

The truth will out

Skin care is evolving faster than ever with independent clinical trials and new standards in natural and organic cosmetics separating fact from fiction, as Jo Allen reports

The face of skin care is about to change. It is finally time to wind down the story telling, peel back the fiction and reveal the products that work... and the industry, it seems, is only too willing to help. There is likely to be a significant shift in how skin care products are tested in the future, and media coverage appears to have been the instigator.

Always controversial, often provocative, skin care is no stranger to hitting the headlines. But over the past year the number of documentaries and articles that have tested skin creams has sky rocketed. And they mostly share one aim - to reveal *The truth about beauty creams*, as a recent *Dispatches* documentary was called. The media scrutiny has at times resulted in other products enjoying a phenomenal growth in sales (a recent example is supermarket Aldi's £1.89 Siana cream which sold over 20,000 units a week) and at others served to deride virtually every product on trial. Stewart Long, skin care scientific adviser, Boots, comments: "We are all aware of the positive and negative aspects of the media - we all buy into that. *Horizon* approached its programme with a scientist of great professional repute [Professor Lesley Regan, division of

paediatrics, obstetrics & gynaecology, Imperial College London]. *Dispatches* was one-sided and had a clear agenda, didn't seek an independent view and tested in uncontrolled conditions. We are quite happy for programmes to talk about the science of products but we are pushing for more, and independent data."

Indeed the ramifications of the *Horizon* programme are still being felt. In January Boots launched a full Protect & Perfect skin care range, with a day cream moisturiser with SPF15, a night cream, eye cream and body moisturiser sitting alongside its coveted Beauty Serum. "The range," says Long, "has been the most successful launch Boots has ever done at any time in its history." Boots continues to test the range, and to date has performed 29 tests with large studies spanning 1300 women around Europe. "Because it is such

a high profile product we wanted to be confident that people were getting what they want. For us, it's raised the bar. It has to work." The tests are a mix of self-assessment, instrumental testing and direct measurements of whether antioxidants protect against free-radical damage, which is "a big issue in the industry," says Long.

Dermatologist Dr Nick Lowe, who launched his own skin care range in Boots last October, says: "It is refreshing to see science done on a single product."

In fact it seems the future of the \$65bn skin care market may well depend on such trials. A new study by Professor Chris Griffiths is on an experimental Boots formulation (not, as some reports have suggested, further tests on the Protect & Perfect Serum), and is the first double blind randomised controlled trial of a skin care product. The results will be published in a journal. "Chris wants it to appear in a peer-reviewed scientific journal before it is talked about," says Long. The step is unprecedented, but Boots believes that for the skin care industry, this type of independent testing is the future. Long adds: "The thing about premium skin care is that there is so much out there. You can pay £10 and find a product that really works, or £200 and have a product that may work spectacularly or not at all. For the consumer it is difficult to know which product does work. It's in our interest to test that our products work. So



TABLE 1 - GLOBAL SKIN CARE MARKET BY COUNTRY, 2007 (US\$M)

Country	2002	2007
US	6,751.2	8,059.2
France	2,391.1	4,368.0
Germany	1,975.1	3,239.3
Italy	1,440.0	2,340.4
Spain	956.4	1,897.9
UK	1,612.7	2,937.6

Source: Euromonitor International

TABLE 2 - GLOBAL SKIN CARE MARKET SIZE BY AREA, 2007 (US\$M)

Sector	2002	2007
Skin care	40,957.6	65,674.6
Facial care	32,743.1	52,139.9
Facial moisturisers	12,663.6	19,948.5
Nourishers/anti-agers	7,609.0	14,896.4
Facial cleansers	6,372.3	9,039.9
Toners	4,003.8	5,035.9
Face masks	1,262.2	1,907.7
Lip moisturisers	832.1	1,248.4

Source: Euromonitor International

you'll see much more of it from us in terms of rigorous studies with dermatologists and published data."

The results of Griffith's clinical trial, which will be published imminently, are eagerly awaited, not least by Dr Richard Weller, senior lecturer dermatology, University of Edinburgh. "What will be really interesting is if the formulation is found in this trial to genuinely change the structure of the skin." This particular formulation may not be sold commercially, thereby avoiding any threat of regulatory infringement, but it is a fascinating exercise.

Any product that is sold as a cosmetic and contains cosmetic ingredients at approved levels and yet is proven to genuinely change the structure of the skin, could, says Weller, be presented with two outcomes. "Either the regulatory authorities could say you can't sell the product because it's a drug, or say that it has always been called a cosmetic and keep on calling it a cosmetic. This would raise the bar for every other cosmetic company. What is interesting is whether cosmetic companies would then change their market models. I think cosmetic companies do good research but I wonder if the market is going to change and they are going to have to do openly published studies to prove their creams work. Some will go bust because the products are tested and do nothing, others will be taken off the shelves for doing too much. But whoever gets it right and gets through will be the market leaders. It could be a market leader or die situation."

For any cosmetic company this of course means taking a huge risk. "Companies are terrified of the outcome," notes Weller. Yet the pressure is on from consumers who are demanding proof, more than ever before, that a product works.

Daniela Rinaldi, perfumery and concessions controller at Harvey Nichols, tells **SPC**: "I think the consumer is far more savvy than ever, for example they are asking about product ingredients and listings. If they



Skin lightening is a growth sector but is crying out for scientific development

perceive something has been independently tested, it has more gravitas." Long adds: "I would agree that people, proved by the effect of the *Horizon* programme, are looking for evidence that is credible and that shows these products work."

It may well be just a matter of time before a cream hits the market backed by some solid independent clinical evidence that it works. Besides, an important move has been made in the regulatory field which sends out some positive signals. Long says: "At ASA (Advertising Standards Authority) meetings they have accepted that you will physiologically change the skin when you apply a product, and that it doesn't necessarily mean it's a medicine. If we are dealing with wrinkles and skin ageing this is a cosmetic problem. A hand cream will improve the condition of the skin and there have been good studies that show the number of lipids in the skin will increase. Similarly, if you just put water on your skin for a week it will change and go dry. The ASA is accepting that something must happen to skin, that it will respond to a product that is on it, and that it is not necessarily a bad thing."

WHAT LIES BENEATH

The industry is in the midst of a further quest to reveal the truth behind skin care. This year is proving to be a significant year for the development of new standards in natural and organic cosmetics and will

result in the demarcation between pure and pseudo products. Later this year, the European standards of natural and organic cosmetics is expected to be unveiled. It is a development that has already been dogged by delay but a move that will give certified natural and organic cosmetic products uniform logos for the first time. Organic Monitor notes that "the successful implementation of these standards could pave the way for EU regulations for natural and organic cosmetics, similar to those for organic foods". A number of private standards have also been introduced by certification agencies, industry groups and retailers: Whole Foods Market launched its Premium Body Care Standard to separate products that meet "the strictest standards for quality, environmental impact, results and safety" from inferior cosmetics. The Organic and Sustainability Industry Standards (OASIS) for beauty and personal care products has been developed by a trade group including manufacturers Aveda and Hain Celestial, while natural and organic personal care standards have also been unveiled by US-based NSF International and Toronto-based Certech Registration. Such standards are important in building consumer trust and also raising the game for manufacturers.

Amanda Le Roux, general manager of Aveda Europe believes: "The consumer is benefiting from the plethora of standards because it increases awareness of the environment and of the need to create higher expectations in how we conduct business. Aveda looks forward to a global, harmonised standard in the future. However, increased awareness is a step in the direction towards creating those global standards."

In fact Aveda recently raised the benchmark for other companies claiming its commitment to environmental responsibility

TABLE 3 - LEADING GLOBAL SKIN CARE BRANDS BY RANKING, 2007

Brand	Company
1 Avon	Avon Products Inc
2 Olay	Procter & Gamble Co
3 Nivea Visage/Vital	Beiersdorf AG

Source: Euromonitor International

by being the first beauty company to achieve Cradle to Cradle ingredient certification. Four of its most used botanical ingredients were certified - sandalwood oil, rose oil and lavender oil from Bulgaria and uruku from Brazil. "C2C certification not only benefits the consumer," says Le Roux, "but also the beauty industry as a whole, as it provides a scientific measurement of progress and commitment." In addition it is the first beauty company to manufacture with 100% wind power. Such credentials sit favourably alongside the launch of Aveda's new Green Science skin care line, a high-tech lifting and firming range to minimise lines and wrinkles. The certified organic, sustainably sourced, ingredients include argan oil as a fatty acid replacement and lipid replenishment, plai oil as an antioxidant and anti-inflammatory, and cactus to inhibit the deterioration of collagen.

Certification is also the backbone behind a new US line whose products display the USDA logo (certified as containing at least 95% organic ingredients) and/or the Circle of Green certification. Developed by plastic surgeon Dr Domanskis, the line aims to eliminate wasteful packaging, with oversized products, recyclable packaging and an online recycling programme that is offered for all product purchases.

TRADING DOWN

But it's not just the testing of skin care and adoption of new organic standards that is changing the face of the market, there may also be a nip/tuck effect on the pricing of products. The prospect of a global credit crunch has led to a softening of demand across retail markets in the US and European countries. Rinaldi observes: "There is no doubt that trading has been softer but at Harvey Nichols we are slightly closeted from the high street as our customers still have disposable income." However, for the skin care industry, the pricing issue runs deeper. Dr Nick Lowe tells **SPC**: "I have consistently said that you do not need to spend high or modestly high amounts of money to get efficacy. We have looked

at other, more expensive products and the efficacy on ours is better. In general it is not the ingredients that are the expense - if you look at active ingredients in some £30 to £100 and £100 to over £500 products the ingredients are not significantly different, and they can't be for non-prescription products. I think the high priced market will be challenged. It's been a marketing driven misconception that the more expensive the range the better. But that's not true." Lowe's skin care range, which is sold exclusively at larger Boots stores, is labelled as the most affordable Dr brand on the market and is said to prove that effective skin care need not be expensive, with prices from £8.95 to £19.95. It is "logically formulated", says Lowe, being built around two regimes, Prevention and Repair, with each product containing one of four Cranley Complexes: Anti-Age, Anti-Blemish, Soothing, Illuminating. There are seven anti-age products, four anti-blemish products and two skin solutions products, with the Super Charged SPF15 Day Cream (that features UVA protection tested on Boots' UVA star system) selling out in four weeks.

Good Skin, the US brand from BeautyBank (Estée Lauder) which is launching in the UK this month at Superdrug stores, is similarly priced. Steve Hasher, vp research and development, Good Skin, comments: "This brand was developed for people who require and expect high quality, dermatologist formulated skin care that's easy, effective and affordable." The range features simple categories: Basic Care for cleansing, exfoliating and hydrating, and Specialized Care products, which are targeted formulations that address Dull or Ageing Red/Sensitive and Severely Dry skins. Selection is said to be simple, with colour coded packaging by skin condition, and with these elements the brand is hoping to reach "a new,



The trend for premium products is now impacting the mass market. P&G describes daily 3 point treatment cream as its first "luxury supercream"

younger customer". It is particularly proud of its targeted Basic Care products, such as Instant Lightening Eye Cream, Microcrystal Skin Refinisher and the All Firm products (Moisture Cream and Rebuilding Serum) in the Specialized Care category.

And with skin care, as it is with high street fashion, it seems no

price can be too low for consumers. As the winner in *Sunday Mirror's* Celebs on Sunday 2008 Beauty Survey, beating three under £20 mass market anti-ageing creams tested, Aldi's £1.89 Siana Moisturising Anti-Wrinkle Day Cream consequently sold out in dozens of branches. Meanwhile glowing reviews on a parenting website led to soaring sales of Waitrose Baby Bottom Butter as mums found benefits when they used the product as a face cream.

If consumers in the UK are looking to trade down, manufacturers across the pond are getting ready too. Dr Semel's Timelapse Wand, a "wrinkle cream in a stick," is billed as an affordable alternative to pricier skin creams. Semel quips: "Times are tough. If you fill up your car, you might not have anything over to fill up your face or Botox it. Many of the creams on the market, at upwards of \$100, don't offer much relief. For a \$25 stick that lasts about a month, the Timelapse wand is affordable for most budgets." It contains Spanish lavender oil which is claimed to help inhibit muscle contraction and hydrolysed wheat protein to produce a relaxing effect to smooth out facial expression lines.

Whether the economic situation will affect the upper echelons of skin care remains to be seen, but so far it has done little to dampen the launch activity for super luxe products. Clarins' customisation range My Blend by Docteur Courtin is priced between \$175 and \$250 - triple that of regular Clarins products. Currently available only in the US, it comprises 225 possibilities of variation based on 65 references where customers can tailor the products to their personal requirements. Meanwhile Guerlain has added a £215 serum to its cult Orchidée Impériale anti-wrinkle range. Karen Grant, NPD Group's senior beauty industry analyst says: "Skin care's royal affair with premium products continues to expand judging by the growth we have seen in premium and super premium products." In the US sales of premium facial products priced \$70 and



above approached \$700m in 2007. The trend is even impacting the mass market, with Olay launching its own high priced unguent Regenerist Daily 3 Point Treatment Cream, billed as its first “luxury super-cream”. The £29.99 price is certainly no deterrent – it sold one every minute at its launch on Boots.com last month. Weller adds to the argument: “We are entering a recession. But the fact is that people like to spend money on themselves. Surely that is a big part of the cosmetic world.”

Another trend that is gathering momentum is holistic skin care. A recent study showed that a tomato-rich diet could potentially reverse the skin-ageing process since the antioxidant lycopene, present in tomatoes, is able to reduce sun damage in the skin. While the effect was equivalent to applying a sunscreen with a tiny SPF of 1.3, the study highlights the interest that holistic skin care is generating. Wellness brand Skin Nutrition, which became internationally available last year, is a line that aims to treat the whole body. The three-step approach



The prospect of a global credit crunch means consumers may trade down. Dr Nick Lowe is pitched as the most affordable Dr brand

includes Advanced Peptide Therapy face serums that claim wrinkle reduction and skin resurfacing properties, body treatments with marine extracts to tone and restore and a range of nutritional supplements to reduce internal inflammation and promote healthy skin – such as Pharmaceutical Grade Omega-3, capsules that are said to contain the most potent form of Omega 3 available. Joanne Purvis, brand manager comments: “Many prominent people in the industry

believe the future lies in holistic well-being to drastically slow down the ageing process. It’s the future of skin care and is of great interest all over the world.” Eco-friendly skincare line Nude, a brand which is gaining momentum in the UK, has a range of probiotic whole food supplements, while in France, Dior became the first brand in the selective market to launch an oral supplement to complement a topical skin care line, adding Soins Anti-Age Oral Multi-Perfection to its Capture Totale range.

Similarly, skin lightening is a “small but certainly growing” sector, says Rinaldi, with recent innovations in this area including Darphin’s Clear White range that is designed to help diminish the appearance of dark spots and discolourations while promoting a vibrant complexion. Clear White Brightening and Soothing Serum contains vitamin C and mulberry extracts to brighten the skin, while the Brightening and Hydrating Cream incorporates liquorice, vitamin C and rice extracts for the purpose. And Clark’s Botanicals, a US

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line that launched last July to target issues in a broad spectrum of skin types incorporates a kojic acid and liquorice-based skin lightening cream (Kojic Cream), which claims to quickly and aggressively target dark spots. Lowe, however, believes that the sector needs more work. "The majority of OTC skin lighteners are modest or minimal in their efficacy. It's an area that desperately needs science and development."

WRINKLE RIVALS

Meanwhile, other areas of development are vying for the title as the new gold standard in skin care. First up is stem cell technology. A couple of successful niche products (Amatokin and ReVive's Peau Magnifique) were followed by heavyweight brand Dior with Capture R60/80 XP, its first line based on stem cell research at the Dior Innovation Centre. It incorporates Stemsome, a multi-layer vector system that is claimed to "liberate stem cells in the epidermis and help sustain their reproductive capacities". There are three active ingredients: Bi-Skin works on the

surface of the wrinkle for a smoothing effect, TP-Vityl claims to restart cellular activity by protecting the stem cells, enabling new cells to form, and Bionectine is said to strengthen the skin from underneath the wrinkle.

Meanwhile NV Perricone's latest product Stimulcell claims to be unlike other stem cell creams, containing all 145 'signals' that are emitted by stem cells to initiate the regeneration and renewal process. It helps regenerate the skin's appearance by encouraging the delivery of peptides, proteins and lipids to the skin responsible for surface restoration and renewal. And a report in the *Korea Times* stated that Seoul-based bio technology company RNL Bio is in final negotiations with P&G to mass produce a cream that contains proteins produced from stem cells in a lab, which are extracted from human placentas, to stimulate adult skin cells to replenish themselves faster.

Light-based treatment devices are generating much excitement as they beam their way from spas to the home use market. The devices use Intense Pulsed

Light to reduce wrinkles and improve skin. Industry giants P&G and L'Oréal have moved into the field, signing agreements with Syneron and Light BioScience respectively to launch home use products, while a product which has already experienced "excellent" sales since last year's launch is the RejuvaWand by Light Dimensions. Using red and infrared light therapy and a gentle massaging action, the device claims to make visible changes to skin in 30 days or less. Long comments: "Everyone is interested in this as an area. We will see a huge trend in it. Such intervention can make a visible difference to skin." Lowe adds: "I have seen a lot of research and they are definitely slightly effective - but they can only be slightly effective because they have to be safe for an untrained person to use on their own skin."

There is always a buzz surrounding skin care. But if today is buzzing, tomorrow promises to blow us away completely. "Over the next five years, we will see products that make genuine improvements in the appearance of skin," says Long. "There will also be less story telling." **cb**



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