



VEGAN BEAUTY TAKEOVER 2023

(Revised April 2024)

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INTRODUCTION

The vegan beauty industry continues to grow

In 2021 we published our first report on the vegan beauty and cosmetics industry. The purpose of this report is to provide updated information on the current state of the vegan beauty and cosmetics industry and to present our most recent survey findings.

This year, in 2023, The Vegan Society celebrated having registered [30,000 vegan cosmetic products](#). Of the more than 65,000 products now registered with the Vegan Trademark, the cosmetics and toiletries category makes up 45% of all registrations. This milestone reflects the exceptional growth of the vegan beauty and cosmetics industry. Whether it be make-up, shampoo or skincare, it has never been easier for shoppers to find vegan beauty products.

Since our 2021 Vegan Beauty Takeover report, more brands have broken into the vegan beauty market, including fashion retailer H&M with its recently launched [OHH!](#) vegan beauty range, Kim Kardashian with her [SKKN](#) beauty products and Stella McCartney's skincare range [STELLA](#).

The vegan beauty economy is predicted to continue to grow. According to research from [Fortune Business Insights](#), the global vegan cosmetics market is projected to reach \$24.79 billion in 2028. According to [Grand View Research](#), the Asia-Pacific region is expected to be the fastest growing market for vegan cosmetic products, at a predicted compound annual growth rate of 7.4% from 2022 to 2030.

The increased offering of vegan cosmetic and beauty products is to be celebrated. However, in 2021 we said that the industry still has a long way to go in terms of ethical credentials – and this is still true two years later. Consumer confusion around cosmetic product labelling and ingredient checking remain high concerns for the vegan community. In some cases, the broader cosmetics industry may be using consumer confusion or general lack of ingredient clarity to their advantage. Products derived from animals often hide behind unfamiliar names on packaging, making it difficult to recognise animal-derived ingredients.

In our 2021 report, we explored consumer interests relating to animal-derived ingredients in detail. We found that the majority of consumers do want change, and many want animals completely removed from cosmetic and toiletry supply chains. In this 2023 report, we narrow our focus to explore consumer demand for vegan cosmetic products and consumer knowledge of key labels.

This year we ran a survey asking a smaller selection of key questions from our 2021 survey. Respondents were asked questions designed to test consumer understanding of the 'cruelty-free' and 'vegan' product labels. We found that little has changed since 2021 and that consumers continue to display widespread confusion. The results will be explored in full later in this report.

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 – its ingredients are derived and to continue to embrace animal-free products and processes.



HOW ARE ANIMALS USED IN COSMETICS AND TOILETRIES

Animal testing for cosmetics is a cruel and unnecessary practice. Animal testing has been a source of outrage and protest in the UK and around the world for decades. Public awareness campaigns from charities, individuals and cruelty-free brands, have helped change legislation on a global scale and have resulted in some positive changes in the cosmetics industry.

However, animal testing is only one part of the issue here. Using ingredients derived from animals is still a common practice in the beauty industry. Ingredients from animals, including sheep, insects, beavers and whales are all widely used in cosmetics. These animal-derived ingredients are made largely invisible through the use of industry terms that the average person is unfamiliar with. Ambergris, cochineal dye, lanolin, shellac – these are just a few examples of animal-derived ingredients that may go unnoticed as animal products on a beauty product ingredients list.

Animal testing

2023 has seen renewed interest in the problem of animal testing. The UK government's decision to allow the use of animal testing for cosmetic ingredients was challenged by [Cruelty-free International](#) in the High Court. Unfortunately, the Court sided with the UK government's interpretation of inherited EU legislation requiring animal testing for certain chemicals. The Court ruled that the EU legislation was not in conflict with the UK's ban on animal testing for cosmetics and that it can reinstate the ban on animal testing.

The ruling was a blow to the two-decades long ban on animal testing for cosmetics in the UK. After a short period of uproar, the government announced a [partial reinstatement of the ban](#). However, chemicals used in cosmetics ingredients are still being tested on animals. We urge for a full reinstatement of the ban.

Ingredients from animals, including sheep, insects, beavers and whales are all widely used in cosmetics.



Animal ingredients

Unfamiliar terminology leads to a confusing marketplace, particularly when ingredients are listed under their botanical or Latin names such as 'Cera Alba', also known as beeswax. The result is that consumers lack the confidence to recognise animal-derived ingredients whilst shopping for beauty products. This is explored more thoroughly on page 6.

A full list of some of the most common animal-derived ingredients first featured in our [2021 report](#). That list is reproduced here::

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/Carmines 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.

Oestrogen – This hormone may be added to anti-ageing creams to increase their effectiveness. It is obtained by extracting urine from pregnant horses. Vegan-friendly alternatives are phytoestrogens – plant oestrogens 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.

Glycerine – 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 farmed 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.

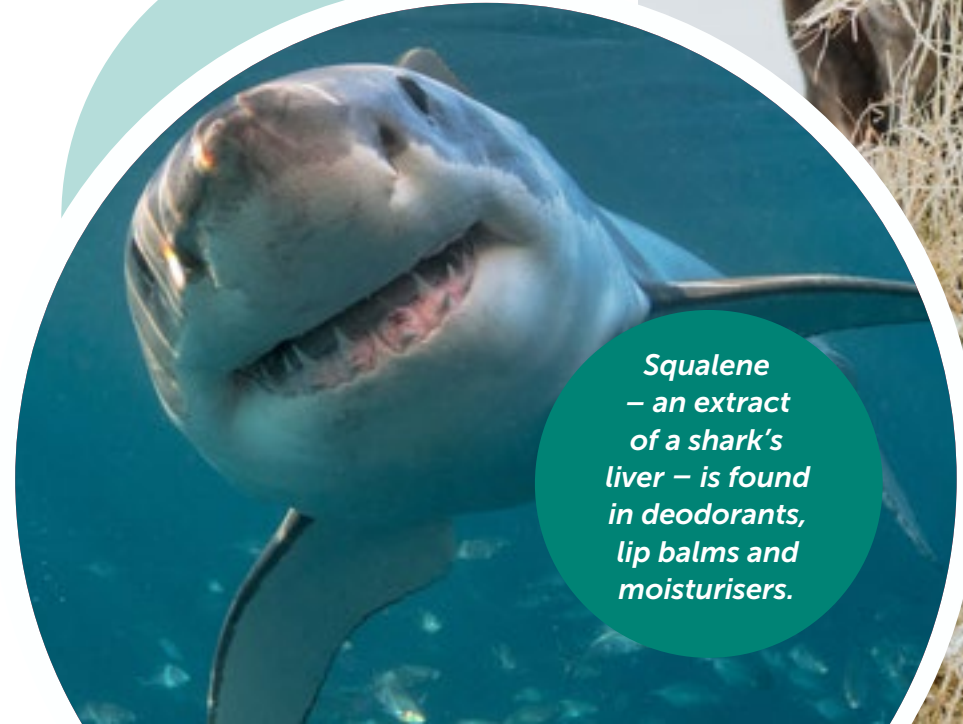
Squalene – An extract of a shark's liver. This is found in deodorants, lip balms and moisturisers. Squalene also shares its name with a plant-based product so it is advisable to research which one your chosen brand uses.

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 farmed animals.

Collagen is a protein that can be taken from the bones, skin, ligaments and tissues of cows.



Squalene – an extract of a shark's liver – is found in deodorants, lip balms and moisturisers.



Credit: Jo-Anne McArthur / We Animals Media

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-based ingredients, and have not been tested on animals by the company or on its behalf

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.





AUDIENCE

In July 2023, using our consumer research partner, Attest, we ran an anonymous survey to a nationally representative audience of 1000 people. The survey consisted of four questions, repeated from our 2021 survey on the same topic. In our survey, respondents were asked how often they purchased cosmetics and toiletries – such as make-up, bodycare, haircare, shampoo, skincare and toothpaste. Those who purchased at least fairly regularly were qualified into the survey. The demographic data is as follows:

Age groups: 18-24 (15%), 25-34 (20%), 35-44 (24%), 45-54 (22%), 55-64 (19%)

Gender: Female (51%), Male (49%)

Home Region: East Midlands (8%), East of England (9%), London (13%), North East (5%), North West (12%), Scotland (8%), South East (13%), South West (9%), Wales (5%), West Midlands (9%), Yorkshire and Humber (9%).

In general, how often do you purchase cosmetics and toiletries? E.g., make-up, body care, haircare including shampoo, skincare, toothpaste

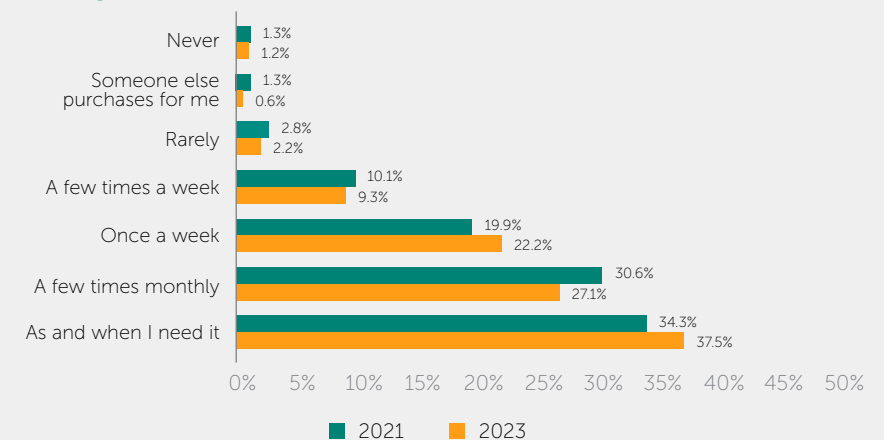


Figure 1: Single choice question. 2023 audience was 1041 people in the UK. 2021 audience was 1054 people in the UK.

HOW CONFIDENT ARE SHOPPERS AT IDENTIFYING ANIMAL-DERIVED INGREDIENTS?

The second question in our survey asked respondents how confident they were at identifying animal-derived ingredients in cosmetics and toiletries.

A total of 47.2% of respondents were "Somewhat confident" (35.6%) or "Very confident" (11.6%). By contrast, a total of 43.1% of respondents were either "Not very confident" (32.6%) or "Not at all confident" (10.5%).

9.7% of respondents said they never check the ingredients of the cosmetics and toiletries that they buy.

By analysing the responses by age, we found that those aged 55-64 were significantly less likely to respond "Somewhat confident" to this question at 26.6%, and significantly more likely to answer with "Unsure – I never check the ingredients" at 17.4%.

We found no statistically significant difference between how male and female respondents answered this question.

As you can see in figure 2, the results are largely unchanged since 2021. This data therefore tells us that there remains a fairly even split between UK consumers who are and are not confident in their ability to recognise animal ingredients in cosmetics and toiletries.

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

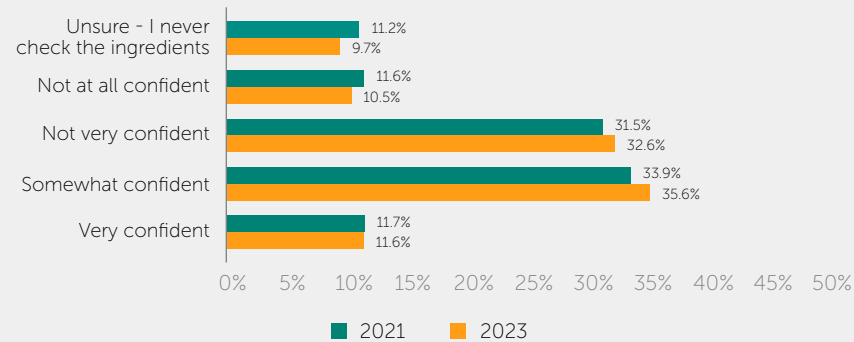
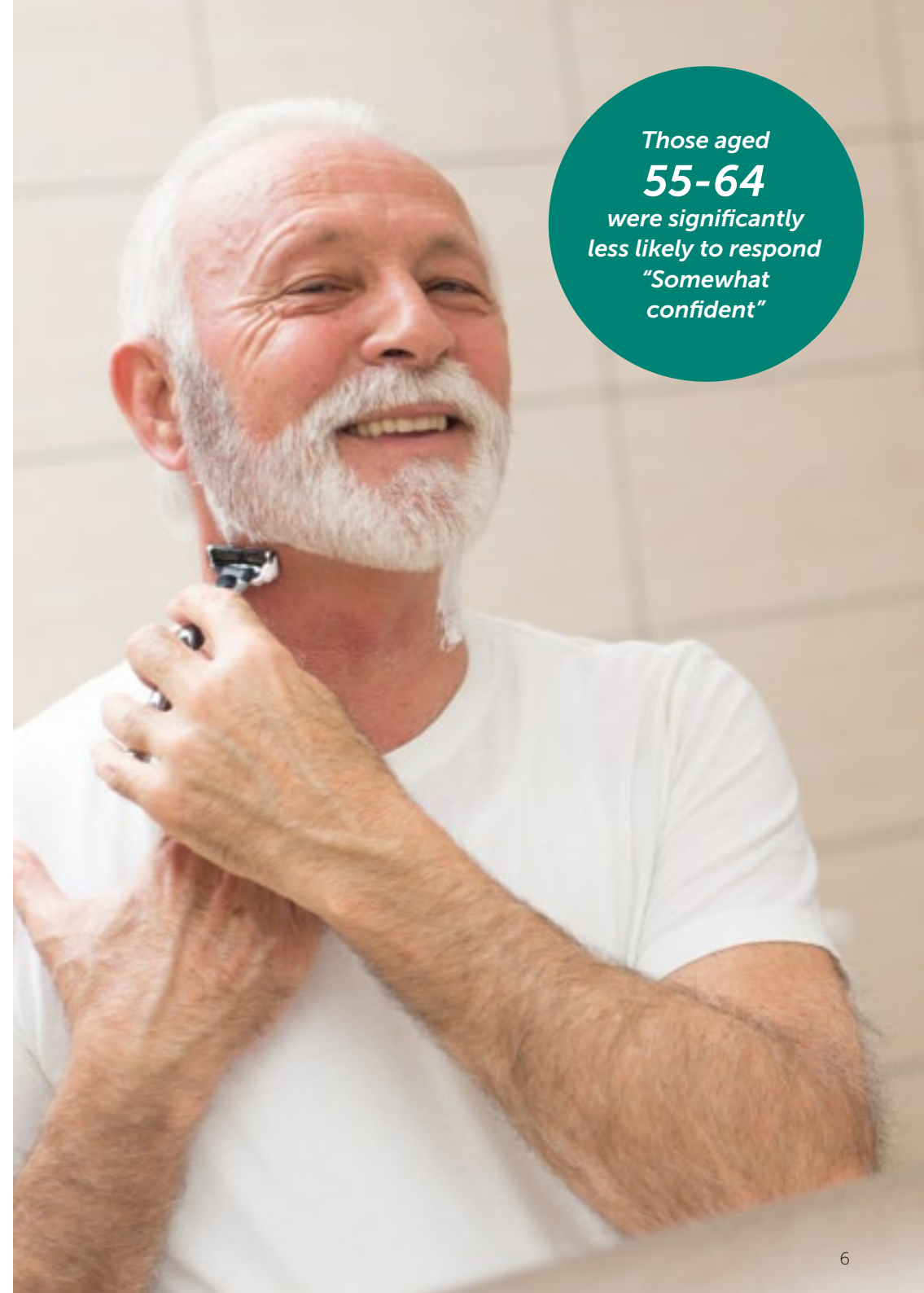


Figure 2: Single choice question. 2023 audience was 1000 people. 2021 audience was 999 people.



Those aged **55-64** were significantly less likely to respond "Somewhat confident"



VEGAN TRADEMARK STANDARDS

Animal ingredients: *The manufacture and/or development of the product, and its ingredients, must not involve or have involved, the use of any animal product, by-product or derivative.*

Animal testing: *The development and/or manufacture of the product, and its ingredients, must not involve or have involved, testing of any sort on animals conducted at the initiative of the company or on its behalf, or by parties over whom the company has effective control.*

CONSUMER PERCEPTIONS OF VEGAN AND CRUELTY-FREE LABELLING

Labelling can be confusing for consumers. Vegan and cruelty-free claims can be found widely on beauty and cosmetic products – but do consumers actually understand what these labels mean?

Our data from 2021, and confirmed once again in 2023, suggests the answer to that question is, no. Despite the fact that both the vegan and cruelty-free labels have been around for quite some time now, most UK consumers do not fully understand what either means.

Respondents were asked what they believed the words vegan and cruelty-free meant if seen on cosmetics or toiletries.

Cruelty-free

Our results showed that almost half (48.7%) of the panel correctly selected that 'cruelty-free' means a product that has not been tested on animals. Over half the panel selected incorrect answers to this question.

29.8% of the panel incorrectly believed that 'cruelty-free' means a product that has not been tested on animals AND does not contain any animal products.

7.6% of the panel believed that 'cruelty-free' refers to products which contain no animal products and 6.4% believed it meant the product contains all natural ingredients.

A further 7.5% of respondents were unsure – they had never thought about it before.

Vegan

Only 29.9% of those surveyed selected the correct answer for the 'vegan' label, which is a product that contains no animal products AND has not been tested on animals.

The 'vegan' label is most commonly associated with a product that contains no animal products, with 40.9% of respondents choosing this answer.

18.6% of respondents thought that a vegan product contains all natural ingredients. 4.4% of respondents thought a vegan product was something that had not been tested on animals.

A further 6.2% of respondents were unsure – they had never thought about it before.



2023: If a brand uses the following word on their product, what do you think that term means?

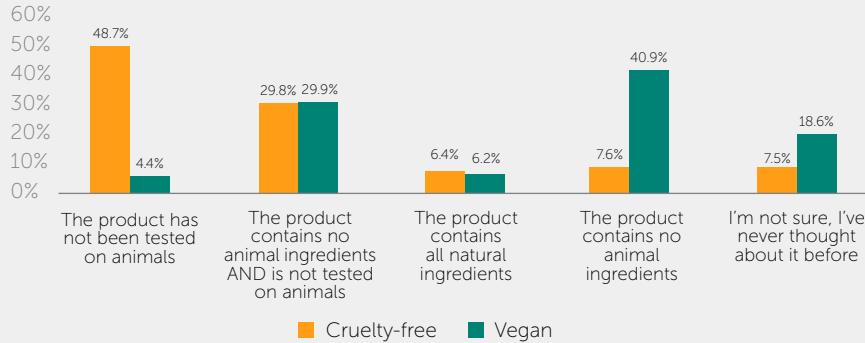


Figure 3: Grid question, single choice. Audience was 998 people in the UK who purchase cosmetics and toiletries.

2021: If a brand uses the following word on their product, what do you think that term means?

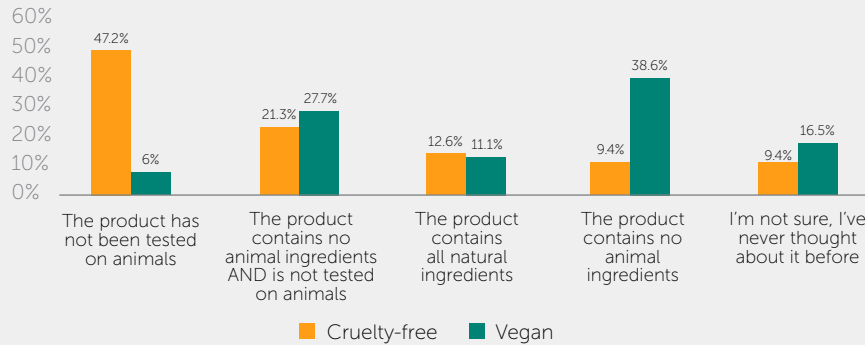


Figure 4: Grid question, single choice. Audience was 998 people in the UK who purchase cosmetics and toiletries.

Consumer confusion

Perhaps the most interesting find from this is that the labels 'Cruelty-free' and 'Vegan' are equally associated with products that contain no animal products AND have not been tested on animals. By comparing the data from 2021 to 2023, it seems that since 2021, more people are (incorrectly) associating 'Cruelty-free' with products that don't contain animal products AND have not been tested on animals. Why more people are associating 'Cruelty-free' with this is unclear, but perhaps this indicates an expectation from consumers that cruelty-free products should not include animal-derived ingredients. This needs to be investigated further.

The findings from this question show that 'Cruelty-free' is a far better understood label than 'Vegan'. However, more than half of the respondents chose the wrong definition for 'Cruelty-free'. Worryingly large numbers of consumers do not fully understand what either of these terms mean.



WHAT DOES THE CONSUMER WANT?

The final question of our survey asked consumers in which product categories they would like to see more vegan registered products.

The most common response selected was all toiletries/cosmetic products with 42.9% of respondents selecting this option. This is a drop from 55.5% in 2021. However, there was no 'None' option in the 2021 survey, which explains the drop in all answer categories and the 16.8% of respondents who said 'None' in 2023.

35.3% of respondents said they would like to see more vegan registered shampoo, conditioner and hair styling products.

35.1% said they would like to see more vegan registered toothpaste, mouthwash, etc. This was the most commonly chosen category for those aged 18-24, with 31.3% selecting this option. The Vegan Society has certified [The Humble Co.](#) products, which offers a range of vegan toothpastes and dental floss.

32% of respondents selected body moisturiser and skincare. This year [STELLA](#) renewed its range of skincare formulas with The Vegan Society Trademark, having launched in 2022.

31.1% said they would like to see more vegan registered deodorants. [Salt of the Earth](#) offers a variety of vegan certified deodorants.

30.9% would like to see more vegan registered make-up products.

30.1% of respondents said they would like to see more vegan registered facial skincare products.

25.2% would like to see more vegan registered fragrances. Those aged 25-34 were significantly more likely to select 'Fragrance' at 32.3%.

21.9% of respondents would like more vegan registered sanitary products. Those aged 55-64 were significantly less likely to select 'Sanitary products' at 14.6% and significantly more likely to select 'None' at 25.4%. A range of vegan certified menstrual products, including period pants and swimwear are available at [WUKA](#).

18.5% of respondents, receiving the fewest selections from the panel, was nail varnish.

A further 16.8% of respondents selected "None" when asked the question.

Female respondents were significantly more likely than male respondents to select the following categories: nail varnish, sanitary products, fragrance, make-up, body moisturiser and skincare, facial skincare, shampoo, conditioner and hair styling and all toiletries/cosmetic products. Male respondents were significantly more likely to select 'None'.

The most common response from female respondents was 'All toiletries/cosmetic products' at 47.9%. This was also the most common response from male respondents at 37.6%.

What does the consumer want?

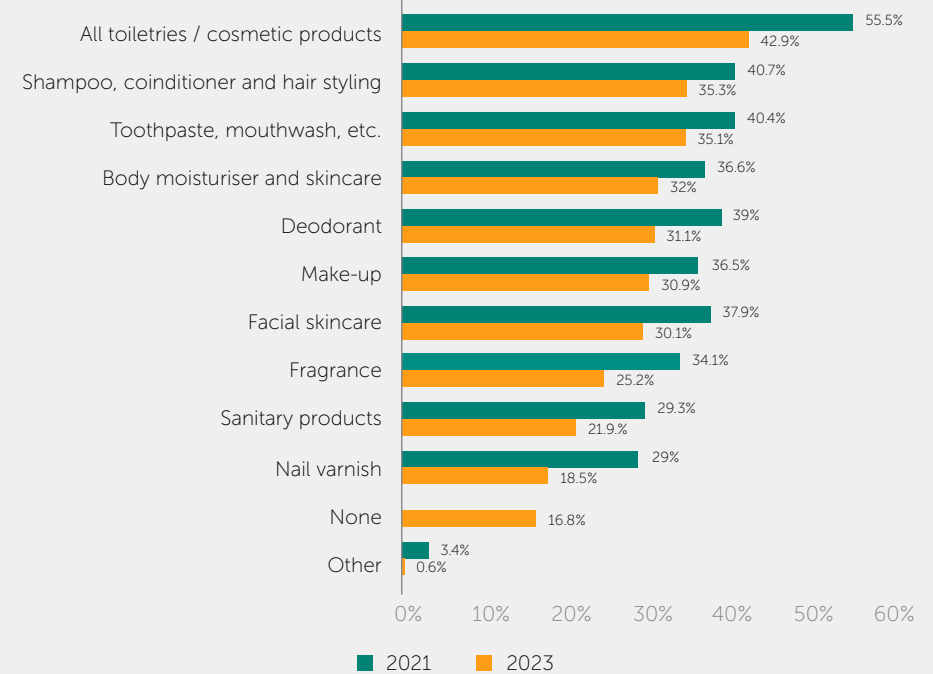


Figure 5: Multiple choice. 2023 audience was 982 people. 2021 audience was 975 people.



CONCLUSION

The vegan beauty industry is huge, and it continues to grow with new brands emerging onto the scene each year.

In 2021 we published our first report into the rise of vegan beauty and cosmetic products and have since published a similar report on the [US vegan beauty market](#). In this 2023 report, we have been able to rerun a selection of survey questions to a UK audience thereby providing fresh data on consumer understanding of cruelty-free and vegan labels and interest in vegan product categories.

In the research presented throughout, it is clear that UK consumer confidence is mixed. We have shown that there is a fairly even divide between those who are and are not confident in their ability to identify animal-derived ingredients in beauty products. We have also shown that there remains a lot of work to do in terms of education and understanding of labels. Cruelty-free is a far more understood label than vegan, but worryingly large proportions of consumers do not fully understand what either of these terms mean.

However, brands have an opportunity to help shoppers to make more informed choices: We believe it's important for companies who still use animal products in their ingredients to be more transparent about their use – and use ingredients that are free from animals altogether. Shoppers should know exactly what they are purchasing, which is currently being hindered by confusing labels and ingredient names.

We also encourage brands that do have vegan credentials to be more vocal about it. Our data indicates that most shoppers don't fully understand the vegan label, so we urge you to use your products, websites and social media to tell your customers exactly what it means to be a vegan-certified brand.

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. 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 or would like more information about the data, please contact research@vegansociety.com.

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