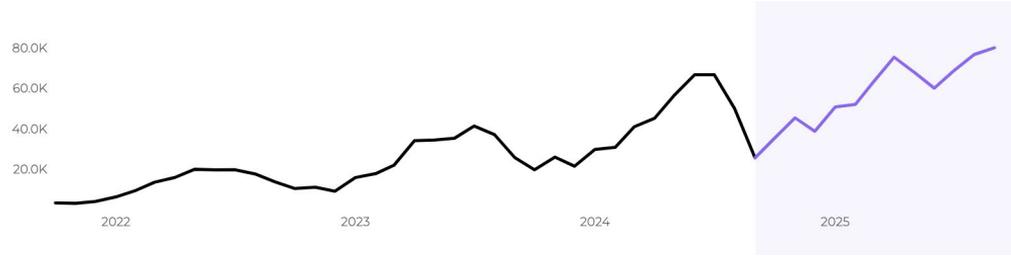
## MAKEUP

Trend	Predicted Growth ↓
aegyosal	+134.7%
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brow stain	+44.8%
tubing mascara	+42.3%
peel off lip stain	+38.2%
brown mascara	+36.3%
dark lip liner	+33.6%
clean girl makeup	+25.5%
brown lip liner	+23.8%
mature skin makeup	+17.3%



TREND SPOTLIGHT

# KOREAN SUNSCREEN



### HOW BIG IS THIS TREND

Very High Volume  
44.3K average monthly searches

### HOW COMPETITIVE IS THE SPACE?

Very Low Competition  
90.0 average brand searches

### HOW SIMILAR IS THIS TREND ACROSS PLATFORMS?

High Convergence  
79.2% Convergence

### WILL IT LAST?

Very Likely

### STATS:

**+49.2%**

PREDICTED 2025  
YEAR-OVER-YEAR  
GROWTH

### RELATED SEARCHES:

Concerns	Volume↕	Formats	Volume↕	Benefits	Volume↕
oily skin	1.2K	stick	2.0K	spf	4.0K
acne prone [skin]	170.0	moisturizer	180.0	tinted	440.0
sensitive skin	90.0	mist	120.0	setting	90.0
		spray	90.0		

### SPATE POV

Although seasonal, the growth in searches for Korean sunscreen and its very high volume indicates this trend's high potential. It is important to note that this trend refers to the concept of the Korean sunscreen—and associated characteristics—rather than specific Korean brands consumers are searching for. Top searched concerns alongside Korean sunscreen such as *oily skin*, *acne prone [skin]* and *sensitive skin* reveal consumers are looking for products that will please their skin type. The variety of searched formats, from *stick* to *moisturizer*, *mist* and *spray*, illustrate once again consumers' search for the perfect sunscreen.

# TOP TRENDING SKINCARE CLAIMS

The top trending skincare claims in search highlight the current skincare consumer's emphasis on skin health and product's safety. Benefits such as *fragrance free*, *skin [barrier] repair*, *acne safe*, and *hypoallergenic* all support the modern consumer's desire for skincare that is safe, and supports skin health. Searches for *plump* and *glowy* showcase some of the popular marketing claims top of mind for the skincare consumer, reflecting consumer's desire for a plumped and glowy skin. The increase in searches for *pore control* alongside Skincare emphasizes the consumer's interest in products that help to achieve a smooth and even skin.

## SKINCARE CLAIMS BY INCREASE

Trend	Increase↕
pore control	<b>+5.2K</b>
spf 15	<b>+4.3K</b>
fragrance free	<b>+3.7K</b>
plump	<b>+3.1K</b>
skin [barrier] repair	<b>+2.6K</b>
glowy	<b>+2.6K</b>
acne safe	<b>+1.5K</b>
hypoallergenic	<b>+965.0</b>

Source: Google Search data, average monthly search volume increase comparing the past 12 months ending September 2024 vs the 12 months prior (US); Rising Clusters

# TOP TRENDING SKINCARE CONCERNS

The skincare concerns ranked by increase in searches highlight the concerns making an impact in the skincare conversation today. The surge in searches for concerns like *bumps*, *pimple*, *stye* and *fungus acne* suggests a heightened consumer focus on addressing specific skin conditions and sensitivities. The interest in treating *dry acne prone [skin]* and *dry lips* while ensuring *skin barrier repair* indicates a growing demand for products that are gentle with the skin and provide hydration and repair. Searches for *sebum*, *pimple*, and *bumps* reflect consumers seeking solutions for products that are safe for *acne-prone* skin, or can control sebum to decrease risks of a breakout. The attention to *mature skin* highlights a growing importance of specific aging-related skin concerns.

## SKINCARE CONCERNS BY INCREASE

Trend	Increase↓
pimple	<b>+16.2K</b>
mature skin	<b>+2.9K</b>
dry acne prone	<b>+2.3K</b>
fungus acne	<b>+2.0K</b>
sebum	<b>+1.8K</b>
skin barrier repair	<b>+1.5K</b>
dry lips	<b>+1.4K</b>
bumps	<b>+736.0</b>

**Source:** Google Search data, average monthly search volume increase comparing the past 12 months ending September 2024 vs the 12 months prior (US); Rising Clusters

# 2025 TRENDS: HAIR



SKINCARE



HAIR



MAKEUP



BATH & BODY



FRAGRANCE

# 2025 PREDICTED TRENDS: SAFE BETS

Trends per category ranked by predicted growth:

## SKINCARE

Trend	Predicted Growth ↓
milky toner	+58.9%
snail serum	+54.2%
red light wand	+51.2%
korean sunscreen	+49.2%
collagen patch	+44.2%
glycolic acid toner	+42.9%
biorepeel	+42.8%
hypochlorous acid spray	+42.1%
red light face mask	+38.4%
centella ampoule	+38.2%

## HAIR

Trend	Predicted Growth ↓
<b>boho knotless braids</b>	<b>+50.8%</b>
<b>texturizing powder</b>	<b>+50.7%</b>
<b>scalp spa</b>	<b>+47.2%</b>
<b>cherry cola hair</b>	<b>+47.0%</b>
<b>high burst fade</b>	<b>+44.0%</b>
<b>mermaid braids</b>	<b>+39.4%</b>
<b>heatless hair curlers</b>	<b>+36.9%</b>
<b>thermal brush</b>	<b>+34.9%</b>
<b>hair loss topical solution</b>	<b>+33.8%</b>
<b>micro bangs</b>	<b>+33.0%</b>

## MAKEUP

Trend	Predicted Growth ↓
aegyosal	+134.7%
cluster lashes	+57.3%
brow stain	+44.8%
tubing mascara	+42.3%
peel off lip stain	+38.2%
brown mascara	+36.3%
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clean girl makeup	+25.5%
brown lip liner	+23.8%
mature skin makeup	+17.3%

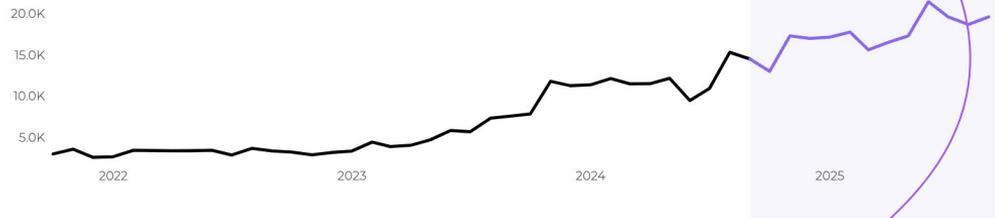


TREND SPOTLIGHT

# TEXTURIZING POWDER



The top viewed texturizing powder brand on TikTok is #basedbodyworks. Want more TikTok hair data? [Book a meeting today.](#)



### HOW BIG IS THIS TREND

High Volume  
14.9K average monthly searches

### HOW COMPETITIVE IS THE SPACE?

High Competition  
4.4K average brand searches

### HOW SIMILAR IS THIS TREND ACROSS PLATFORMS?

Very High Convergence  
85.2% Convergence

### WILL IT LAST?

Very Likely

### STATS:

# +50.7%

PREDICTED 2025  
YEAR-OVER-YEAR  
GROWTH

### RELATED SEARCHES:

Questions	Volume↕	Brands	Volume↕	Benefits	Volume↕
best	330.0	slick gorilla	2.1K	instant	150.0
is [texturizing powder] bad	160.0	redken	920.0	texturizing	130.0
how to use	110.0	based body works	390.0	mattifying	120.0
		davines	260.0		

### SPATE POV

The growth in searches for texturizing powder in the last two years, as well as the predicted growth of +50.7% in the upcoming year indicates this hair care trend is one top of mind for consumers. Top searched questions alongside texturizing powder such as *is [texturizing powder] bad* and *how to use* reveal consumers are still discovering the benefits and uses of this hair styling product. Trending brands include *Slick gorilla*, *Redken*, *Based body works*, and *Davines*. Consumers are using texturizing powder to achieve various finishes, such as mattifying, making it essential for brands to stay attuned to evolving preferences.

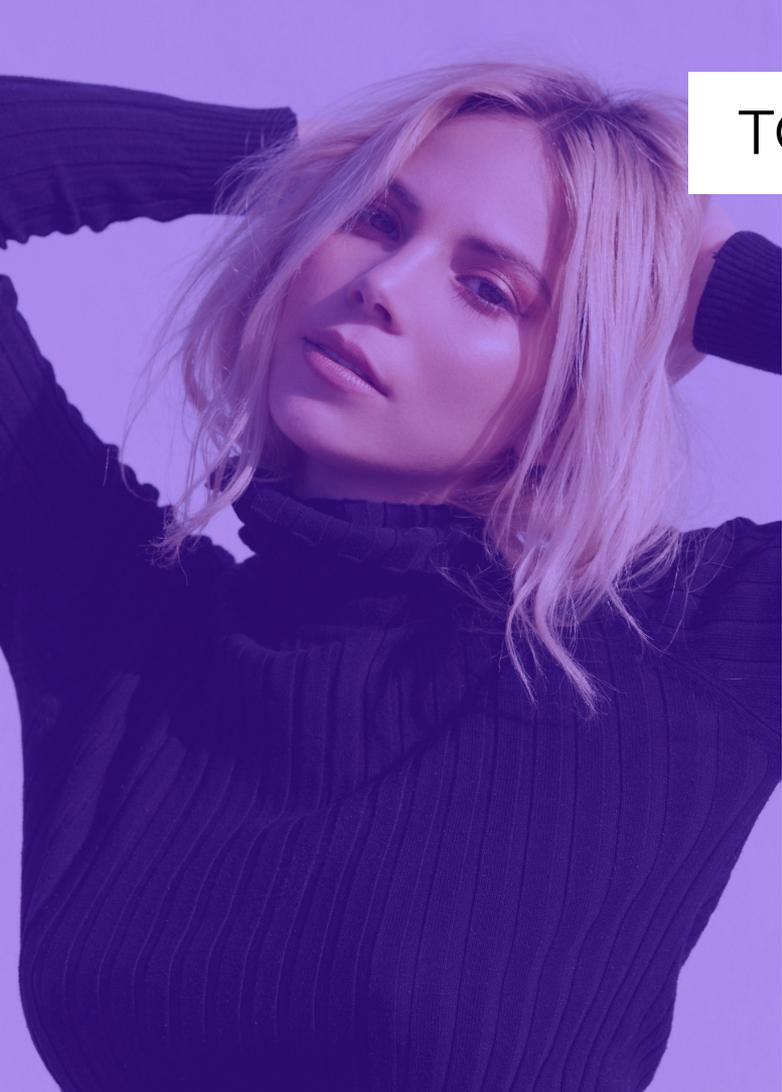
# TOP TRENDING HAIR CLAIMS

Top trending hair claims highlight the hairstyles consumers are looking to achieve when it comes to their hair in 2024, and the benefits they search alongside products. The increasing interest in *textured*, *versatile*, and *tousled* hairstyles indicates a consumer preference for effortless and voluminous looks. The popularity of *textured*, *balancing*, *purifying*, and *frizz control* also suggests a demand for specialized products that please with various hair types and help with general hair health. The focus on *no ammonia* [hair dye], and *sls free* [shampoo] reflects a need for products that are safe and won't damage the hair.

## HAIR CLAIMS BY INCREASE

Trend	Increase↓
textured	<b>+10.1K</b>
versatile [hairstyles]	<b>+2.8K</b>
tousled [hair]	<b>+1.5K</b>
purifying	<b>+1.2K</b>
no ammonia [hair dye / color]	<b>+964.0</b>
frizz control	<b>+960.0</b>
balancing	<b>+614.0</b>
sls free [shampoo]	<b>+434.0</b>

**Source:** Google Search data, average monthly search volume increase comparing the past 12 months ending September 2024 vs the 12 months prior (US); Rising Clusters



# TOP TRENDING HAIR CONCERNS

The surge in searches for *baldness* and *hormonal hair loss* indicates a strong consumer focus on addressing concerns related to hair density and hair loss, including when caused by hormonal changes. The interest in *fungal [acne], psoriasis treatment, sensitive scalp, dermatitis, and tinea versicolor* suggests a growing concern for scalp health, with consumers seeking solutions for discomfort and specific skin conditions. The focus on *waxy hair, coily hair, and medium porosity hair* underscores consumers' growing knowledge when it comes to types and concerns that affect the hair shaft, and the demand for targeted solutions, indicating a desire for products addressing specific issues.

## HAIR CONCERNS BY INCREASE

Trend	Increase↓
psoriasis treatment	<b>+3.4K</b>
baldness	<b>+2.9K</b>
sensitive scalp	<b>+2.0K</b>
dermatitis	<b>+2.0K</b>
hormonal hair loss	<b>+1.7K</b>
waxy hair	<b>+1.1K</b>
coily hair	<b>+1.1K</b>
medium porosity hair	<b>+1.0K</b>

**Source:** Google Search data, average monthly search volume increase comparing the past 12 months ending September 2024 vs the 12 months prior (US); Rising Clusters

# 2025 TRENDS: MAKEUP



SKINCARE



HAIR



MAKEUP



BATH & BODY



FRAGRANCE

# 2025 PREDICTED TRENDS: SAFE BETS

Trends per category ranked by predicted growth:

## SKINCARE

Trend	Predicted Growth ↓
milky toner	+58.9%
snail serum	+54.2%
red light wand	+51.2%
korean sunscreen	+49.2%
collagen patch	+44.2%
glycolic acid toner	+42.9%
biorepeel	+42.8%
hypochlorous acid spray	+42.1%
red light face mask	+38.4%
centella ampoule	+38.2%

## HAIR

Trend	Predicted Growth ↓
boho knotless braids	+50.8%
texturizing powder	+50.7%
scalp spa	+47.2%
cherry cola hair	+47.0%
high burst fade	+44.0%
mermaid braids	+39.4%
heatless hair curlers	+36.9%
thermal brush	+34.9%
hair loss topical solution	+33.8%
micro bangs	+33.0%

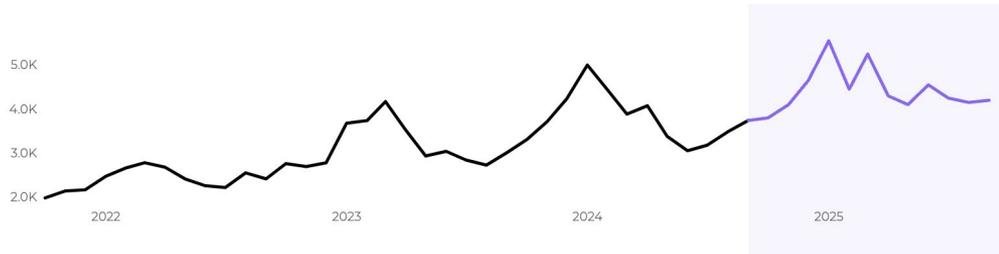
## MAKEUP

Trend	Predicted Growth ↓
<b>aegyosal</b>	<b>+134.7%</b>
<b>cluster lashes</b>	<b>+57.3%</b>
<b>brow stain</b>	<b>+44.8%</b>
<b>tubing mascara</b>	<b>+42.3%</b>
<b>peel off lip stain</b>	<b>+38.2%</b>
<b>brown mascara</b>	<b>+36.3%</b>
<b>dark lip liner</b>	<b>+33.6%</b>
<b>clean girl makeup</b>	<b>+25.5%</b>
<b>brown lip liner</b>	<b>+23.8%</b>
<b>mature skin makeup</b>	<b>+17.3%</b>



TREND SPOTLIGHT

# MATURE SKIN MAKEUP



### HOW BIG IS THIS TREND

Medium Volume  
7.1K average monthly searches

### HOW COMPETITIVE IS THE SPACE?

Low Competition  
180.0 average brand searches

### HOW SIMILAR IS THIS TREND ACROSS PLATFORMS?

Low Convergence  
34.9% Convergence

### WILL IT LAST?

Very Likely

### STATS:

# +17.3%

PREDICTED 2025  
YEAR-OVER-YEAR  
GROWTH

### RELATED SEARCHES:

Questions	Volume↕
best	4.0K
good for [mature skin]	200.0

Brands	Volume↕
laura geller	110.0
l'oreal paris	70.0

Top Search Queries	Volume↕
best makeup for mature skin	1.9K
makeup for mature skin	1.3K
mature skin makeup	590.0

### SPATE POV

Despite a medium volume, the mature skin makeup shows positive past and future growth, presenting an opportunity for brands to answer unmet needs, with only two related brands, *Laura Geller*, and *L'Oreal Paris*. Top searched questions alongside mature skin makeup such as *best* and *good for [mature skin]* reveal consumers are still looking for products that will please more mature skin. Brands should tap into this growing trend and offer products adapted to more mature skins, with an emphasis on how important textures, formulas, and application techniques are.



# TOP TRENDING MAKEUP CLAIMS AND CONCERNS

The increasing searches for *non-comedogenic* and *pimple* alongside makeup reflect a growing awareness of the importance of acne-safe formulas in the makeup category. *Highlighting* and *glowy* makeup benefits support the consumer's continued desire for radiant finishes, aligning with the desire for makeup that enhances one's appearance. Meanwhile, the growth of concerns like *cakey makeup* and *concealer creasing* showcases the demand for makeup that blends seamlessly with the skin, especially for mature and dry skin types. Compared to other categories, trending concerns and benefits with reliable growth are relatively few alongside makeup, suggesting they change rapidly or that consumers prioritize factors like formulations, aesthetics, or experiences instead.

## MAKEUP CLAIMS BY INCREASE

Trend	Increase↕
highlighting	<b>+4.2K</b>
glowy	<b>+3.0K</b>
non comedogenic	<b>+1.3K</b>

## MAKEUP CONCERNS BY INCREASE

Trend	Increase↕
pimple	<b>+1.9K</b>
cakey makeup	<b>+369.0</b>
concealer creasing	<b>+71.0</b>

**Source:** Google Search data, average monthly search volume increase comparing the past 12 months ending September 2024 vs the 12 months prior (US); Rising Clusters

# 2025 TRENDS: **BODY**



SKINCARE



HAIR



MAKEUP



BATH & BODY



FRAGRANCE

# 2025 PREDICTED TRENDS

Trends per category ranked by predicted growth:

BODY	
Trend	Predicted Growth ↓
<b>african net sponge</b>	<b>+120.6%</b>
<b>magnesium oil</b>	<b>+84.7%</b>
<b>glycolic body lotion</b>	<b>+44.1%</b>
<b>everything shower</b>	<b>+44.0%</b>
<b>turmeric soap</b>	<b>+35.4%</b>
<b>vanilla body wash</b>	<b>+35.2%</b>
<b>vanilla lotion</b>	<b>+31.9%</b>
<b>vitamin c body lotion</b>	<b>+26.8%</b>
<b>unscented soap</b>	<b>+25.8%</b>
<b>vanilla deodorant</b>	<b>+20.0%</b>

FRAGRANCE	
Trend	Predicted Growth ↑
watermelon perfume	+61.7%
caramel perfume	+42.1%
matcha perfume	+41.3%
gourmand fragrances	+33.9%
marshmallow perfume	+33.9%
travel perfume	+33.0%
vanilla perfume	+32.3%
perfume discovery set	+31.9%
oil based perfume	+27.8%
musk perfume	+19.0%



## TREND SPOTLIGHT

# AFRICAN NET SPONGE

### HOW BIG IS THIS TREND

Medium Volume  
22.3K average monthly searches

### HOW COMPETITIVE IS THE SPACE?

No Competition  
0.0 average brand searches

### HOW SIMILAR IS THIS TREND ACROSS PLATFORMS?

High Convergence  
76.9% Convergence

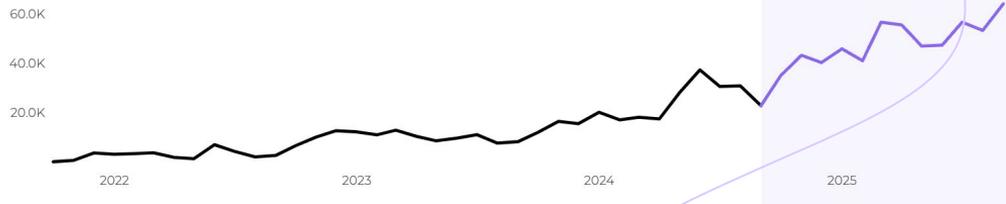
### WILL IT LAST?

Very Likely

Photo source: @bellanomiskincare



African net sponge has surged by +202.0% in average weekly views compared to last year on TikTok. Want more TikTok makeup data? [Book a meeting today.](#)



### STATS:

# +120.6%

PREDICTED 2025  
YEAR-OVER-YEAR  
GROWTH

### TOP SEARCH QUERIES:

*African net sponge*

*African net sponge vs loofah*

### SPATE POV

With high convergence, no competition, a steady positive growth, and a positive predicted growth in the next 12 months, african net sponge is a trend that's sticking around. Top search queries reflect interest from consumers, and questions regarding the difference between african net sponge and loofah. There is an opportunity for brands to capitalize on this interest while providing education to their audience.

# TOP TRENDING BATH & BODY CLAIMS AND CONCERNS



While trends like vanilla body wash and vanilla lotion reflect a need for layerable products and scents, the parallel growing interest in *unscented* and *anti-inflammatory* claims highlights a consumer preference for irritation-free formulations tailored to sensitive skin. Rising search volumes for *perioral dermatitis*, *sweat bumps*, and *heat rash* suggest heightened awareness around skin health and targeted solutions for discomforting issues. Concerns like *postpartum body odor* and *[anti] fungal* suggest an interest in functional body care that addresses both unique life stages and common hygiene issues. The demand for products that address *brown spots* points to a growing awareness of hyperpigmentation, suggesting that consumers are prioritizing body care products with cosmetic as well as therapeutic benefits.

## BATH & BODY CLAIMS BY INCREASE

Trend	Increase↓
unscented	<b>+9.0K</b>
anti inflammatory [cream]	<b>+1.6K</b>

## BATH & BODY CONCERNS BY INCREASE

Trend	Increase↓
perioral dermatitis	<b>+4.4K</b>
sweat bumps	<b>+1.0K</b>
postpartum body odor	<b>+810.0</b>
[anti] fungal	<b>+730.0</b>
heat rash	<b>+384.0</b>
dry patches	<b>+93.0</b>
brown spots	<b>+25.0</b>

**Source:** Google Search data, average monthly search volume increase comparing the past 12 months ending September 2024 vs the 12 months prior (US); Rising Clusters

# 2025 TRENDS: FRAGRANCE



SKINCARE



HAIR



MAKEUP



BATH & BODY



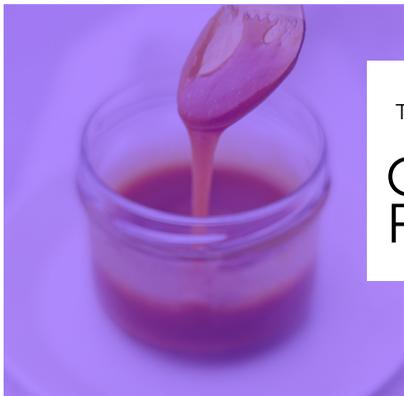
FRAGRANCE

# 2025 PREDICTED TRENDS

Trends per category ranked by predicted growth:

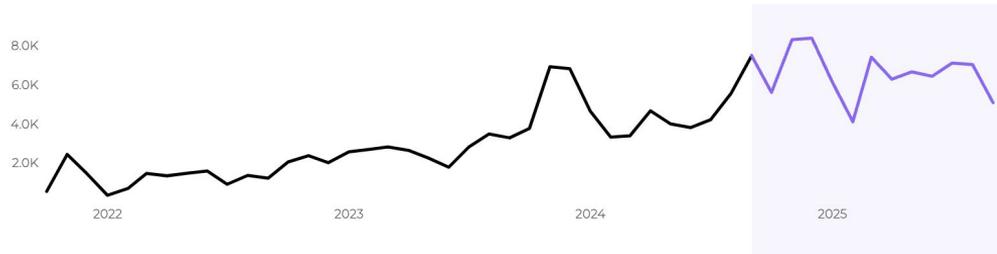
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glycolic body lotion	+44.1%
everything shower	+44.0%
turmeric soap	+35.4%
vanilla body wash	+35.2%
vanilla lotion	+31.9%
vitamin c body lotion	+26.8%
unscented soap	+25.8%
vanilla deodorant	+20.0%

FRAGRANCE	
Trend	Predicted Growth ↓
<b>watermelon perfume</b>	<b>+61.7%</b>
<b>caramel perfume</b>	<b>+42.1%</b>
<b>matcha perfume</b>	<b>+41.3%</b>
<b>gourmand fragrances</b>	<b>+33.9%</b>
<b>marshmallow perfume</b>	<b>+33.9%</b>
<b>travel perfume</b>	<b>+33.0%</b>
<b>vanilla perfume</b>	<b>+32.3%</b>
<b>perfume discovery set</b>	<b>+31.9%</b>
<b>oil based perfume</b>	<b>+27.8%</b>
<b>musk perfume</b>	<b>+19.0%</b>



## TREND SPOTLIGHT

# GOURMAND FRAGRANCES



### HOW BIG IS THIS TREND

Medium Volume  
4.9K average monthly searches

### HOW COMPETITIVE IS THE SPACE?

No Competition  
0.0 average brand searches

### HOW SIMILAR IS THIS TREND ACROSS PLATFORMS?

High Convergence  
63.3% Convergence

### WILL IT LAST?

Very Likely

### STATS:

# +33.9%

PREDICTED 2025  
YEAR-OVER-YEAR  
GROWTH

### TOP SEARCH QUERIES:

*Gourmand scent*

*Gourmand fragrance*

### SPATE POV

Gourmand fragrances are predicted to continue to grow in 2025, an hypothesis further supported by other growing trends such as caramel perfume (+42.1% predicted YoY), marshmallow perfume (+33.9% predicted YoY), and vanilla perfume (+32.3% predicted YoY). This trend reflects a consumer preference for comforting, familiar notes that evoke a sense of warmth and indulgence, highlighting the appeal of relatable, subtly edible scents in personal fragrance choices. The use of a classic perfumery term like gourmand also represents the growing interest consumers have in fragrance education, reflecting a desire to engage with the language behind their scent preferences.

A woman with blonde hair is shown in profile, smelling a clear glass perfume bottle. She is holding another smaller bottle in her other hand. The background is a soft, out-of-focus outdoor setting. The entire image has a purple tint.

# TOP TRENDING FRAGRANCE CLAIMS

The increasing searches for *niche*, and *custom* fragrance products indicate a consumer preference for personalized and connoisseur fragrances that contribute to unique experience. The interest in *bright* and *aromatic* alongside fragrance suggests a trend towards unconventional and diverse scent profiles. Searches for *[non] toxic* highlight a growing awareness of ingredient safety when it comes to personal fragrance. The focus on *lasting* benefits alongside fragrance supports the consumer trend toward products that last longer.

## FRAGRANCE CLAIMS BY INCREASE

Trend	Increase↓
bright	<b>+1.2K</b>
lasting	<b>+566.0</b>
niche	<b>+554.0</b>
[non] toxic	<b>+433.0</b>
custom	<b>+454.0</b>
aromatic	<b>+100.0</b>

# SPATE POV

From the skinification of body care to the rise of texture-driven experiences and fragrance layering, key trends for 2025 highlight the demand for innovative, multi-functional products that simplify routines while delivering polished results.

**Body Care Skinification.** Whether ingredients (ie, glycolic acid) or concerns (ie, hyperpigmentation), we see an increasing crossover between body care and skincare, with products such as glycolic body lotion, vitamin C lotion, and turmeric soap. This blending of categories not only expands the body care market but also offers brands an opportunity to innovate with multi-benefit products that address comprehensive skincare goals from head to toe.

**Textures in Focus.** Texture-driven, sensorial experiences are capturing consumers' attention across beauty categories. Products like collagen patches and snail serum showcase a growing interest in jelly textures, while peel-off lip stains offer a uniquely "satisfying" application experience. Brands should capitalize on this and experiment with textures to offer singular experiences.

**Layering Fragrance Routines are Bringing Body Care and Fragrance Closer.** Layering fragrances has become a routine for many consumers, and a trend that continues to grow. This phenomenon led to a growing overlap between fragrance and body care scents, notably gourmand scents and vanilla. Both industries can benefit from closely monitoring each other to stay at the forefront of emerging trends. At the same time, with increasing interest in unscented formulas, brands must find a balance that caters to various consumers' desire for both experiential products and skin-friendly options.

**Effortless, yet Perfectly Polished.** Consumers are increasingly interested in solutions that enhance a natural look while streamlining beauty routines, aligning with the "effortless but elevated" aesthetic, as seen with trends such as heatless hair curler, thermal brush, brow stain, tubing mascara and peel off lip stain. These trends reflect a need for low-maintenance beauty routines, and products that won't need to be reapplied throughout the day. Brands should focus on developing multi-functional, time-saving products that simplify beauty routines while delivering professional-quality results.

# [ GRADING 2024 PREDICTIONS ]

Tinted lip oil is showing +19.0% year-over-year growth compared to last year on TikTok\*. Want more TikTok makeup data? [Book a meeting today.](#)



# 2024 TREND REVIEW: SKINCARE

## SKINCARE: 6 OUT OF 10

Trend	YOY ↓
oil based cleanser	53.2%
red light therapy	40.7%
skin barrier	26.1%
oily skin cleanser	22.2%
hyaluronic acid moisturizer	9.0%
dermatitis	2.3%
pore clogging	-11.5%
mature skin	-16.4%
lip oil	-28.1%
diamondglow facial	-46.3%

## REFLECTION

In 2024, consumer skincare trends revealed a strong demand for products tailored to specific skin types and concerns, highlighted by rising interest in products like oily skin cleansers and oil-based cleansers, and even treatment such as red light therapy.

The focus on skin barrier health continued to grow, with consumers seeking solutions that repair and protect their skin without causing irritation. While lip oil didn't meet expectations, tinted lip oil's sustained positive trajectory reflects consumers' need for lip care products that subtly enhance lips' appearance.

While DiamondGlow facial appeared poised for strong growth at the start of 2024, it has been outpaced by gentler chemical exfoliation options like BioRePeel, reflecting a broader consumer shift toward acid-based treatments over more abrasive methods like microdermabrasion.

Interest in skincare for mature skin has declined in 2024, replaced by a growing focus on mature skin makeup, reflecting a shift in how consumers address aging-related concerns. Furthermore, as consumers become more knowledgeable, they expect greater transparency around ingredients and their suitability for different skin needs. This presents brands with an opportunity to offer deeper education and clarity, helping consumers make informed, personalized choices.

# 2024 TREND REVIEW: HAIR

## HAIR: 5 OUT OF 10

Trend	YOY ↓
texturizing powder	147.6%
rosemary shampoo	41.4%
micro bangs	35.3%
hair glaze	7.4%
rosemary oil hair treatment	1.3%
french curl braids*	-5.3%
heatless curls	-13.4%
head spa	-26.9%
shampoo bar	-30.2%
90s blowout	-59.5%

## REFLECTION

While some hair micro trend predictions have fallen short of expectations, it's worth noting that most of the declining year-over-year trends' aesthetics and concepts still demonstrate positive overall growth. For instance, while trends like '90s blowouts and heatless curls may be waning, the broader appeal of voluminous hair—illustrated by the rise of thermal brush—continues to gain traction. On the other hand, hair health and growth, with rosemary oil leading the charge, remain key consumer interests, and the decline of hair spa coincides with growth in scalp spa searches, highlighting the importance of terminology. Brands can respond by offering products that cater to both hair and scalp health while staying mindful of style preferences and evolving language.

As beauty trends evolve, so does the lexicon. Platforms like TikTok and broader cultural movements, both online and offline, play a pivotal role in reshaping consumer language throughout the year. This dynamic shift in language keeps trends feeling fresh and relevant, as consumers actively engage with content and redefine beauty concepts. For brands, this presents an opportunity to stay ahead by adapting to these shifts and even contributing to the development of new terminology, keeping their offerings aligned with the ever-evolving digital culture.

# 2024 TREND REVIEW: MAKEUP

## MAKEUP: 7 OUT OF 10

Trend	YOY ↓
cluster lashes	131.1%
tubing mascara	119.0%
silicone primer	86.0%
water based foundation	76.6%
skin tint	23.7%
diy lash extension	7.3%
face bronzer stick	3.9%
douyin makeup*	-1.1%
setting powder	-8.2%
blush stick	-10.1%

## REFLECTION

In 2024, consumer makeup trends reflected a need for long-lasting and comfortable products across categories, whether it is for the face – ie, silicone primer, skin tint — or for the eyes — ie, tubing mascara.

Eye makeup trends presented an interesting dichotomy: tubing mascaras, which deliver defined, smudge-free lashes, gained popularity alongside the bolder appeal of cluster lashes for a more intense effect. Stick formats also continued to attract attention.

Brands can capitalize on this momentum by developing makeup solutions that combine durability with comfort, catering to consumers seeking both subtle and statement looks.

# 2024 TREND REVIEW: BATH & BODY

## BODY: 8 OUT OF 9

Trend	YOY ↓
vanilla lotion	53.2%
antibacterial body wash	15.8%
athlete's foot cream	12.1%
shower filter	11.3%
cold plunge	8.3%
body shimmer oil	6.7%
retinol body lotion	4.1%
silicone body scrubber	0.4%
aluminum free deodorant	-22.5%

## REFLECTION

In 2024, consumer body care trends revealed a balance between indulgence — ie, vanilla body lotion — and functionality — ie, athlete's foot cream. Demand for tools that exfoliate and smooth the skin, such as silicone body scrubbers and shower filters, pointed to consumers' growing interest in achieving smoother skin.

The continued "skinification" of body care — evidenced by the rise of ingredient-focused products like retinol body lotion — highlighted the increasing overlap between skincare and body care. Brands can respond by crafting body care lines that merge the sensory appeal of self-care with clinical-grade ingredients, offering products that address both daily maintenance and targeted concerns.

# 2024 TREND REVIEW: FRAGRANCE

## FRAGRANCE: 5 OUT OF 8

Trend	YOY ↓
travel perfume	38.4%
vanilla perfume	36.8%
perfume subscription	28.9%
cherry perfume	23.1%
musk perfume	15.1%
amber perfume	-6.7%
pheromone perfume	-8.9%
body spray	-10.2%

## REFLECTION

As fragrance becomes an increasingly integrated part of consumers' daily routines, 2024 trends reflect a growing interest in formats that are convenient and travel-friendly such as travel perfumes, as well as formats that encourage experimentation, like perfume discovery sets. Gourmand scents, such as vanilla and cherry, continue to captivate attention, reinforcing the appeal of relatable, enticing fragrances.

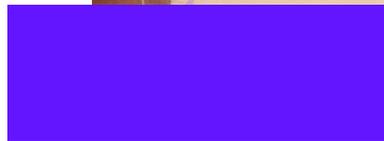
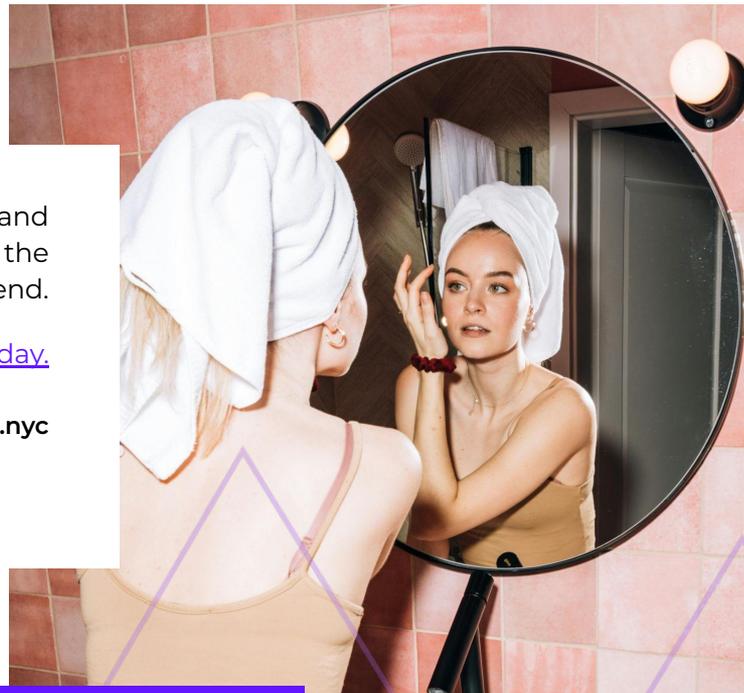
Brands can engage consumers by encouraging both ritual and discovery in fragrance, offering options that fit seamlessly into daily routines while inviting exploration. Lastly, expanding into new edible-inspired notes can further tap into the sensory allure that resonates strongly with today's fragrance enthusiasts.

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60M TikTok videos to spot the  
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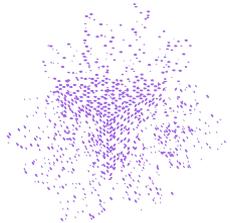
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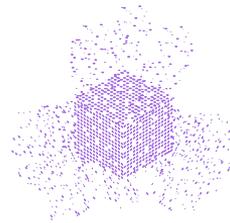
# [ APPENDIX ]

# SPATE METHODOLOGY

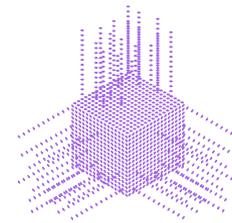
Spate is an innovative data platform that allows users to discover and detect trends across google search and TikTok. The Spate dashboard analyzes over **20 billion search signals** and over **60 million beauty-related TikTok videos** across the Globe to answer three crucial questions for the beauty and wellness industry. What's the next big trend? Who's owning the space? How to position the trend?



20+ billion beauty-related search and TikTok signals



Artificial Intelligence for identifying trend clusters



Trends classification for insights and implications

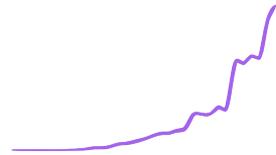


# THE METRICS: DATA TRANSLATION

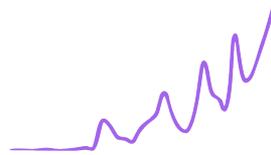
- *Volume:*  
Monthly search volume averaged over the last 12 months
- *Increase:*  
The difference in the average search volume of the past 12 months and the average of the previous 12 months
- *Predicted Growth:*  
Predicted 12 months vs. actual 12 months growth rate

# CLUSTERING EXPLAINED

To identify top trends, we categorize Spate data into six different clusters based on similar trend behaviors.



SUSTAINED RISERS



SEASONAL RISERS



RISING STARS



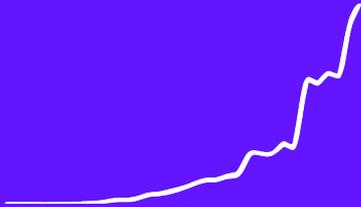
SUSTAINED DECLINERS



SEASONAL DECLINERS

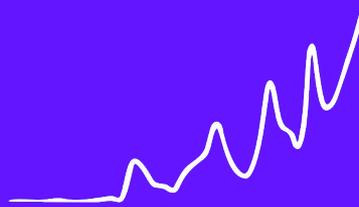


FALLING STARS



### SUSTAINED RISERS

Steady growth over the past years, these trends are safe bets



### SEASONAL RISERS

Seasonal trends that are likely to come back even stronger



### RISING STARS

Sudden growth within the past months, these trends are riskier

# HEALTH STATS EXPLAINED



## HOW BIG IS THIS TREND

This metric assesses the size of a trend using monthly Search Volume relative to its category.

**Very High Volume** trends are well established trends among consumers.

**High Volume** trends are those with high consumer awareness.

**Medium Volume** trends are fairly well known by consumers.

**Low Volume** trends have low consumer awareness.

**Very Low Volume** trends represent emerging niche opportunities.



## HOW COMPETITIVE IS THE SPACE?

This metric assesses how much of organic search are brands-related. It represents the top of mind brands that consumers search alongside a trend.

**Very Low / No Competition** indicates there are little to no brand searches alongside a trend.

**Low Competition** indicates that there are a few brand searches alongside a trend.

**Medium Competition** indicates that there are some brand searches alongside a trend.

**High Competition** indicates that there are several brand searches alongside a trend.

**Very High Competition** indicates there are many brand searches.



## HOW SIMILAR IS THIS TREND ACROSS PLATFORMS?

This metric compares how a trend is performing on TikTok versus Google Search.

**"Very High Convergence"** indicates a trend that is performing very similarly across both TikTok and Google Search.

**"High Convergence"** indicates a trend that is performing similarly across both TikTok and Google Search.

**"Medium Convergence"** indicates that a trend is performing somewhat similarly across both TikTok and Google Search.

**"Low Convergence"** indicates that a trend is performing somewhat differently across both TikTok and Google Search.

**"Very Low Convergence"** indicates that a trend is performing very differently across both TikTok and Google Search.



## WILL IT LAST?

This metric assesses the likelihood that a trend will continue to grow within the next 12 months.

**Very Likely** indicates a >90% confidence that a trend is predicted to grow.

**Likely** indicates with strong confidence that a trend is predicted to grow.

**Uncertain** indicates an equal likelihood that a trend is predicted to grow or decline.

**Unlikely** indicates with strong confidence that a trend is predicted to decline.

**Very Unlikely** indicates a >90% confidence that a trend is predicted to decline.