



# VEGAN BEAUTY TAKEOVER 2021

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# INTRODUCTION

**In the vegan economy, no industry is moving faster than vegan beauty.**

Whether it is toothpaste or make-up, hair gel or deodorant, it is increasingly becoming easier to shop for vegan cosmetics and toiletries. Data from [Google Trends](#) shows that interest in vegan beauty has been growing steadily worldwide over the last decade, but it is the UK that is leading the way.

Between 2014 and 2019, there was a 175% increase in vegan cosmetic launches, [globally](#). In the UK, it is estimated that of all the new vegan items launched in 2020, over [80%](#) of them were within the beauty category. In 2019, research by [Cosmetify](#) found that 9% of British women always buy vegan beauty products and 47% do so more than they used to. Moreover, 39% of these consumers are not actually vegan!

The vegan economy is skyrocketing due to this increased attention in vegan cosmetics, with MarketGlass [predicting](#) that the global vegan cosmetic industry will be worth a staggering \$21.4 billion by the year 2027.

But despite booming sales figures, the industry still has a long way to go in terms of ethical credentials. Consumer confusion around cosmetic product labelling and ingredient- checking remain high concerns for the vegan community. In some cases, the industry may be using this to their advantage. Products derived from animals often hide behind unfamiliar names on packaging, and if consumers are unaware of this, why go through the long process of reformulation?

In the research described in this report, we found that the majority of consumers do want change, and many want animals completely removed from cosmetic and toiletry supply chains. But there are vast gaps in consumer knowledge, and only when these are narrowed do we see a switch in consumer habits and demands.

The Vegan Society wants to empower consumers to make informed choices about the products they choose to use for health, hygiene or beauty reasons. We also want to encourage the industry to be more transparent about where – or from whom – their ingredients are derived and to continue to embrace animal-free products and processes.







# HOW ARE ANIMALS USED IN COSMETICS AND TOILETRIES

The use of animals in the cosmetics industry has been high on the public's ethical agenda for decades, most notably for animal testing. There are many large-scale public awareness campaigns that have been running for years, and these have helped to change global legislation, reformulate products, develop different processes and save animals' lives. But it is not just the animals used for testing that consumers should be concerned about, as products derived from animals (such as sheep, insects, beavers and even whales) find their way into cosmetic and toiletry supply chains. In a way, these animals are even more invisible to the public, as unfamiliar terms can be misleading and labelling can be confusing as we will demonstrate later.

## Animal testing

In the UK, testing cosmetic products or their ingredients on animals is illegal. This ban was first implemented in 1998 for finished cosmetic products and "ingredients intended primarily for 'vanity' products". Prior to this, in 1993 the 6th Amendment to EU Directive 76/768/EEC was passed and contained a ban on the sale of animal-tested cosmetic products. To give adequate time to find non-animal methods, the deadline for the ban to come into effect was 1 January 1998. However, due to multiple delays this did not happen until 11 March 2013.

On 11 July 2013, EU Directive 76/768/EEC was replaced by EU Regulation 1223/2009 (Cosmetics Regulation) which contains all the same provisions.

Across the world, many more countries are in the process of phasing out animal testing, including Mexico, Russia, Canada, Japan and [South Africa](#).

In May 2021 it was [announced](#) that China would end the mandatory animal testing requirements for imported "general" cosmetics – such as shampoos, bodywash and make-up. Previously, China required animal testing of all cosmetics by law. But now, products that do not have claims such as "anti-ageing" or "anti-acne" will not need to go through mandatory animal testing when imported. China has also recently approved two non-animal methods of cosmetic testing – this is certainly a step in the right direction.

However, at the time of writing (August 2021), there are concerns that legislation in the UK could change for the worse, as [media reports](#) state that government ministers may be reconsidering this strict policy to align with recent development within the European Union. The Vegan Society will be monitoring the situation and we encourage all interested parties to do so too.

## Animal ingredients

In 2021, a YouGov survey commissioned by [Holland and Barrett](#) found that 53% of UK adults were not confident of identifying a skincare product that contained ingredients derived from animals, and on page 6 of this report we will delve deeper into this. This finding comes as no surprise, as there is currently no legal requirement for brands or manufacturers to declare products derived from animals on product packaging.

Unfamiliar terminology also leads to a confusing marketplace, particularly when ingredients are listed under their botanical or latin names like 'cera alba', also known as beeswax. Some of the most common animal-derived ingredients found in cosmetics are as follows:

**Ambergris** – A solid waxy substance originating in the intestine of the sperm whale. It is sometimes used as a fixative in the perfumery industry for high-end scents.

**Animal hair** – Commonly used in items whose listing is not mandatory, most often make-up brushes. This can be from any furry creature and regular examples are fox, squirrel, mink, goat, horse and sable.

**Castoreum** – Used in perfumery and is obtained by extraction of secretions from beavers.

**Cera Alba/Beeswax** – This is used as an agent to prevent liquids from separating. Used in lip balms, soaps and moisturisers, it can help the skin retain moisture.

**Cochineal dye/Carmine dye** – Also listed as natural red 4, E120 and C.I 75470. This can be found in a lot of lipsticks, blushes, nail polishes or anything else that mimics the classic rouge colour. It is created by crushing insects called cochineals.

**Collagen** – A protein that can be taken from the bones, skin, ligaments and tissues of cows. Plant-based, ethical alternatives include soya protein and almond oil.

**Estrogen** – This hormone may be added to anti-ageing creams to increase their effectiveness. It is obtained by extracting urine from pregnant horses. Vegan-friendly alternative are phytoestrogens – plant estrogens that can be derived from grapes, soybeans, flaxseed and different nuts and berries.

**Gelatine** – Used widely across the cosmetics and toiletries industry as well as the food industry. Gelatine is made from the skin, bones and connective tissue of farmed animals.

**Glycerin** – The most commonly used ingredient in cosmetics (after water) can be animal derived. It is used in some fragrances, hair products, oral care products and moisturisers amongst others.

**Guanine** – Used to give products a glittery or sparkly look, such as eyeshadows and highlighters. But this shimmering effect is achieved by scraping and crushing the scales of fish. There is synthetic guanine which can be suitable for vegans.

**Keratin** – A popular ingredient to aid the strengthening of hair and nails. This protein is often derived from the hair and horns of various animals, most commonly farmyard animals. Vegan alternatives include plant-derived proteins such as hydrolysed wheat, soya and corn.

**Lanolin** – Used in lip balms, lipsticks and glosses, this is derived from sheep's wool. There is also a plant-based version that has been given the same name.

**Propolis** – A hard resin found in beehives. The bees use this component to seal off holes in their honeycombs to protect it from intruders. Propolis can be found in sun protection products, acne products and lipsticks.

**Retinol** – Considered a skincare superstar, retinol is often animal derived, but some synthetic versions are suitable for vegans.

**Shellac** – You may be familiar with the name but may not be aware that shellac refers to a particular ingredient that could be lurking in your manicure. Lac bugs' shells are used to create that hard-wearing, shiny finish.

**Squalene** – An extract of a shark's liver. This is found in deodorants, lip balms and moisturisers. Squalene also shares its name with a plant-based product so it is advisable to research which one your chosen brand uses.

**Tallow** – You can find this ingredient in soap, foundation, nail polish and eye make-up. Also known as oleic acid, oleyl stearate, and oleyl oleate, it is made from the fat of farmyard animals.

*Ambergris  
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# LABELS WHAT DO THEY MEAN?

There is no legally binding definition of what makes a “vegan” or “cruelty-free” product when it comes to product labelling.

## THE VEGAN SOCIETY'S DEFINITION OF VEGANISM

*“Veganism is a philosophy and way of living which seeks to exclude – as far as is possible and practicable – all forms of exploitation of, and cruelty to, animals for food, clothing or any other purpose; and by extension, promotes the development and use of animal-free alternatives for the benefit of animals, humans and the environment. In dietary terms it denotes the practice of dispensing with all products derived wholly or partly from animals.”*

## THE VEGAN SOCIETY'S DEFINITION OF “ANIMAL”

*The Vegan Society understands the word ‘animal’ to refer to the entire animal kingdom. That is all vertebrates and all multicellular invertebrates. “Animal” can refer to a species or an individual; and is used as a noun or an adjective, as required. Unless otherwise stated, it usually means non-human animals.*

## Vegan

Products labelled as vegan are open to being mislabelled by companies – either because they misunderstand the definition or because they want to gain access to a vegan audience without doing the groundwork. In fact, it's why we introduced the [Vegan Trademark](#) – the world's first vegan product labelling scheme of its kind. The Vegan Trademark gives you the peace of mind that we have ensured those products are free of animal use – that's including ingredients, processes *and* testing. We will discuss this in more detail on page 12.

## Cruelty-free

In the beauty industry, the term cruelty-free refers to products which have not been tested on animals, or products that are not sold in territories where post-market animal testing is required by law. Cruelty-free does not, however, cover whether the ingredients in a product are derived from animals.

There are often misconceptions around what these two phrases mean among manufacturers, brands and consumers alike. We will discuss this in more detail on page 10.

“

“Unlike other sectors, beauty lacks agreed standards to meet in the areas that matter the most. This lack of shared framework for action is a significant hindrance to accelerating positive impact... Independently verifiable standards also remove the temptation for brands to self-certify. For example, 1% organic material is all that's needed for a company to claim a beauty product is organic. Standards limit the risk of unsubstantiated claims being made and ensures those brands achieving high standards gain appropriate recognition. Legislation has a role to play in cementing these efforts. **The result of widely adopted standards is that it lifts up all aspects of the ecosystem.”**

*The Courage to Change: Sustainability Report (British Beauty Council, 2020)*





# AUDIENCE

The Vegan Society's research partner [Attest](#) has access to millions of consumers worldwide.

For this panel, we sent out a survey asking respondents how often they purchased cosmetics and toiletries – such as make-up, bodycare, haircare, shampoo, skincare and toothpaste – and only included data from respondents who purchased them fairly regularly.

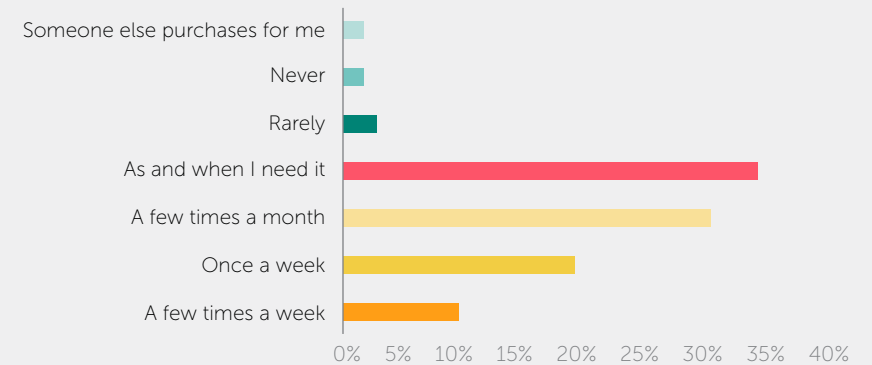
The final panel consisted of 1000 individuals with the following demographics:

**Age groups:** 17-24 (19.8%), 24-34 (20.2%), 35-44 (17.6%), 45-54 (12.3%), 55-64 (16.4%), 65+ (13.7%)

**Gender:** Female (62.9%), Male (37.1%)

**Home Region:** East Midlands (7%), East of England (9.2%), London (14.1%), North East (5%), North West (10.6%), Northern Ireland (1.5%), Scotland (7%), South East (13.8%), South West (7.4%), Wales (6.5%), West Midlands (10.1%), Yorkshire and Humber (7.8%).

## In general, how often do you purchase cosmetics and toiletries?





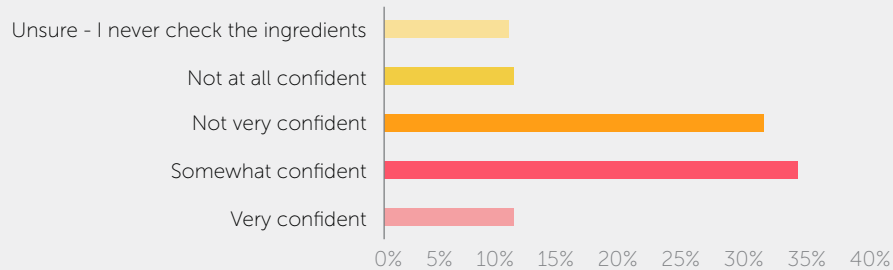
# HOW CONFIDENT ARE SHOPPERS AT IDENTIFYING ANIMAL-DERIVED INGREDIENTS?

We explained to the panel that cosmetics and toiletries often contain animal products for several reasons including colouring, binding or to create certain textures. We also stated that there is no legal requirement for brands or manufacturers to declare this on product packaging or in their ingredient lists.

Following this, we asked respondents how confident they felt about identifying animal-derived ingredients in their cosmetics and toiletries. 11.7% of the panel said they felt "very confident" and 33.9% said they felt "somewhat confident" – making 45.6% in total feeling positive about this. On the other hand, 31.5% said they felt "not very confident" and 11.6% said they felt "not at all confident" – making 43.1% in total. The results are in line with the March 2021 research from Holland and Barret, mentioned on page 3.

Worryingly, 11.2% of the panel said that they never checked the ingredients in their cosmetics or toiletries.

## How confident are you at identifying animal-derived ingredients within your cosmetics and toiletries?



Younger respondents were more likely to say they were confident at identifying animal-derived ingredients. For example, 60.4% of those aged 17-34 said they were either "somewhat" or "very" confident, compared to just 26% for those aged 50+.

Following this, we wanted to test these confidence claims with real examples.



**only 26%**  
of those aged 50+ said they were either "somewhat" or "very" confident about identifying animal-derived ingredients.

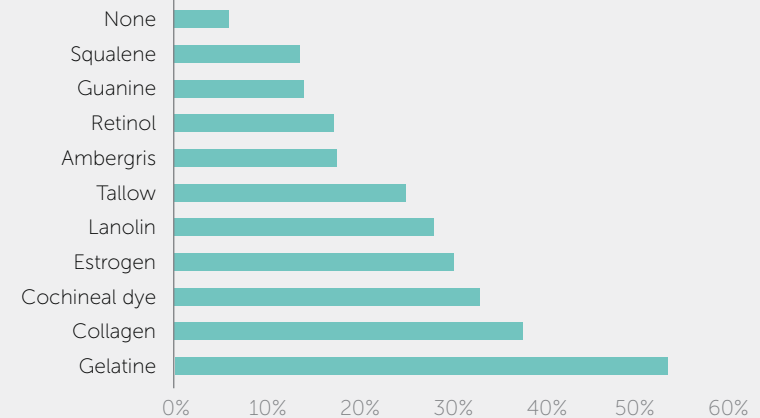




# TESTING CONSUMER KNOWLEDGE ON ANIMAL-DERIVED INGREDIENTS

As already mentioned, many ingredients used in cosmetics are often derived from animals. We selected 10 of these ingredients and asked the panel to select which of them they thought could be animal derived.

## Which of the following ingredients, commonly found in make-up and other cosmetics, could be animal-derived?



From the options given, only gelatine scored a majority percentage, with 53.6% correctly selecting that it is derived from an animal.

Worryingly, 5.7% of the panel selected that "None" of the ingredients were animal derived. However, most of these 57 people also previously said that they never check the ingredients for their cosmetics and toiletries.

Though some of these percentages may seem high, just 2.6% of our panel correctly selected all 10 ingredients, which is the only correct answer.

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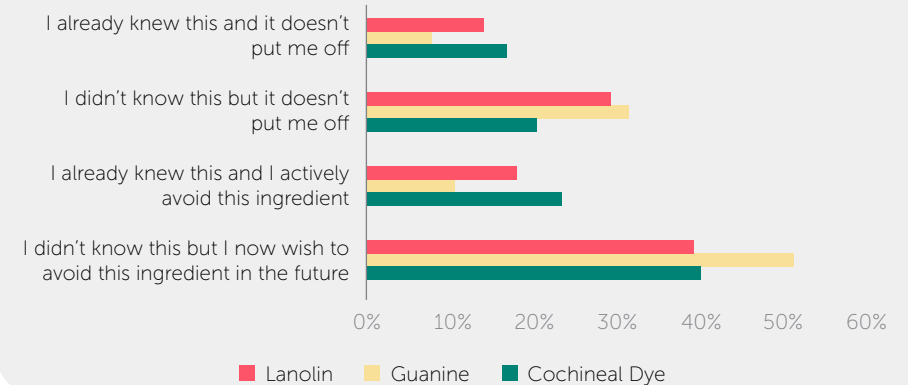




# INFORMING CONSUMERS ABOUT ANIMAL-DERIVED INGREDIENTS

We let the panel know that in fact, every one of the ingredients previously listed can be derived from animals. We chose three common ingredients – cochineal dye, guanine and lanolin – and gave information to the panel about where these ingredients come from. Following this, we asked the panelists their thoughts.

## After being told how these animal-derived ingredients are sourced, the panel members said...



**39.9%** didn't know cochineal dye was derived from crushing cochineal insects, but now that they do they wish to avoid it in future.

**COCHINEAL DYE is a red dye made from crushing insects. It is used widely across the cosmetics and food industry. Now you know this, would you still want to purchase cosmetics containing cochineal dye?**




### Cochineal dye

39.9% of the total panel said they didn't know cochineal dye was derived from crushing cochineal insects, but now that they do they wish to avoid it in future. Younger consumers felt more strongly about this, with 49.8% of those aged 16-25 (n=215) selecting this option. Furthermore, younger females felt the most strongly about this, with 55.8% of females aged 16-25 (n=163) selecting this option.


Encouragingly, 23.2% of the total panel said that they already knew how cochineal dye was sourced, and that they actively avoid it. Although the age bracket for millennials is not categorically defined, those aged 25-35 (n=22) were more likely to select this option (30%).

If you combine the two answers above, this means that once informed, most cosmetic and toiletry shoppers (63.1%) wish to avoid cochineal dye





**GUANINE** is a colourant which can be obtained from fish scales and is often used in shampoo and nail varnish. Now that you know this, would you still want to purchase cosmetics containing guanine?



**LANOLIN** is a wax secreted from the oil glands of sheep. It is used in many cosmetics. Now that you know this, would you still want to purchase cosmetics containing lanolin?

## Guanine


51.2% of the total panel said they didn't know that guanine is often sourced from fish scales, but they now wish to avoid it in future. Female respondents felt most strongly about this, with 59.2% (n=629) saying they will now avoid guanine.

10.3% of the total panel said that they already knew this, and that they already actively avoid guanine. Once again, if you combine the two answers above, this means that once informed, most cosmetic and toiletry shoppers (61.5%) wish to avoid guanine.

## Lanolin

39.2% of the total panel said they didn't know that lanolin is sourced from sheep, but they now wish to avoid it in the future. Younger respondents felt most strongly about this, with 49.8% of those aged 16-25 (n=215) selecting this option.

17.9% of the total panel said that they already knew this, and that they already actively avoid lanolin. Once again, if you combine these two answers, this means that once informed, most cosmetic and toiletry shoppers (57.1%) wish to avoid lanolin.



**51.2%** didn't know that guanine is often sourced from fish scales, but they now wish to avoid it in future.





**47.2%**  
*correctly said that when a cosmetic or toiletry product is labelled as cruelty-free, it means the product has not been tested on animals.*

# CONSUMER PERCEPTIONS OF VEGAN AND CRUELTY-FREE LABELLING

As previously discussed on page 7, the labelling of cosmetics and toiletries can be confusing for shoppers, as brands can make claims such as “cruelty-free” or “vegan” without having to prove products meet industry-wide or legal standards.

We asked our panel to start thinking broadly about all cosmetics and toiletries, and then to consider two types of labelling – “vegan” and “cruelty-free”.

**If a brand uses the following word on their product, what do you think that term means?**



## Cruelty-free

47.2% of the panel correctly said that when a cosmetic or toiletry product is labelled as cruelty-free, it means the product has not been tested on animals. 21.3% of the panel said that they thought cruelty-free labelling went a step further and meant the product had not been tested on animals and contained no animal ingredients. 9.4% said they thought cruelty-free labelling meant no animal ingredients, and 9.4% also said they thought it meant the product contained all natural ingredients. Finally, 12.6% said they had not thought about it before.



## Vegan

27.7% of the panel correctly said that vegan labelling means the product contains no animal ingredients and is not tested on animals. But a larger percentage (38.6%) thought it just meant that the product contained no animal ingredients. A relatively high number – 16.5% – thought vegan labelling related to a product having all natural ingredients. Whilst many vegan cosmetic products do claim to be completely natural, this is not a necessity. Finally, 6% thought it related to animal testing and 11.1% said they had not thought about it before.

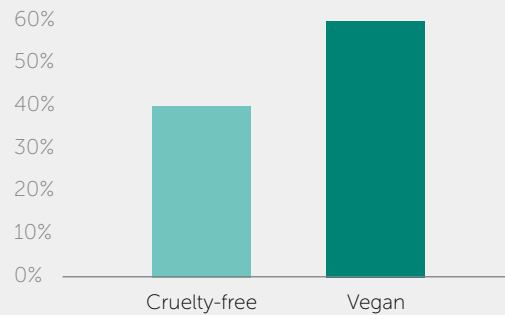
We then explained to the panel the difference between these two terms.

**CRUELTY-FREE** means a product has **NOT** been tested on animals but **CAN** contain animal-derived ingredients.

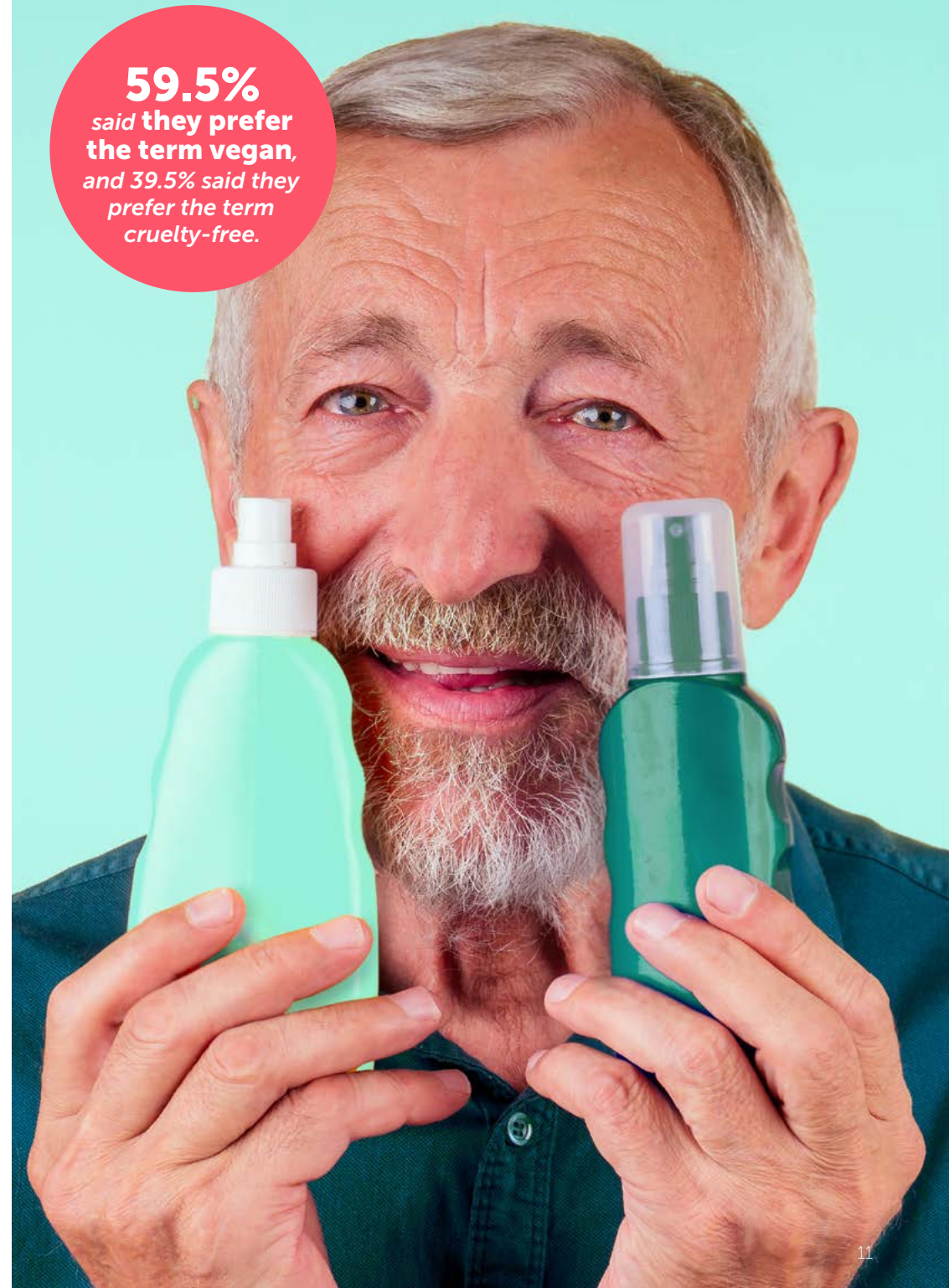
**VEGAN** products do **NOT** contain animal products and are **NOT** tested on animals.

We then asked the panel which of the two terms they found most appealing. Most respondents (59.5%) said they preferred the term vegan, and 39.5% said they prefer the term cruelty-free.

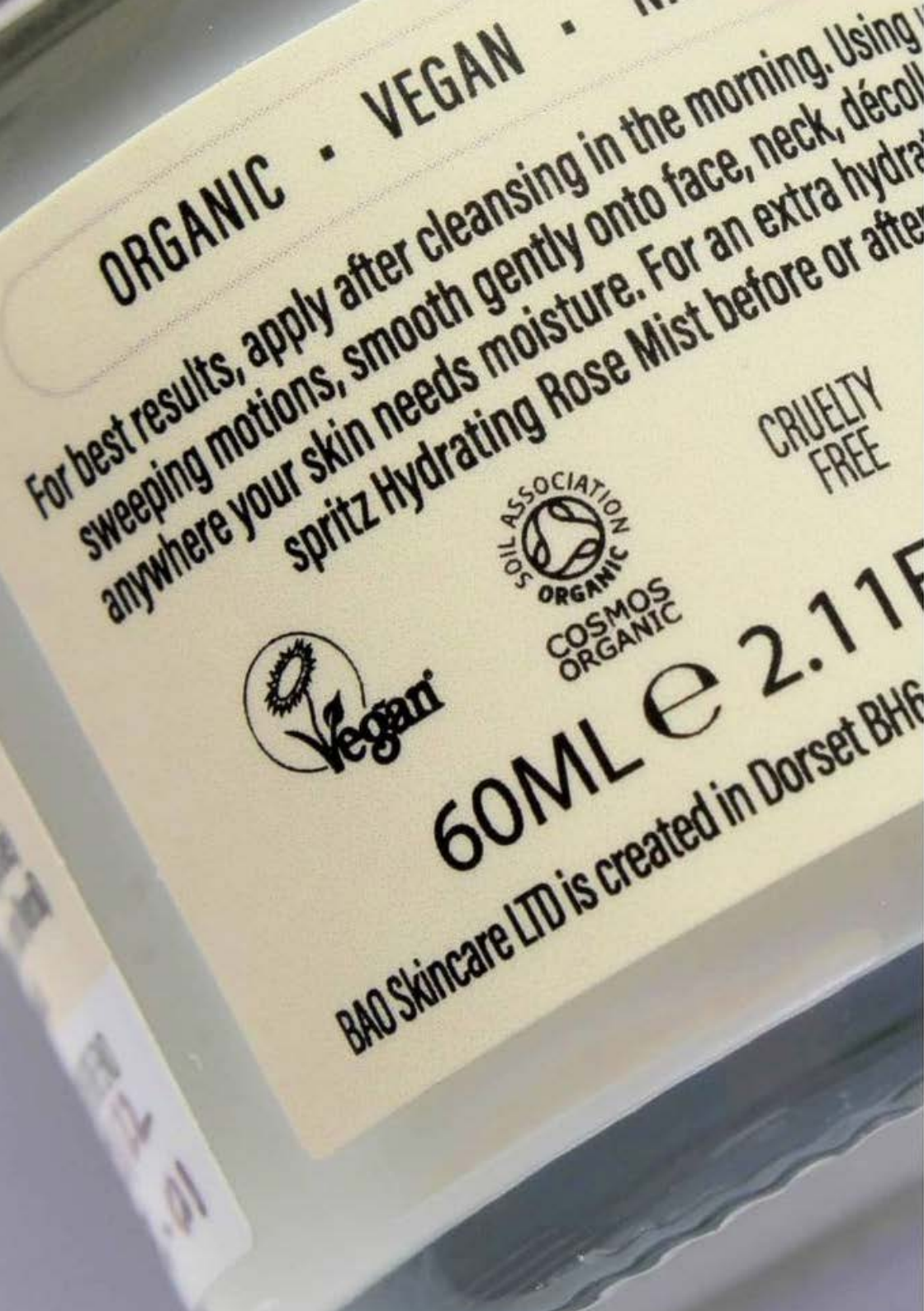
### What term is more appealing to you as a cosmetic and toiletry consumer?



**59.5%**  
said they prefer  
the term **vegan**,  
and 39.5% said they  
prefer the term  
**cruelty-free**.



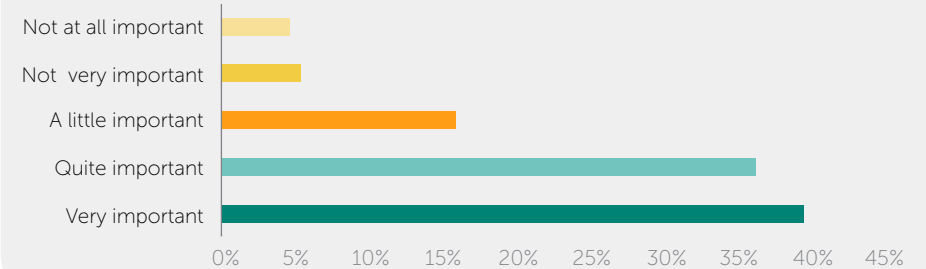




# VEGAN VERIFICATION AND THE VEGAN TRADEMARK

In this section of the survey we told the panel that in the cosmetics industry there is no legal definition of the term vegan. Hence, third-party verification schemes exist to ensure products meet verified vegan standards. In these schemes, audits ensure that the products' manufacture, development and ingredients are free from animal ingredients and animal testing.

## How important is it to you that brands selling vegan cosmetics and toiletries have vegan products certified by third-party organisations?



We asked the panel how important it was for them that brands selling vegan cosmetics and/or toiletries have their vegan products certified by a third-party organisation (i.e. that they are externally audited and consumers do not have to rely solely on the word of the brand/manufacture)?

Most of the panel said it was important: 39.3% said very important, 36% said quite important and 15.5% said a little important – a total of 90.8%. Just 5% said not very important and 4.2% said not at all important. There was little variance between gender and age groups.

## The Vegan Trademark

Thankfully, the [Vegan Trademark](#) is here to help, and since 1990 has been helping users identify that a product is free from animal ingredients.

Vegan cosmetics and toiletries make up a huge percentage of overall trademark registrations: at the time of writing (August 2021), the Vegan Trademark has 54,681 products registered, of which 23,506 are cosmetics and toiletries (43%).



## Historic achievements

1996 we registered our first cosmetic brand – **Friendly Soap**.

Next came **Dolma** perfumes in 1999 and **Original Source** in 2002

All three are still proudly registered with us today.

April 2002 we hit 1000 cosmetic products registered with the Vegan Trademark

**Mooncup** (the first menstrual cup to be made from silicone) was created in 2002

and registered with us in 2005

As of 2021, they have over 2 million users globally

December 2006 we hit 1000 cosmetic and toiletry registrations

we hit 10,000 cosmetic and toiletry registrations in April 2011

## Recent achievements

April 2021 The Vegan Society announced ongoing work with **Advanced Development and Safety Laboratories (ADSL)** to help remove animals from cosmetic testing. Though testing cosmetic ingredients and products on animals is currently illegal in the UK, many of the alternatives still use products that contain animal matter. ADSL have created a vegan-friendly system which allows cosmetic products to go through the same in-depth testing process as before – but with the total absence of products from animals. Also in June 2021, the **Body Shop** announced it would be the first global beauty brand to have its entire formulations portfolio registered with the Vegan Trademark by 2023.

August 2021 The Body Shop took their commitment to animals even further by partnering with UK lab MSL for **VeganSure® Tests** and became one of the first companies to start moving micro challenge tests to VeganSure solutions. Both ADSL and MSL's VeganSure have been registered with the Vegan Trademark, making the output of the tests an easy step for verification for cosmetics brands.

### DID YOU KNOW?...

We have a huge number of household names registered with the Vegan Trademark, including Faith in Nature, Tropic, ESPA, Primark Bodycare, Arbonne, GlossyBox, Imperial Leather, Tangle Teezer, The Konjac Sponge Company and hundreds more!

In addition to the kinds of products one would expect to be registered, other products benefitting from the Vegan Trademark include sanitary care, sexual wellbeing products (such as condoms and lubricants), make-up brushes, suncare, sheet masks, individual ingredients like oils and clays to make cosmetics at home, make-up remover pads (reusable and not), body brushes, nail files, toothbrushes and pastes, ear swabs, hair removal, fragrances, razor blades and beard oil. Plus, we even have shampoo registered for companion animals – so they don't miss out either!



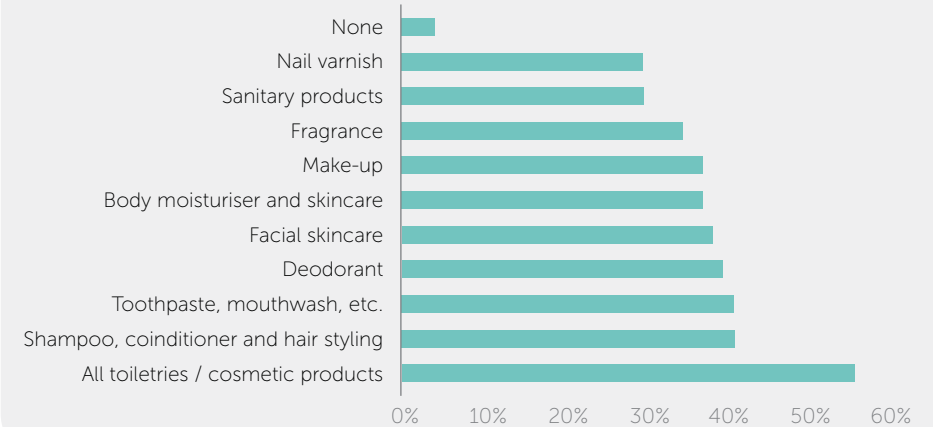


**55.5%**  
said they would like  
to see **more vegan-  
verified products**  
across all cosmetic  
and toiletry  
products.

## WHAT DOES THE CONSUMER WANT?

Our final question in the survey asked the panel to name the categories in which they would like to see more vegan-verified products.

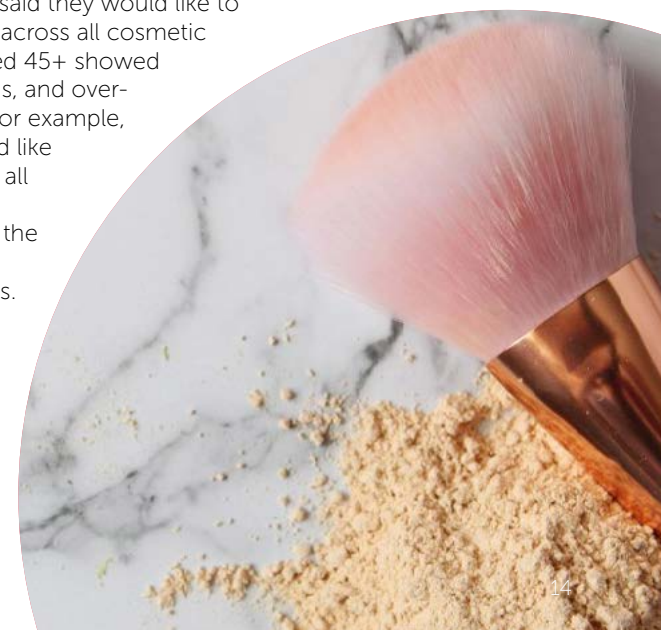
### In which of these categories would you like to see more vegan-verified products?



The majority of the panel 55.5% – said they would like to see more vegan-verified products across all cosmetic and toiletry products. Females aged 45+ showed a strong demand for vegan options, and over-indexed in every category given. For example, 71.4% of this group said they would like to see more vegan options across all cosmetic and toiletry products.

There was strong demand from the panel for more vegan choices in many individual product categories.

40.7% of the panel said they would like to see more vegan shampoo, conditioner and hair styling products. The Vegan Trademark works with many vegan haircare brands already, including those which are suited to curly hair.





A promising 40.4% were keen to see more vegan toothpaste and mouthwash. We currently work with a number of brands to supply these options, from zero-waste [Georganics](#) to global brands such as [Colgate](#).

Next came deodorant, with 39% of the panel saying they would like to see more vegan options. Vegan deodorants which are kind to the skin are rising in popularity, such as [Salt of the Earth](#) by Crystal Spring.

Facial skincare and body skincare (such as moisturiser) also scored highly, with 37.9% and 36.6% of the panel wanting to see more options, respectively.

36.5% of the panel said they wanted to see more vegan make-up, rising to 45.7% for females aged 17-25. This age group is leading the way when it comes to demanding more from the companies they purchase from – and the beauty industry should be reacting to their preferences.

Vegan fragrances came next, with 34.% of the panel saying they would like more vegan options.

Demand was strongest among women aged 50+, with 40.6% selecting this. In July 2020, [GHOST](#) fragrances registered a range of their iconic products with the Vegan Trademark.

29.3% of the panel said they would like to see more vegan sanitary products. Sanitary towels, for example, can contain glues and fragrances which may be animal derived. We work with a number of brands to ensure we have all options covered. [TOTM](#) provide vegan and organic sanitary towels, tampons and pantyliners; [WUKA](#) have a selection of period pants; and [Mooncup](#) and [RubyCup](#) both sell menstrual cups.

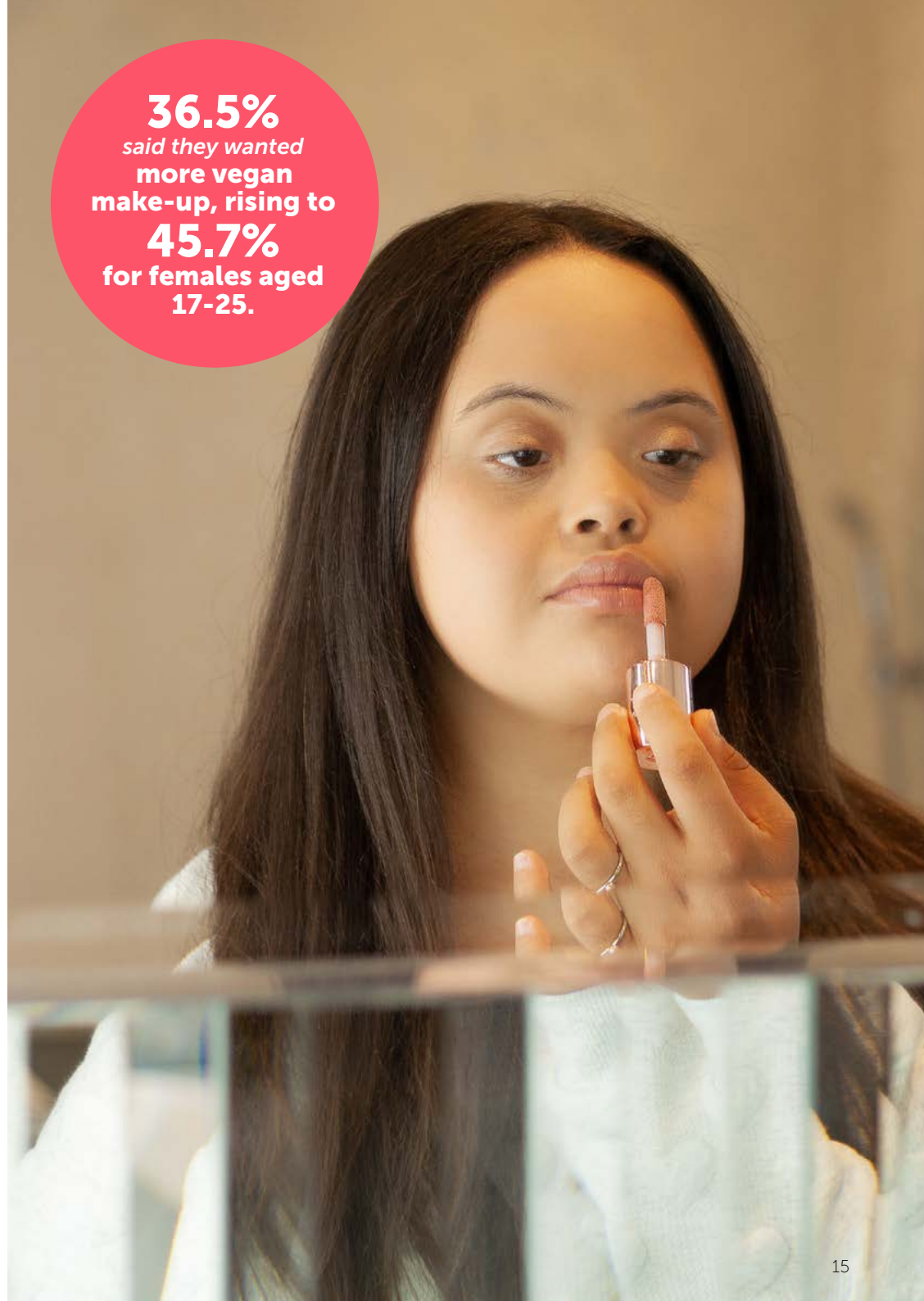
More vegan nail varnish was selected by 29% of the panel. Again, we work with a number of brands who sell these products.

There is a full write-up on this on our [website](#).

Finally, just 3.4% of the panel said they were not interested in any vegan cosmetic products.

**36.5%**  
said they wanted  
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for females aged  
17-25.

**40.4%**  
were keen to see  
more vegan  
toothpaste and  
mouthwash.



# CONCLUSION

We started this report by saying that in the vegan economy, no industry is moving faster than vegan beauty. We hope the information provided has gone above and beyond in backing up this claim.

If you are a brand interested in providing vegan-verified cosmetics or toiletries and want recognised and trusted credentials for your vegan claims, you can contact our Vegan Trademark Team on [TMSales@vegansociety.com](mailto:TMSales@vegansociety.com).

If you shop for cosmetics and toiletries and want more vegan-verified products, you can contact brands and let them know the Vegan Trademark is here to help. Showing demand increases the chances of making a kinder beauty industry a reality.

If you require more information about this report, would like more information about the data, or if you are interested in personalised research for your business or research collaborations, please contact [insights@vegansociety.com](mailto:insights@vegansociety.com).

