



The Clean Side Of Mica

A White Paper On Sustainability In Beauty and
Responsible Ingredient Sourcing

| preen.me

The beauty industry is cleaning up its act.

Empowered consumers use social media as a weapon to translate values into buying behaviors. Consumers now purchase with a purpose, and brands are responding with greater transparency.

Mica, an ingredient in many cosmetic and personal care products, is an example of consumer values in action.

Recent headlines have focused on mica sourced in socially and economically challenged regions associated with corrupt supply chains and a high incidence of child labor. But there is a clean side to the mica story. From ingredient manufacturers to brands, the value chain is being reshaped to prioritize ingredients that are purposeful to the product and sourced responsibly.

Today's consumers are using their dollars to fuel this value chain evolution.

In turn, companies are starting to prioritize responsible sourcing in the hopes of fulfilling the promise of fully transparent supply chains.

The following paper details why consumers care about responsible sourcing and why this story begins with Mica.

RESPONSIBLE SOURCING | FROM TREND TO ACTION



BEAUTY 101

THE INDUSTRY



BEAUTY 201

THE SOCIAL CONVERSATION



BEAUTY 301

INGREDIENT LABELS + MICA



BEAUTY 401

THE FUTURE



Beauty 101

THE INDUSTRY





The average woman in the US spends \$300,000 on makeup in her lifetime⁽¹⁾

59% of consumers would be interested in trying new products from other brands if they were clean⁽²⁾

There's probably a time five years from now where, if you're not natural or clean, you're not on the shelf⁽³⁾

- Rich Gersten, Tengram Capital

Beauty industry trends reflect consumer demand for sustainability.

Industry Composition		3 Big Shifts	'Sustainable' Snapshot
Sustainable	<div>Conventional<div></div><div>Compliance with federal and state laws.</div></div>	<div>Nielsen states the future of beauty will be driven by 3 systemic shifts:</div> <div><div>1. Natural</div><div>2. Personal</div><div>3. Connected</div></div> <div>As natural continues to outperform conventional, it is priority #1.</div> <div>(5)</div>	<div>Size</div> <div>\$22B by 2024 (#141 on today's Fortune 500)</div>
	<div>Clean<div></div><div>Focused on ingredients that are demonstrably safe for human use. Prioritize human health endpoints.</div></div>		<div>\$54B by 2027 (#60 on today's Fortune 500)</div>
	<div>Simple<div></div><div>Recognizable and limited ingredients.</div></div>		<div>Growth</div> <div>10% for natural vs. 3.8% for global beauty</div> <div>(6,7,8)</div>
	<div>Certified<div></div><div>Non-GMO, USDA Organic, Fair Trade, cruelty free</div><div>(4)</div></div>		

Why Consumers Care

Sources in appendix	Over 120 billion units of plastic packaging are used by the cosmetics industry annually. As much as 70% of this plastic waste isn't recycled. ⁽⁹⁾	Scented goods (many of them personal care products) emit the same amount of chemical vapors as car emissions. ^(10, 11)	Of 70,000 cosmetics products listed on the Environmental Working Group's database, only 1,250 do not carry chemicals of concern. ^(12.1)	The US has banned 11 chemical cosmetic ingredients. By comparison, the EU has banned 1,328 . ^(12.2) 5
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Consumers care about sustainability and they have the power to affect change.

The Cruelty Free Movement Case Study

The cruelty free movement encompasses the use of animals in product testing as well as animal-derived ingredients.

(1) Consumers

79% of American adults across all age groups and political views support legislation to end animal testing for cosmetics.⁽¹³⁾

Sources in appendix

(2) Legislation

CA, the world's fifth largest economy, passes legislation that ends the sale of cosmetics tested on animals.⁽¹⁴⁾

NY, NJ, and VA follow suit, covering $\frac{1}{4}$ of the US population.⁽¹⁴⁾

(3) Corporations

Coty | 5th Largest Beauty Company
CoverGirl brand is certified **cruelty free** – the biggest brand to date.⁽¹⁵⁾

Unilever | 2nd Largest Beauty Company
Unilever announces support of a global ban on animal tested cosmetics. Dove brand is certified **cruelty free**.⁽¹⁶⁾



As consumers vote with their dollars, brands and retailers respond through their product offerings.

Consumers

Globally, millennials
**will pay an average of
18% more**
for clean beauty
products⁽¹⁷⁾

In the US
**55% of women would pay
more**
for organic and beauty
personal care products⁽¹⁸⁾

Ultra natural buyers
**spend 80%
more**
in total beauty than the
average customer⁽¹⁹⁾

CREDO BEAUTY

The leading Clean Beauty
retailer receives ~200 new
products a month from brands
hoping to get shelf space⁽²⁰⁾

BEAUTYCOUNTER

The leading Clean Beauty brand
entered the market with 11
products and now offers close to
170. A recent launch sold out of
25,000 units in 12 hours

Brands are mobilizing new technologies to operate transparently and to build consumer trust.

Blockchain: The Promise Of Transparency

Blockchain Overview:

Consumers crave more information - about ingredient origins, product manufacturing, and how materials are sourced and transported.

Complex supply chains often lack transparency, making it difficult to identify and address illegal and unethical practices.

Blockchain can map entire supply chains, with secure records of all transactions. This information is stored digitally and can be accessed easily by consumers.

Sources in appendix

(21)

Blockchain In Use:

Walmart tracks pork sourced from China, recording the origin, process, storage, and sell-by-date of each piece of meat.

De Beers tracks stones from point of extraction to point of sale, ensuring the company avoids 'conflict' or 'blood diamonds.'

Starbucks tracks coffee from bean to cup. Consumers can access this information on the Starbucks app.

Ford is testing blockchain to trace and validate ethically-sourced cobalt for its EV batteries.

(21, 22, 23)



MATERIAL



PRODUCER



LOGISTICS



WHOLESALE



RETAILER



CONSUMER



Beauty 201

THE SOCIAL CONVERSATION

In a 12,000-consumer survey, 81% indicated posts from friends directly influenced their purchase decisions; 78% were influenced by company posts

Nearly 1 in 3 dollars spent on beauty products in the U.S. today is spent online⁽²⁴⁾

Social media serves as a magnifying glass for consumer trends in the beauty industry.

WHY SOCIAL MEDIA

1 Instagram usage grew 10x over 5 years

2 Early adapter, influencer, and consumer conversations help provide a read on the market

3 Social media helps incubate trends to a tipping point

WHY BEAUTY

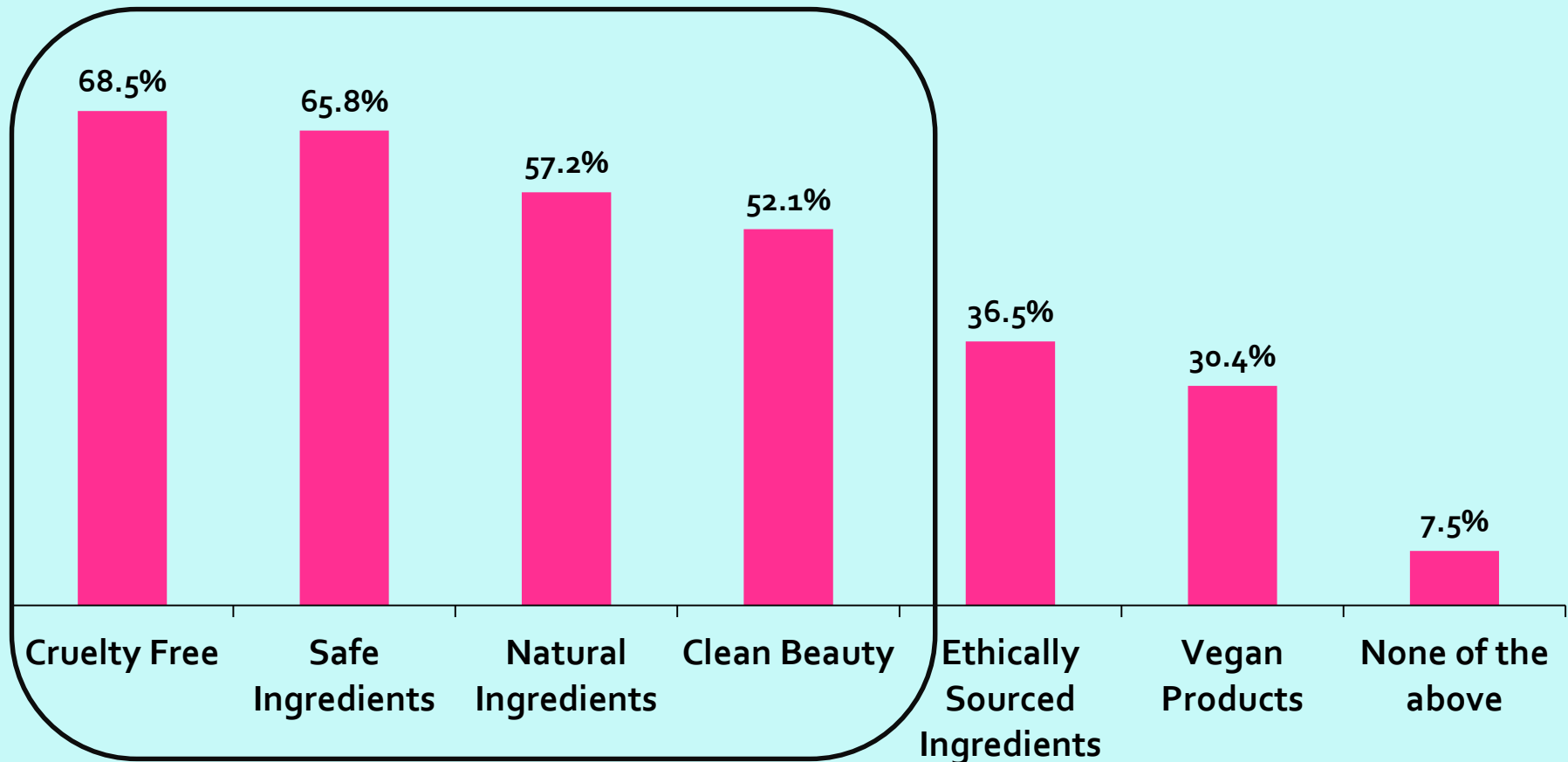
4 Half the growth in beauty is coming from online channels

5 Nielsen has found that consumer spending on beauty products has shifted online faster and greater than nearly every other CPG category.

6 Social media garners more influence on the path-to-purchase in cosmetics than just about any other category.

Beauty consumers prioritize four sustainability themes.

Which of the following beauty trends guide your purchasing decisions?



N=807

These themes echo across social media.

(1) Animal-Free 795K Total Posts



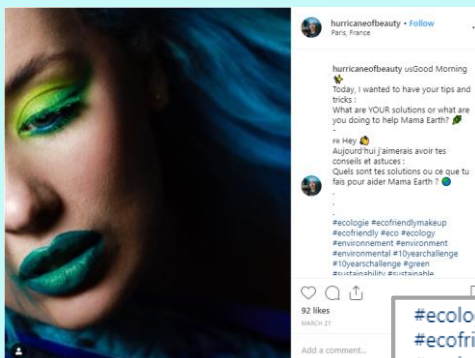
vegan-
friendly,
cruelty /
animal testing
free

(2) Natural & Organic 642K Total Posts



natural and
organic
ingredients,
plant-based,
mineral beauty

(3) Eco-Friendly 415K Total Posts



plastic-free,
recyclable, zero-
waste,
biodegradable,
green, etc.

(4) Clean 397K Total Posts



paraben-free,
non-toxic,
sulfate-free,
etc.

The sustainability conversation on Instagram is big and growing.

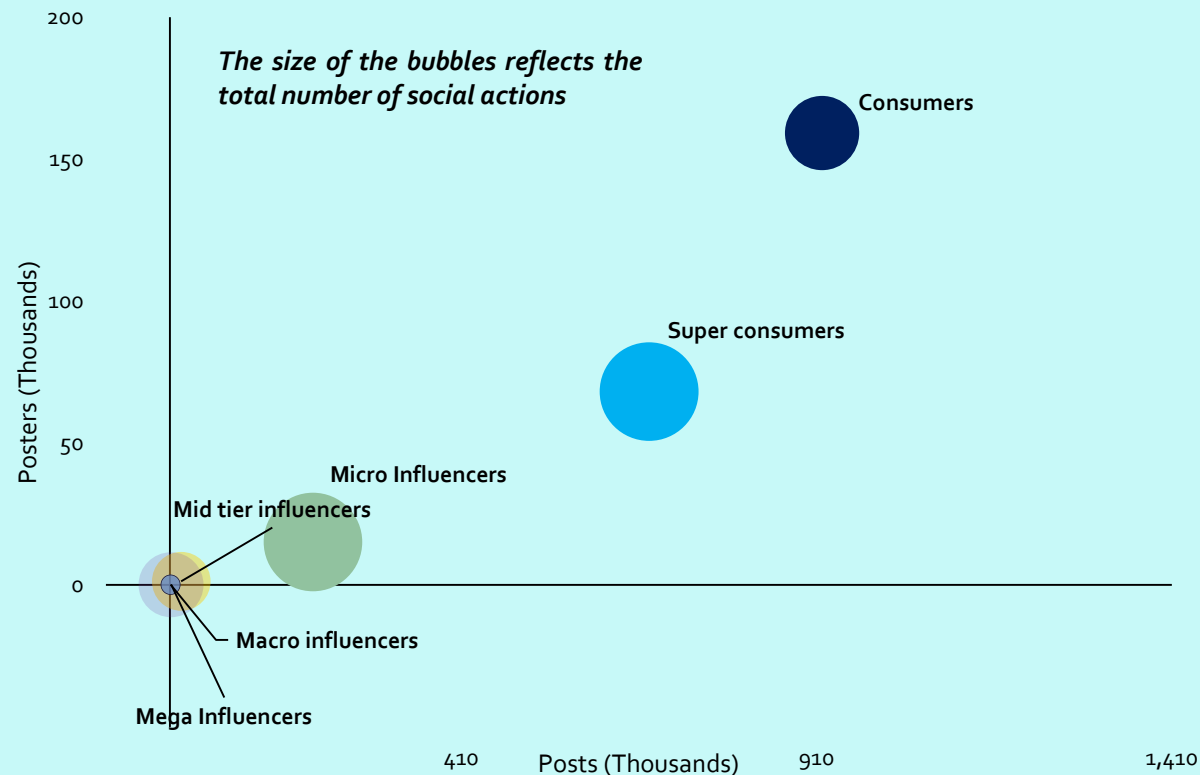
The Total Sustainability Conversation | October 2018 - March 2019

**20%
Growth**

**1.8M
Posts**

**239K
People**

**227M
Social Actions**



53% of consumers feel they can make a difference based on their own purchasing decisions.⁽²⁸⁾

As the **cruelty free** case study shows, when consumers rally, they can affect change. The grassroots nature of the conversation suggests it hasn't reached its tipping point yet.

Consumers post passionately and frequently.

Consumer Posting Snapshot

Post Activity / Period	Total Sustainability	Animal Free	Natural & Organic	Eco-Friendly	Clean	Benchmark: an average poster
% Posters Posting 10 + times	15%	14%	12%	21%	15%	6.9%
Average Posts Per Poster	7.5	7.4	6.4	9.5	6.8	4.8

The intensity and engagement of sustainability posters suggests that if unlocked, social media can be a powerful platform to drive industry change.

Mega-influencer Snapshot: High Engagement Is The Norm



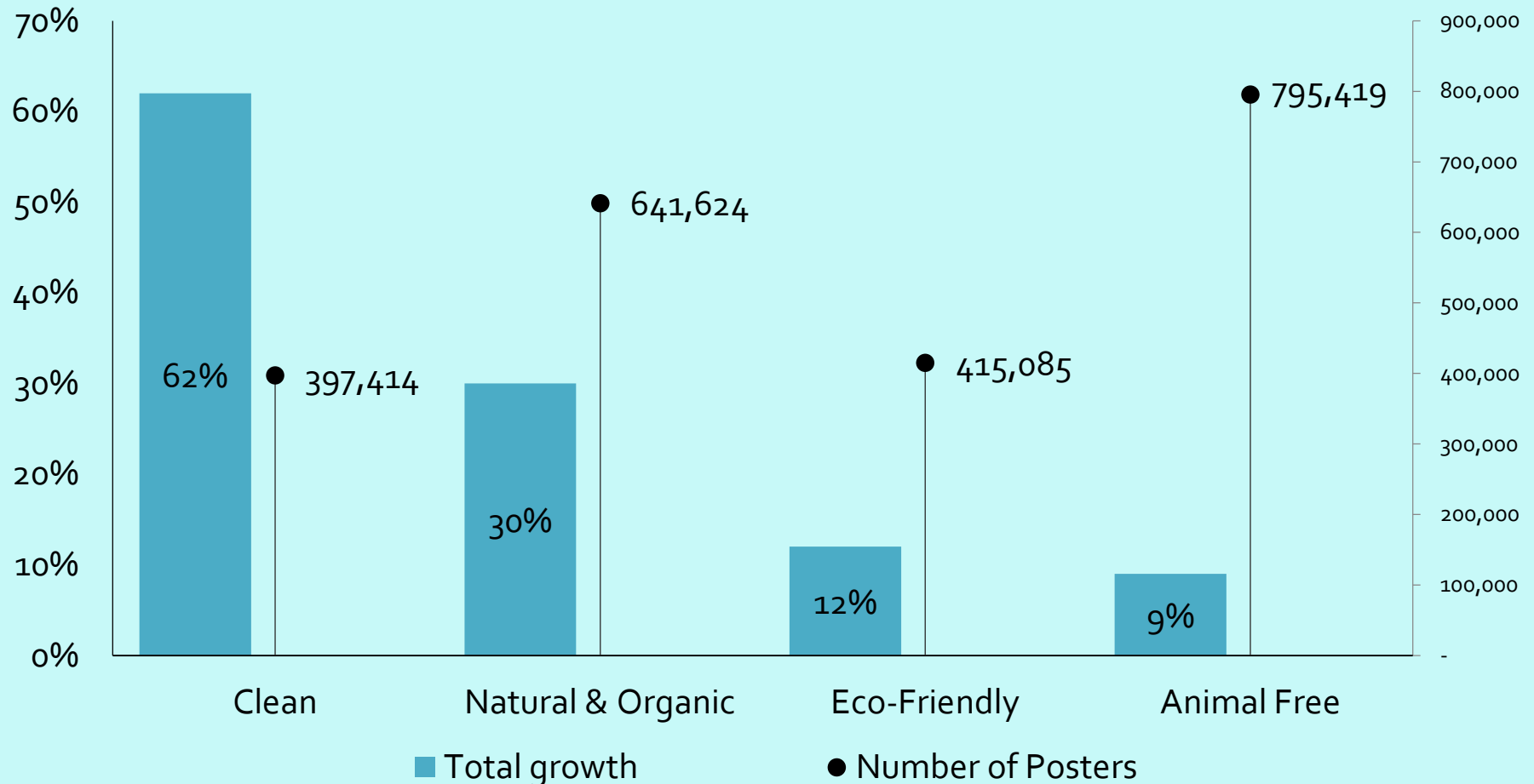
Beyond the consumer conversation, mega-influencers (>1M followers) and celebrities also have a powerful voice driving considerable engagement. The average likes / post for these influencers is 65,661.

Clean Beauty stands out as the fastest-growing conversation within sustainability.

6 Month Conversation Growth | The Clean Beauty Conversation Grew 62%

October 2018 – March 2019

Total Sustainability Growth: 20%

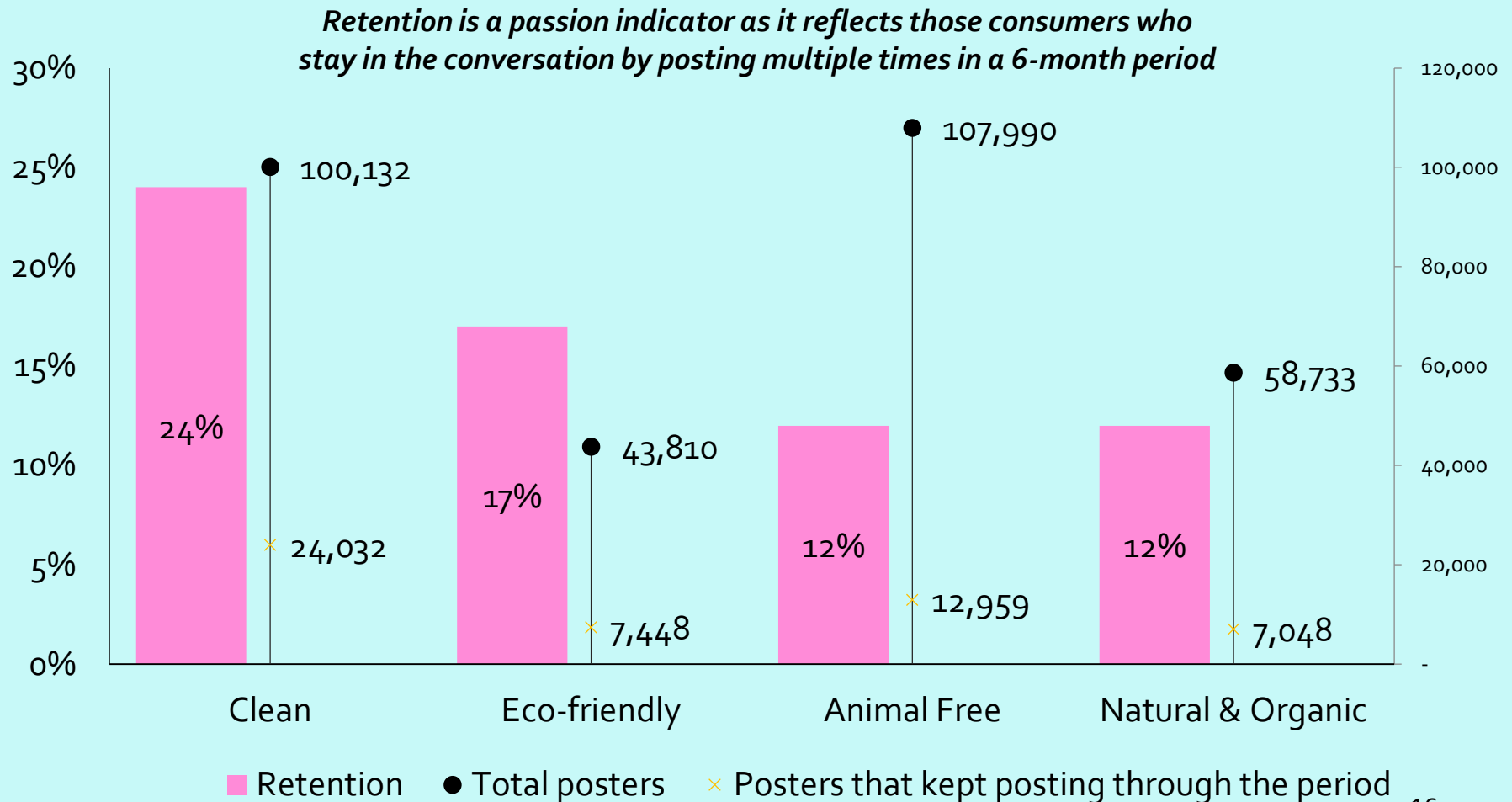


Passionate Clean Beauty posters post more frequently than others.

6 Month Conversation Retention | 24% of Clean Beauty Posters Still In Conversation

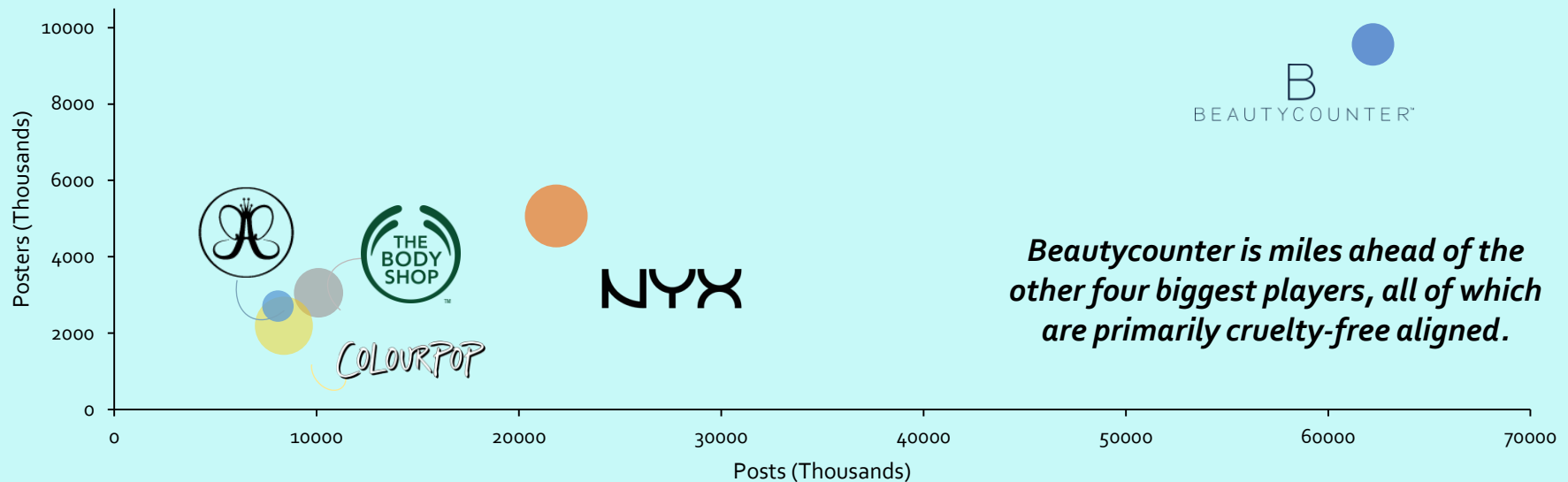
October 2018 – March 2019

Total Sustainability Retention: 12%



Beautycounter, a Clean Beauty brand, dominates the sustainability conversation on Instagram.

The Top 5 Brands Driving The Sustainable Beauty Conversation



An Expansive Reach in the Clean Beauty Conversation:

Launched in 2013, Beautycounter is the pioneer in the Clean Beauty movement. Its mission is to get safer products into the hands of everyone through formulating with safer ingredients, educating consumers, and advocating for more health-protective legislation on both the federal and state levels.

As a direct-to-consumer brand, Beautycounter has a community of approximately 45,000 independent Consultants throughout in the US and Canada. The Beautycounter community serves as an unparalleled grassroots network for its education and advocacy work. Beautycounter was recently listed as Google's #1 trending beauty brand of 2018. Most Beautycounter Consultants utilize Instagram to promote products and engage with their customer bases. Beautycounter leverages an omni-channel retail strategy, offering direct sales through Consultants, online through the company website, through strategic partnerships, and at brick-and-mortar locations.⁽²⁹⁾



Beauty 301

INGREDIENT LABELS + MICA

Every day on average...

12 personal care products
used by US women⁽³⁰⁾

168 unique ingredients
encountered by US
women⁽³⁰⁾

1 in 5 adults exposed to the
top 7 carcinogens in
personal care products⁽³¹⁾

There is a push by the customer for brands to be clearer and to help them navigate the ingredient list⁽³²⁾

- Frédéric Benqué, Nextworld

Nearly all consumers read ingredient labels, which influences their purchasing decisions.

94% of consumers read the ingredient label

N=807

Do you read the ingredient labels on your beauty products?

ALWAYS

49.5%

OCCASIONALLY

44.7%

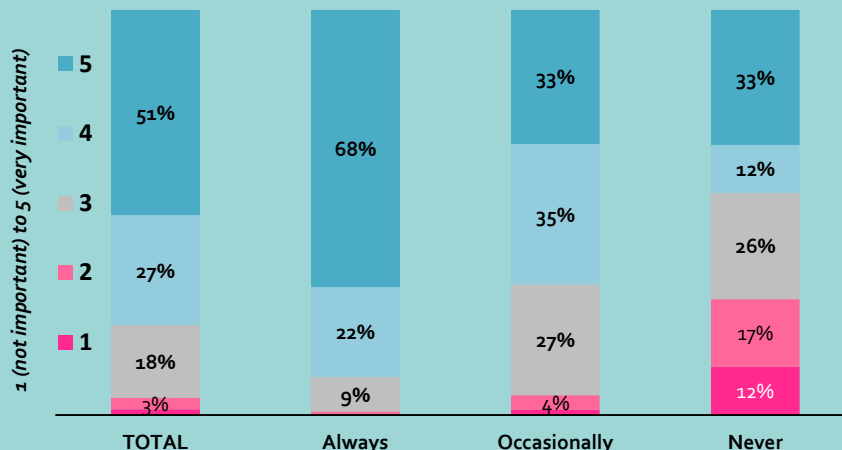
NEVER

5.8%

Greater interest in ingredient sourcing is correlated with reading ingredient labels

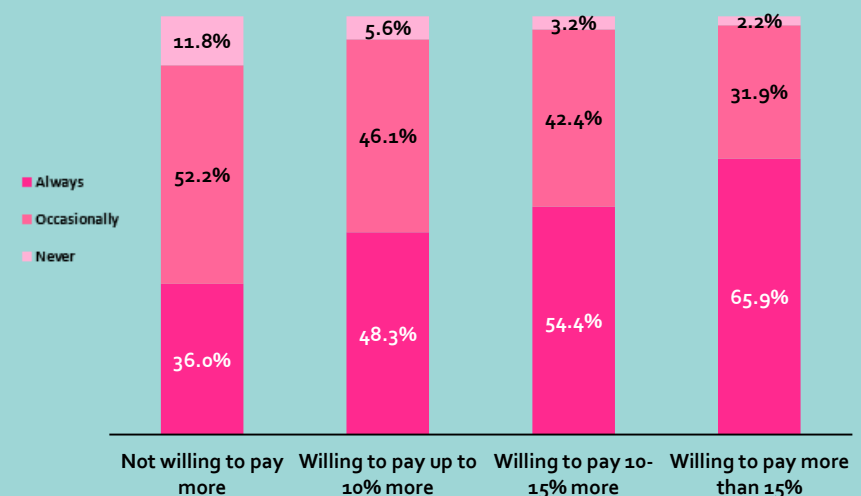
Reading ingredient labels is correlated with a greater willingness to pay

How important is ingredient transparency/ingredient stories to your buying decisions?



How Often Product Label Is Read

Are you willing to pay more to ensure the ingredients in your beauty products were sourced sustainably?



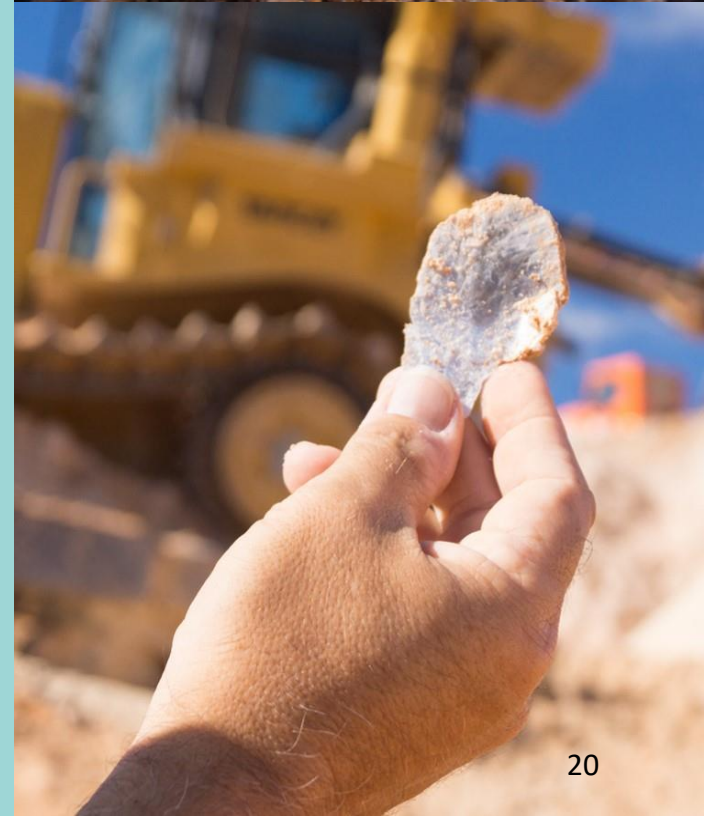
Not willing to pay more Willing to pay up to 10% more Willing to pay 10-15% more Willing to pay more than 15% more

Natural mica is a common ingredient in beauty products.

Mica is a group of 37 crystalline minerals that can be ground and coated to make a sparkling powder. It has dozens of commercial applications, adding shimmer to car paints, cosmetics, toothpaste, and plastics. It is also known as potassium aluminum silicate.⁽³³⁾

The natural mica market is on pace to reach \$670M by 2024. Roughly 18% of the global supply goes to the beauty industry. India has the largest natural mica deposits of anywhere in the world.⁽³⁴⁾

Natural mica is one of the most common ingredients in beauty products and is listed on ingredient labels as “mica.” Mica is typically used in beauty products as a filler and/or an effect pigment. As an effect pigment, it adds shimmering effects and color to cosmetic and personal care applications. Mica is safe to use and is a globally approved ingredient.



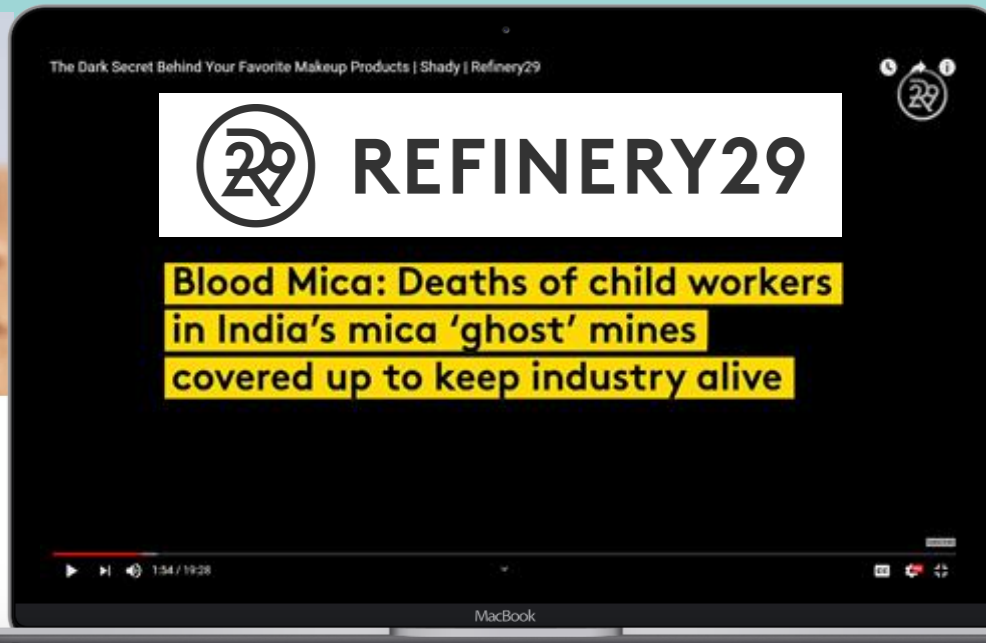
To date, only mica's dirty side has been brought to light.



The Makeup Industry's Darkest Secret Is Hiding In Your Makeup Bag

Nine thousand miles away, in a remote village in India, children are risking their lives to bring you the shimmer in your makeup.

LEXY LESSACK
MAY 4, 2019, 10:55 AM



The Evolution of The Dirty Mica Conversation

Refinery29 breaks the dirty Mica story on May 4, 2019.

With a global audience of over 250M people, Refinery29 aims to change the way content speaks to and represents women.⁽³⁵⁾

Sources in appendix

Mica has been covered widely by the European press since 2015 ([British Vogue](#), [Wired](#), [The Guardian](#), [Spiegel](#)), but reader engagement has been tepid at best.⁽³⁶⁾

The recent Refinery29 coverage upended the conversation in a new social-first era for a female, millennial, and empowered social-first audience – an audience that was ready to make a difference. The social metrics (YouTube) speak to the efficacy of that strategy.^(37, 38)

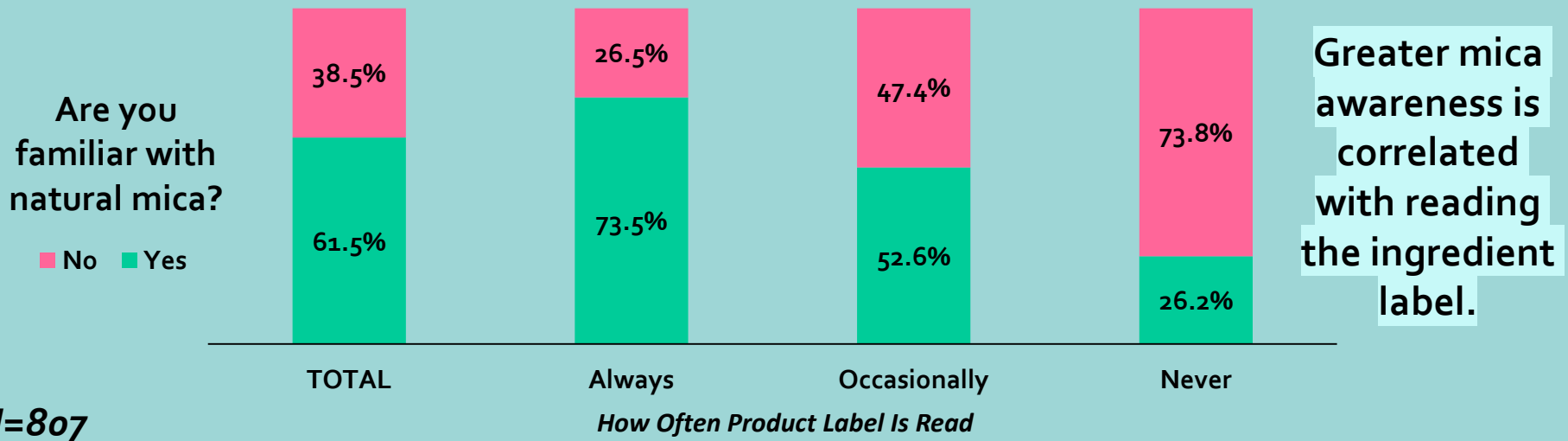
Total Views	Comments	Likes
>5.5M	>18K	>235K

Child labor remains prevalent in mica mining in the Indian states of Jharkhand and Bihar, which are responsible for 25% of global production combined.

Up to **20,000 children are estimated to work in mica mines**, around 90% of which are illegal.⁽³⁹⁾

As awareness grows, consumers will opt for sustainably sourced mica.

Consumer Awareness: Natural Mica



Consumer Awareness: Mica Sourcing

Only 23% of surveyed eco influencers **were aware** of unethical Mica sourcing...

...But as soon as they learned about the issue, **77% wanted to know more** about where and how the mica in their products was sourced.

It's a thing that will eventually have to come out. All of us are pretty educated and **yet none of us knew**. And if we all love animals, we definitely love people...This will be a huge deal. I mean, for me it is now.

Focus Group Participant



Beauty 401

THE FUTURE

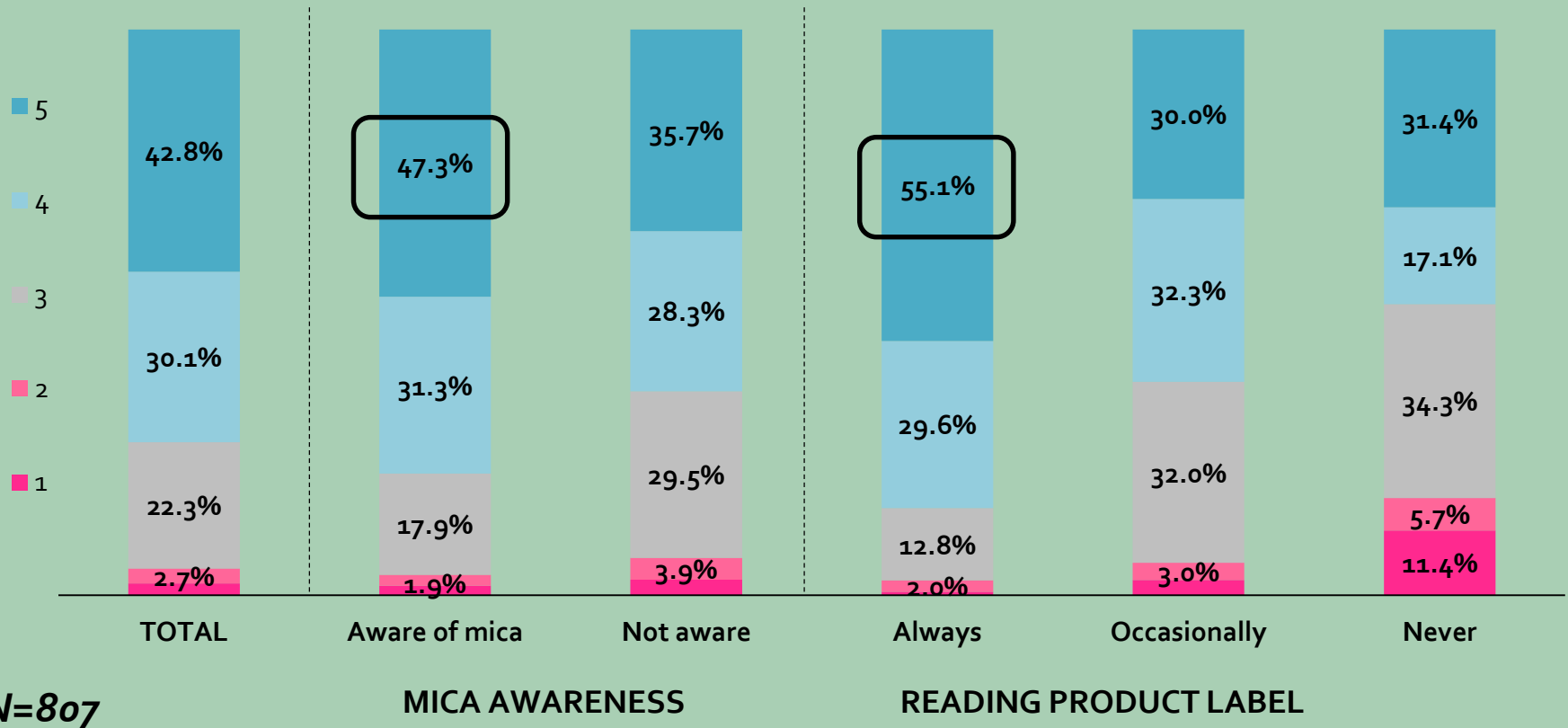
Beauty brands dedicated to cleaning up their mica supply chains have struggled due to the difficulty in tracing the true origins of the mineral. Mica is bought by intermediaries, resulting in the mixing of legal and illegal mica which is then sold on to processing companies.⁽⁴⁰⁾

Consumers are spending more than ever on products likely to include child labor in their supply chains—\$798.2 million, up 136% over the past 10 years.

Though cruelty-free makeup has long been about animal testing, it's high time cruelty free is also about child labor.⁽⁴¹⁾

The more respondents know about mica and read ingredient labels, the more they care about transparent value chains.

How important is it for you to purchase beauty products that follow a simplified and transparent value chain? (5 – Very Important | 1 – Not Important)



BASF Colors & Effects is a leading effect pigment supplier, sourcing 100% of its natural mica from the USA.



**BASF owns and operates a natural mica mine in Hartwell, GA, USA.
Each mica flake confirms three core principles:**

ETHICAL	TRANSPARENT	ENVIRONMENTALLY CONSCIOUS
<ul style="list-style-type: none">• Zero child labor• Standout safety record• Mining practices are regulated by the US federal government	<ul style="list-style-type: none">• Material tracking for all mica batches• Controlled supply chain• Open for customer site tour and audits	<ul style="list-style-type: none">• Chemical-free mining• Water recycling• Land restoration and reforestation (42)
50% of surveyed consumers associate sustainable ingredients with 'ethical sourcing'	90% of surveyed consumers will stop purchasing from brands that lack transparency ⁽⁴³⁾	65% of surveyed consumers associate sustainable ingredients with environmental impact

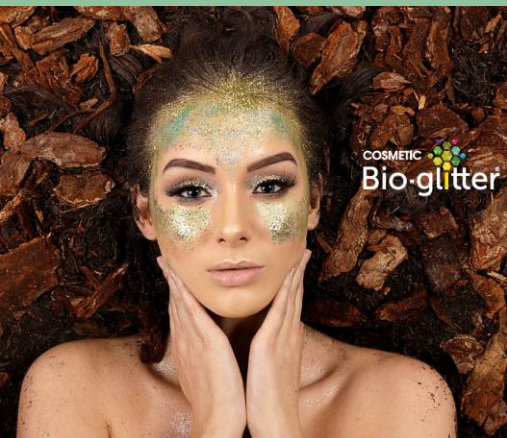
Although BASF Colors & Effects sources all mica from the USA, they are also a member of the Responsible Mica Initiative- committed to eradicating child labor and unacceptable working conditions in the Indian mica supply chain.

You can find out more about mica mining and processing in the USA, by visiting the BASF Colors & Effects website: [Clean Mica](#)

#GuiltFreeGlitter - Bioglitter™ is tackling the micro plastic epidemic, while also focusing on responsibly sourced natural mica.

Bioglitter™ offers the world's first and only plastic free and TÜV certified biodegradable glitter. To create the opal-like finish of the Bioglitter™ PURE range, the substrate, unique to Bioglitter™, is coated with cosmetic grade effect pigments. The natural mica based effect pigments are made with US sourced mica.

(44)



COSMETIC
Bio-glitter®
PURE



“When you offer a sustainable alternative, there is a higher expectation from customers. We get a lot of questions about our certifications, process, and raw materials. Lately, mica has been a popular inquiry. Using US sourced mica makes for an easy answer - we know exactly where and how it's mined. Peace of mind.”

-Stephen Cotton, Commercial Director, Bioglitter™ - Ronald Britton Ltd

You can find out more by visiting Ronald Brittons' website – [DiscoverBioglitter](#)

In 2018, Beautycounter began a deeper dive into Responsible Sourcing. Its first focus was natural mica.

Mica Sourcing Strategy

1. Prioritize domestic mica, sourced from Hartwell, GA, and vet suppliers through in-person audits.
2. Working towards 100% traceable supply chain, sourcing only mica which is vetted via intensive and in-person, third-party audits.
3. Partner with Kailash Satyarthi's Children's Foundation to support communities in the Indian state of Jharkhand.
4. Engage Sourcemap, a technology platform providing full visibility, mine by mine, day by day.

(45)



Mica was selected because of its ubiquity in consumer products, the complexity of the mica supply chain, and substantial concerns surrounding human and labor rights violations in mica mining and processing.

"Achieving a fully transparent and responsibly sourced mica supply chain is one of the hardest challenges we've taken on as a company, but we are in this for the long haul. People deserve to be protected, whether that be from the ingredients used in their everyday products, or safe working conditions in a mica mine."

Gregg Renfrew – Beautycounter Founder and CEO

Four takeaways drive change around sustainable beauty and responsible ingredient sourcing.

- 1 Sustainability is here to stay.**
Consumers drive the sustainability conversation, not influencers. This grassroots approach shows high engagement, retention, and growth.
- 2 Transparency begets trust.**
As more beauty brands share information about their ingredients and sourcing methods, this will become a norm across the industry.
- 3 Historically, ethics topics in beauty garner a lot of consumer attention.**
This often has led to major industry changes, from testing practices to labeling policies.
- 4 Companies have the power and responsibility to make positive changes.**
Opportunities abound for brands willing to engage their supply chains on a deeper level in order to reduce human rights violations, improve labor conditions, and minimize environmental impacts. Consumers reward responsibility with dollars and endorsements on social media.

APPENDIX



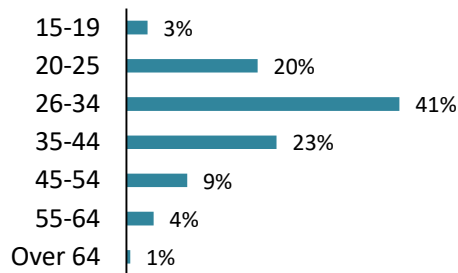
PREEN.ME RESEARCH OVERVIEW

Objective	Research Vehicle	Methodology
Understand perceptions among consumers and sustainability minded influencers surrounding natural, child labor-free mica as a raw material in cosmetics products.	Preen.Me Consumer Study	<ul style="list-style-type: none">• Online survey among 807 beauty enthusiasts and influencers who purchased at least one of the relevant beauty and cosmetics categories in the past 6 months• All are frequent makeup users (at least 2-3 times a week), aged 15+.• Sampling error $\pm 3.5\%$• Conducted February 2019
	Preen.Me Social Media Activity Study	<ul style="list-style-type: none">• Map all key social markers relevant to the conversation such as hashtags, tagged accounts and keywords.• Analyze all the public user generated content included in the relevant conversation.• Analysis Period: October 2018 - March 2019• Analysis Scope: 1.8M Instagram posts and 654 hashtags
	Preen.Me Influencer Focus Group	<ul style="list-style-type: none">• Used Preen.Me's proprietary database to identify eco-conscious / clean and non-toxic beauty / vegan / cruelty free influencers with a 10K+ following, well-versed in sustainable beauty with interests in clean beauty, nasty-free beauty, animal-free beauty, manufacturing transparency• Online Focus Group Discussion with 7 participants from US, Canada and UK

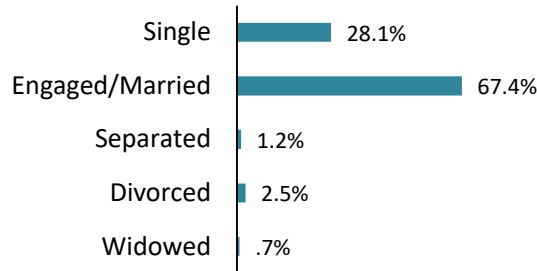
AUDIENCE SURVEYED

- The consumers surveyed are mostly made up of young women (20 - 44), living in the US.
- Two thirds live with a partner/married, about half have kids.

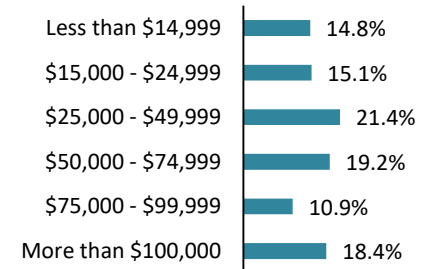
Age



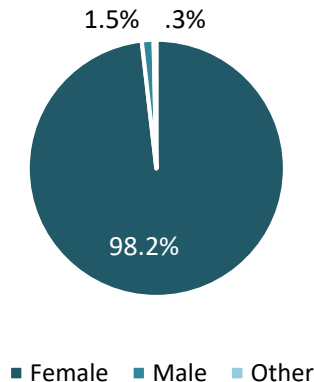
Marital Status



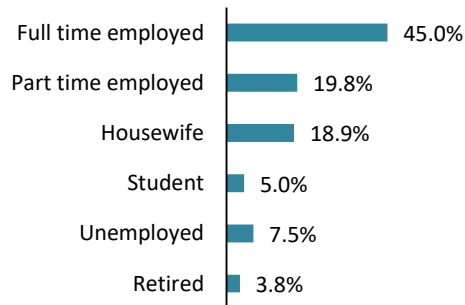
INCOME



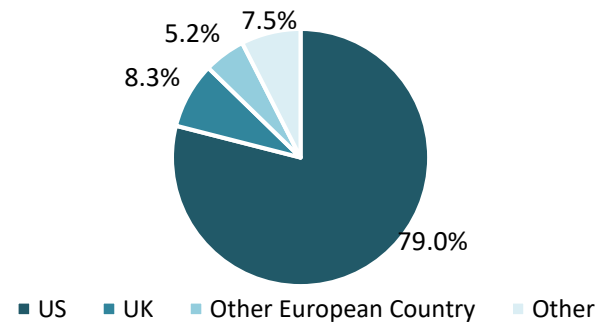
Gender



EMPLOYMENT



REGION



SOCIAL MEDIA ACTIVITY STUDY KEY TERMS

- **POSTS:** Each publication in Instagram, where a user uploads a picture and (usually) an accompanying comment. It is important to distinguish this from a regular *comment*, that is a written reaction to another user's *post*.
- **POSTERS:** The people posting.
- **SOCIAL INTERACTIONS:** An aggregate of comments and likes that represent the reactions of the users to a given post. This is the metric most influenced by marketing actions and/or influencers.
- **HASHTAGS:** Words with the “#” symbol before them, hashtags are strongly associated with Instagram and Twitter. They are “aggregators” for any given subject, utilized on the service’s search function. The more hashtags a post has, the more likely it will show up in searches about a related theme, and consequentially more likely to garner reactions.
- **HANDLE:** The account name, preceded by @, such as @Instagram.
- **FEED:** The first thing an user sees when they open Instagram. This is a digest of the posts from people the user follows, as well as suggestions from Instagram’s sorting algorithm.
- **FOLLOWERS:** Instagram users can follow a particular user that generates content of their interest. Once they do, the content generated by that user will have more preeminence on their feed.
- **INFLUENCERS:** Instagram users with substantial followings and therefore substantial influence with their followers.
- **SOCIAL CONVERSATION:** The total of the activities from the community around a given subject, hashtag or brand. It may have specific meanings depending on the metric (posts, posters etc).
- **UGC:** User Generated Content. Many brands promote UGC created by their followers from their users on their corporate accounts.
- **CONVERSATION GROWTH:** the percentage of new people entering the conversation is an indicator of growth around the category and acquisition of new customers.
- **POSTER RETENTION:** the percentage of posters that stays in the conversation, posting throughout the year.
- **INTENSITY OF POSTING:** how often users post is a function of how passionate they are about the category, and is indicative of whether the category has real evangelists.

Slide	Sources
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