



Turning inside out

The skin care market is moving at an astonishing speed. But where will it be heading next? asks SPC

Skin care is putting on a more radiant face than ever before. The global skin care market was valued at US\$38.5 in 2003, up by 6.8% on 2002, and it's easy to see why the sector - the second largest in C&T globally - is

performing so well. As more discoveries are made about skin and its functions, and of resilient new ingredients, manufacturers are producing specialist products that work with the new findings to produce effective solutions.

It is no coincidence that demand for faster and stronger anti-ageing effects

**Even
cleansers
are offering
increasingly
specialist
solutions**

Estée Lauder

is rising while the cosmeceutical industry is now achieving double digit growth - almost double that of the general cosmetics industry. Even growth in the UK, a country which typically favours more traditional skin care, has doubled in the past year. And non-surgical cosmetic procedures, such as micro-dermabrasion, chemical peels and laser resurfacing are, particularly in the US, becoming increasingly normal additions to beauty routines. Botox continued to rank first among all cosmetic procedures last year in the US, where doctors performed almost 1.7 million procedures, increasing 37% from 2002. Marvin Wilkinson of The Future Laboratory, speaking at the In-Cosmetics exhibition in April, commented on the most extreme development this year. "The Royal College of Surgeons in England say a face transplant is imminent. Ten patients are waiting for a John Woo Face/Off style face transplant. For 50% of these people it is for cosmetic purposes only."

The counter trend however, noted by Mintel, is for consumers to avoid the plastic surgeon and instead look for alternatives. This is a happy trend for cosmeceutical companies, whose topical, often anti-ageing products, "contain high levels of active ingredients - not label claims like so many cosmetic products - and promise real results," says Sonia Amoroso, md of Australian company SkinDoctors Dermaceuticals. "I often like to refer to them as bridging the gap between conventional skin care and more invasive

cosmetic procedures," she adds.

Botox-effect products have been particularly successful, and an increasing amount of "facial relaxers" are currently being launched. Relaxaderm, for example, has become SkinDoctors' hero product, it says, being the fastest selling skin care product in Australia. After its launch, the entire country's supply of the product sold out in just a few days. Relaxaderm, which claims to reduce the visible appearance of

wrinkles by up to 50% in 30 days, contains argireline, a peptide derived from amino acids which acts as a muscle-relaxant by reducing catcholamine, the neuro-transmitter responsible for muscle contraction. "When the muscle relaxes, facial expression and microcreasing is reduced and the corresponding wrinkle is also reduced," says Amoroso. Serum XL from US company Bioque also uses argireline and is a best seller, attracting celebrity endorsement. It was introduced to the UK in October. Mass market brands have also been quick to market products that claim to be cosmetic alternatives to surgery, offering immediate and long term benefits. Wrinkle De-Crease Serum from L'Oréal Paris combines concentrated boswellic acid with manganese gluconate to inhibit fibroblastic contraction. The Serum also contains mimosa rose as its fragrance, which studies by L'Oréal Paris found to relax the trapezium muscle.

Despite this, there is a marked distinction between cosmeceuticals and prestige/mass market product categories, and that is the amount of actives used in the products. Unsurprisingly perhaps, there are two very different schools of thought on this in the industry. Lesley Reynolds, md of JMSR, European distributor of the Jan Marini cosmeceutical line comments: "Major cosmetic companies are already beginning to include ingredients such as retinol, AHAs, beta hydroxy acids, vitamins E, C and even K, but at strengths that are virtually ineffective." Amoroso adds: "In the long term, what will separate the two categories is the efficacy of the product... a true cosmeceutical will make a true difference in the skin." However, Daniel Maes, global R&D director at Estée Lauder says: "We believe and have strong evidence that it is not wise to use a strong concentration of actives, such as retinol, because it creates a skin reaction, ie inflammation, which at the end of the road is going to produce premature ageing. Using high concentrations of say one molecule is complete nonsense. We use a combination of different molecules for specific effects. This might be complicated for the formulator who has to use 70 to 80 different ingredients, but this is what you have to do to create good results."

Estée Lauder is also applying its belief in using lower concentrations of ingredients to create alternatives to intrusive treatments such as microdermabrasion. Idealist Micro-D Deep Thermal Refinisher, launched last September, combines a little heat via its patented calcium chloride technology, with a low concentration of some of the particles used in a dermabrasion

treatment (microcrystalline spheres, bamboo and precious micronized jade) to resurface the skin. The heat "helps particles to loosen skin cells and improve the appearance of the skin," says Maes. "Business is brisk in this area. We thought it would be segmented but women want faster and stronger effects."

Anti-wrinkle

Technology has been pushing back the boundaries in the field of anti-ageing moisturisers. Future Perfect Anti-Wrinkle Radiance Crème SPF15 from Estée Lauder, on-counter in September, uses Cell Vector technology. This tackles DNA damage caused by the excessive release of hydrogen peroxide produced in older skin by offering a specific delivery of antioxidants into cells. It also targets moisture and radiance-deficient areas of the skin. Ingredients in the formula include vitamin C, muru muru butter and coffee seed extract.

Primordiale Optimum from Lancôme tackles the first signs of ageing with three new technologies. Duplex Vector is a new generation of vectors that claim to improve the quality of the surface and deeper epidermis. A peptide extract from the seed of bambara nut acts to promote filaggrin in the upper layers of the epidermis for suppleness, and extract of green sea plant is added to the second vector to promote the growth of keratinocytes deep down in the epidermis. A thermo-adaptive polymer, which is said to cushion variations in temperature and preserve evenness of the complexion, is combined with nanocapsules of vitamin E for anti-free radical protection and SPF15 for defence against UVA and UVB filters. The third technology is its patented skin fibre system which gives the skin an immediate smoothness.

Kanebo will specifically target the skin's surface with Advanced Recovery Concentrate (ARC) Cell-Refining Cream, which is launching in August. It provides extra energy to fuel the specific cellular processes that are vital in forming a strong, uniform membrane surface. Kanebo claims that this leads to a smoother, more even and radiant skin surface. It contains Bio Cell Activator to encourage energy metabolism in the deeper layers of the skin and Cell Refiner, from avocado, to boost the function of keratin and enhance the energy metabolism in the upper epidermis.

Estée Lauder uses combinations of different molecules for specific effects

In the mass market, Nivea's new Visage Beauty Boost, two day and night creams, also promise brighter and more radiant skin, plus significant reduction in the appearance of wrinkles after eight weeks. The products are formulated with Creatine which enhances energy production and storage in the skin cells and aids collagen synthesis. Both creams contain vitamins C, E, panthenol and tapioca starch, while the night cream includes vitamin A and the day cream offers UVA protection.

There have also been a number of developments in products which specialise in repairing, restoring and lifting the delicate eye area. Caudalie's Eye Lifting Serum incorporates resveratrol, a molecule produced by the vine as a defence mechanism. Its regeneration properties increase the number of cells by 24% and provide protection against free radicals. Fresh chose to work with iris root, cucumber and camomile wax for their plumping and firming properties for Repair & Restore Eye Balm, while green tea and grapeseed polyphenols are included to defend against free radicals. The latest cosmetic surgery development in this area is Isolagen, a treatment that uses the patient's own cells to repair the skin, which, once they have grown to their optimum condition, are then re-injected back into the patient's skin, reducing dark circles, fine lines and wrinkles around the eyes.

Pores for thought

Isolagen actually became known for treating acne scarring using this method when it was launched just over a year ago, and developments in acne and spot treatment have led to many new kinds of topical products, helping to unclog the sector. SkinDoctors' Blemish

Free 4-step programme comprises Exfoliating Cleanser, Skin Clearing Toner, Pore Minimising Cream and Overnight Zit Zapper, combining glycolic, malic and citric acid to promote the shedding of dead cells, with soothing and moisturising ingredients. Reynolds comments: "Doctors are beginning to welcome the fact that skin problems such as acne can be treated and controlled with the use of cosmeceuticals, with no side effects." Jan Marini's C-ESTA Serum Oil Control claims to combine many benefits in one. It inhibits oil breakthrough while reducing the appearance of fine lines and wrinkles, lifting and tightening the forehead and eyelid area.

Lancôme's latest solution for oily



skin is Pure Focus, which uses micro-captors which have been combined with a blend of active purifying agents to go as deeply into the pores as possible and absorb excess sebum at the root. Pure Focus claims to give the appearance of reduced pores and a long-lasting matt effect. Bioré's new cleansing range focuses on solving pore problems. The four new products in the Pore Perfect range Warming Blackhead Fighting Cream Cleanser, Blemish Fighting Ice Cleanser, Pore Unclogging Scrub and Triple Action Toner - use salicylic acid to prevent clogging.

Cleansing action

Cleansers have also followed the skin care trend to offer ever more specialist solutions. Lancaster has launched a feel-good line of cleansers with products for dry delicate skin, for normal to oily skin, for women who prefer rinse-off cleansers and for women who want a 3-in-1 cleanser. Each contains a different combination of two floral scents. Estée Lauder has also developed a new cleansing range which combines algae extract, clary sage, lemongrass, cucumber, lotus flower and sundew to purify without stripping oily skin, white water lily, senega and bearberry for normal/combo skin and edelweiss, passion flower and salicaire to soothe and soften dry skin.

Natural extracts were an important consideration when the new Paul & Joe skin care line was created. Launched in February, it includes facial soap, cleansing milk, moisture lotion and serum, designed to protect, treat and soothe the skin and mind. All of the products contain extracts of elder, white lily, horse chestnut and orange flower water. Aki Wagai, regional manager of Albion, which formulated and manufactured the range says: "We felt that there was a gap in the Japanese skin care market - products are either very scientific or all natural and almost medicinal. Albion wanted to create something for Paul & Joe that was a balance between the two, a pure union of natural and technology harmonising to create porcelain-like stress free skin... I believe there is a trend for not being overly aggressive on the skin - more about purifying and treating the skin, enabling your skin to be the best it can be." The star product is Moisture Lotion, says Wagai, which incorporates micro emulsion technology, which enables highly emollient oils to be incorporated into a very lightweight lotion. "The oils that have been used are very similar in molecular structure to that of our own skin,



this means improved absorption and compatibility with the skin," adds Wagai.

Water babies

New moisturisers have been geared towards offering the skin a stable environment and constant hydration. "If you are exposing skin to constant stress, cells cannot develop any significant mechanism to defend themselves... the key is to make sure skin is in isolation from varied humidity," says Maes. Estée Lauder's Hydra Complete forms a thin layer over the skin to isolate it via use of phytantriol, biosine, muru muru butter, cactus



Skin Doctors' Relaxaderm - one of the new generation of botox-effect facial relaxers

flower and mohave yucca. Chanel has developed Hydramax + to correct dehydration. It is a range of three moisturisers which combine extracts of butterfly lavender and samphire. The product was tested in the Jules Verne Climatic Wind Tunnel in Nantes, France, a facility typically used by the automobile, space and construction industries to recreate extreme environmental conditions. The first environment in which the product was tested reproduced the conditions of an aircraft cabin and the second a mountain atmosphere. The corrective effect of the product led to increased hydration of up to 50% greater hydration in less than five hours.

Lancaster's hydrating moisturiser, Revolcanic uses pure volcanic water to balance hydration in the cells and Mediterranean chrythmarine to improve ceramide synthesis, combined with the Deep Hydra Complex to help restructure the extra cellular matrix. Light reflecting pigments offer an optical effect so that skin immediately appears more luminous and even.

Pre-moisturisation products dedicated to offering radiance are slipping on and staying put on dressing tables as they take another step in women's beauty regimes. Sensation Totale from Lancôme is a vitamin C-based complex that is delivered via a time-release system so that skin is given a vitamin-boost throughout the day.

Consumers are also making room in their homes to enjoy salon-strength products, a burgeoning sector which has achieved huge growth, says Mintel. "Blue Skin's Pause Anti-Stress Face Mask offers a convenient blister pack format that mimics the salon product but is easy to use and a cheaper alternative to attending a beauty salon," says David Jago, head of the global new products database at Mintel. Likewise, Cellex-C has launched Speed Peel Facial Gel for home use, a product which provides fast, thorough exfoliation to gently peel away superficial skin cells. Medical researcher and skin care expert Jo Joynt has developed a skin care range that is used in salons with the ultraderm facial. Exfoliating Facial Wash uses mandarin, neroli, jojoba spheres, coral seaweed and fresh royal jelly, and Reviving Facial Toner combines white grape, royal rose, honey and fresh royal jelly. Luxury Moisturiser with Almond, Silk and Honey, Nourishing Cream with Aloe and Honey and Reviving Mist with apple blossom and spearmint complete the range.

Table 1 - Skin care market retail value (US\$m), 2003

Country	Value	% 02/03
France	2,873.0	7.2
Germany	2,361.9	1.2
Italy	1,749.6	1.3
Spain	800.7	6.4
UK	1,409.5	6.3
USA	6,881.2	3.2

Source: Euromonitor

Table 2 - Global skin care market sizes by sector (US\$m), 2003

Sector	Value	%02/03
Skin care	38,481.4	14.3
Facial care	29,903.6	14.6
Body care	7,216.3	13.3
Hand care	1,361.5	13.9

Source: Euromonitor

Male interest

With skin care the fastest growing category in the men's grooming market, it is no surprise that companies already established in this sector are achieving exponential year-on-year growth. Clarins Men has reported an increase of up to 58% in major store groups in the UK and claims similar success story worldwide. Lionel de Benetti, head of R&D at Clarins comments: "Men are more and more interested in skin care products, not only for the comfort they can provide but also for anti-ageing benefits. But a product range for a man must be simple to understand and use. This is what we are trying to do with Clarins Men." This month, the brand adds Total Wrinkle Control to its range, a light-weight cream-gel which claims to soothe, smooth, stimulate collagen production, boost skin renewal, even skin tone and stimulate the skin's natural defences. Nivea for Men has added a Sensitive range of skin care, a face wash and daily moisturiser, to complement its successful Sensitive shaving line. And several other companies have expressed an interest in launching their own ranges to take their share of the market before it requires some anti-ageing treatment of its own. "We're looking at skin care in more detail, but are looking into where Gillette would sit in the market," says George Allan, business unit director for blades & razors at Gillette. "Is there a niche for Gillette to be seriously involved in skin care? As the gap between grooming and cosmetics narrows, maybe that is when we'll have our opportunity. If we do it, it will be global." Estée Lauder has gone a stage further and is already working on ideas for a new product for men. "The demand for men's skin care is increasing infinitely. Men are simply waking up and caring for their skin - it is a very recent boom," says Maes.

A mature market

The growing economic and demographic influence of women and men over 50 has been a recurring subject at many trend seminars over the past year. In 2010 women over 50 will represent 40% of the female population, and men and women over 55 are currently enjoying a further 20 to 30 years in retirement. These figures fit with contemporary thinking which, according to Wilkinson is that: "Beauty is seen as a right, not an advantage." This is a hugely important market for the future. Clarins has launched Super Restorative Day Cream and Night Wear for this age group. The Day Cream incorporates acacia micro-pearls which are claimed



Chanel's Hydramax+ was tested in the Jules Verne Climatic Wind Tunnel

to lodge themselves in wrinkles and fine lines. The Night Wear is said to protect against nocturnal free-radicals, while repairing and protecting the skin, and 'dressing' the skin in flattering soft pink pigments for a rested appearance. Meanwhile, L'Oréal Paris focused on the use of pure vitamin C, delivered to the skin via a stable derivative called vitamin CG, in Age Perfect. The product, which is also formulated with Elastium, a fibre technology, Collagen Boost and Melanin Block, claims to de-crinkle and illuminate the skin immediately upon application.

Another area that cosmetics companies are exploring is the market created by dermatologists who perform micro-dermabrasion, peeling and laser procedures. "We want to help the consumer who decides to have cellular treatment by a dermatologist, by improving their healing," says Maes. We are trying to understand the mechanisms that are going on in order to restore the skin as quickly as possible." Bio-Col Marine products are recognised by cosmetic surgeons and dermatologists for their healing and regenerating properties. The products, which have just been introduced

to the UK, feature a concentrated soluble marine collagen derived from warm-water tropical fish. The Marine Day (Hydrating) Serum can be used to treat blemishes and blotches while the Night (Regenerating) Collagen Serum stimulates the formation of new skin cells.

A clear path

It may seem as if the skin care market is spinning off in a hundred different directions, but the future is looking jaw-droppingly clear. Triggering skin's natural healing by mimicking what it does is just the start of a whole new face of skin care. Wilkinson states that 'genome' beauty, or 'Bio' is the next big thing in the beauty sector - enhancing what the skin does naturally. "Stem cell beauty is also on the rise to create and regrow skin, hair, teeth and muscle. Cosmetic use of stem cell skin growth will outstrip medical use." Research is being done into creating synthetic versions of the fluids babies are coated in to protect the skin from infection and damage during birth.

Jan Marini Skin Research has been awarded a patent for a topical anti-ageing treatment based on Thymosin B4, an ingredient found in all human tissue, and particularly concentrated in the spleen, thymus, lung and peritoneal macrophages. "Research shows that Tb4 stimulates new blood vessel growth, reduces inflammation, can reduce free radical levels, appears to reduce the appearance of sun damage and benefits the ageing skin." says Reynolds. According to Amoroso, "this really is the first time since the introduction of ingredients such as alpha and beta hydroxy acids and retinols that real breakthroughs are being discovered". She highlights Antarcticine, a glycoprotein that is being hailed as an extremophile, a 'survival' molecule that thrives in extreme conditions. "This breakthrough works by kick starting your skin's own survival mechanism - once applied it can actually mimic this survival instinct on your skin. This means your skin, relieved of the burden of fighting external aggressors, can concentrate on healing and replenishing itself. It has a dramatic plumping effect and has actually been shown to increase collagen and elastin levels in the skin."

Estée Lauder is working in many different areas of research, but all with the same goal - to restore the skin's natural function. Maes comments: "We are discovering a way of effectively protecting the skin by reactivating the skin's own protection reactivity." As Wilkinson says, cosmetics of the future will "rebuild the human form from the inside out."

Table 3 - Global brand % share of the skin care market, 2003

Brand	Share
Nivea Visage (Beiersdorf)	4.0
Avon (Avon Products)	3.9
L'Oréal Dermo-Expertise (L'Oréal Groupe)	3.2
Nivea Body (Beiersdorf)	3.0
Olay (Procter & Gamble)	2.8
Estée Lauder (Estée Lauder Cosmetics)	2.5
Lancôme (L'Oréal Groupe)	2.4
Clinique (Estée Lauder Cosmetics)	2.4
Shiseido (Shiseido Co)	2.0
Pond's (Unilever)	2.0
Sofina (Kao Corp)	1.8
Clarins (Clarins)	1.6
Neutrogena (Johnson & Johnson)	1.6
Vaseline Intensive Care (Unilever)	1.4
Kanebo (Kanebo)	1.2

Source: Euromonitor