

# No Appointment NECESSARY

For consumers who want to hide the signs of aging without the downtime or breaking the bank, skin care marketers say they have the right prescription. A list of new skin care ingredients begins on p. 108.

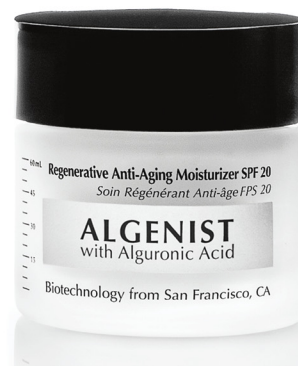
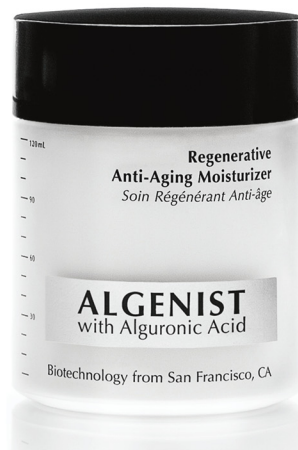
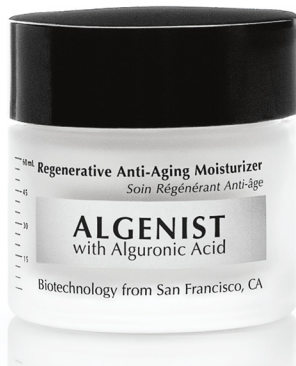
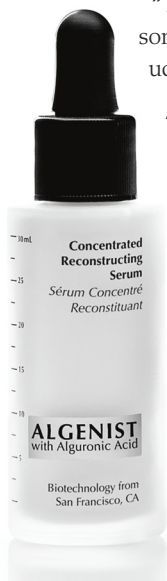
Christine Esposito • Associate Editor

**B**ACK IN THE DAY, when a woman wanted some “work done,” she set up an appointment with a dermatologist or plastic surgeon for what could lead to an expensive and invasive procedure that required a few days in seclusion and a big pair of sunglasses.

While nips and tucks are still being booked, when it comes to hiding the signs of aging in 2011, more consumers are hitting the bottle—the skin care serum or cream bottle, that is. With increasingly sophisticated formulations, marketers are promising big payoffs from their non-prescription topical products which are designed to banish lines and wrinkles, slough off dead cells and restore luminosity.

“There is so much science behind some of the latest skin care products. There has been a lot of work

**An industrial biotech company is jumping into skin care market with Algenist, a line formulated with aluronic acid.**



in elucidating the mechanism behind aging, sun damage and pigmentation that we are getting products which specifically address these mechanisms,” said Dr. Tess Maurico, founder of Scripps Ranch Dermatology & Cosmetic Center in San Diego, CA and Dr. Tess Dermatology in La Jolla, CA. “The industry is also working very hard in delivering products that are also better tolerated, safer and more effective than ever. The right skin care products can definitely do much more than feel good on your skin.”

The anti-aging movement—backed with heavyweight advertising campaigns—has been rocket fuel for the skin care marketplace, propelling sales even during slower economic times. In fact, the prestige skin care market has been one of brightest stars in the beauty category overall. According to The NPD Group, Port Washing-

ton, NY, prestige skin care not only made up lost ground during the recession, it surpassed pre-recession levels, rising 8% to \$2.7 billion in 2010.

“Facial skin is one area where women continue to be most likely to invest and spend more,” said Karen Grant, vice president and senior global industry analyst with NPD.

Premium face products—those \$75 and above—experienced a 7% dollar increase from 2009, according to NPD’s data, far outpacing the growth of its mass market counterpart. For the 52 weeks ended March 20, sales of facial anti-aging products in supermarkets, drug stores and mass merchandisers (excluding Walmart) rose just over 2% to \$796 million with units just about flat at 47.7 million, according to SymphonyIRI (see chart on next page).

## Right at Home

In response to growing interest in less invasive procedures to correct the signs of aging skin, marketers are promising consumers professional results from

topical products that can be used in the comfort of their own home with a price tag that's more affordable.

Take Avon's Anew Clinical Lift and Firm Pro Serum. The direct seller says the new serum is the brand's first topical serum with two injectable-grade ingredients—PVP and arginine. At \$54, the treatment is said to make skin around the jaw line look and feel dramatically firmer after four weeks and make contours look refined and sculpted after two weeks.

Procter & Gamble was one of the first to take the leap into the realm of professional mass with Olay ProX in 2008. Johnson & Johnson has followed suit with Neutrogena Clinical. This anti-aging line contains "multi-patented Ion<sub>2</sub>Complex," a new technology that leverages bioelectricity, the native electric current that cells use for a variety of functions including signaling one another through cell-to-cell communication.

According to J&J, the skin uses this positively charged ion flow to help maintain



**Atopalm skin care products feature a patented multi lamellar emulsion system that mimics skin's mixture of ceramides, cholesterol and fatty acids.**

the ongoing creation of collagen, but as the body ages, the flow decreases, resulting in diminished cell-to-cell communication and decreased production of essential proteins, including collagen. By harnessing bioelectricity to facilitate optimal communication at the surface level of the skin, skin firm-

ness is restored for noticeably improved facial definition, and a reduction in the appearance of wrinkles and sagging skin.

The Neutrogena Clinical range includes Facial Lifting Wrinkle Treatment SPF 30 (\$39.99), which also contains Neutrogena's exclusive Helioplex; Eye Lift Contouring Treatment (\$39.99); a Lifting Wrinkle Treatment Starter System with SPF 30 and Eye (\$49.99); and Facial Lifting Wrinkle Treatment Night (\$39.99). Each is a two-step regimen that starts with the application of the Ion<sub>2</sub> Complex Gel Serum followed by an activating cream. Formulated with Tetrol-E (derived from amino acids), the activating cream maximizes the power of the Ion<sub>2</sub> Complex technology, delivering a visibly firmer and more lifted look, according to Neutrogena.

In the direct sales channel, Amway's Artistry brand is touting more clinical-like results via its new intensive renewing peel. When used twice weekly for six weeks, the peel provides benefits comparable to a

## Anti-Aging Skin Care for the Masses

For the 52 weeks ended March 20, sales of facial anti-aging products in supermarkets, drug stores and mass merchandisers (excluding Walmart) rose just over 2% to \$796 million with units just about flat at 47.7 million, according to SymphonyIRI. Here is a look at the top 10 brands in the category.

	Dollar Sales	Dollar Sales % Chg Y Ago	Unit Sales	Unit Sales % Chg Y Ago
<b>FACIAL ANTI-AGING</b>	<b>\$796,053,900</b>	<b>2.02</b>	<b>47,764,980</b>	<b>0.79</b>
OLAY REGENERIST FACIAL ANTI-AGING	\$89,031,550	(3.29)	4,523,498	(2.92)
L'ORÉAL DRM EXPERTS ADVNCD REVITL FACIAL ANTI-AGING	\$50,427,740	(13.30)	3,509,993	(15.49)
PRIVATE LABEL FACIAL ANTI-AGING	\$42,303,860	25.30	3,541,372	24.50
OLAY PROFESSIONAL PRO X FACIAL ANTI-AGING	\$39,439,620	(4.45)	839,926	0.05
OLAY REGENERIST MICRO SCULPTING FACIAL ANTI-AGING	\$38,116,600	51.90	1,538,731	51.53
OLAY AGE DEFYING FACIAL ANTI-AGING	\$34,627,330	2.23	3,014,900	2.47
OLAY TOTAL EFFECTS 7X FACIAL ANTI-AGING	\$27,202,170	5.42	1,386,314	5.47
NEUTROGENA AGELESS INTENSIVES FACIAL ANTI-AGING	\$25,248,680	8.54	1,357,933	13.22
L'ORÉAL Dermo Expertis AGE PERFCT FACIAL ANTI-AGING	\$20,254,180	2.25	1,426,944	2.60
ROC RETINOL CORREXION DP WRINKLE FACIAL ANTI-AGING	\$18,336,840	6.10	904,215	7.89

Source: SymphonyIRI

professional chemical peel, according to Amway.

What's behind the peel? The key ingredient is mucor miehei mushroom enzyme, which is said to mirror the activity of exfoliating enzymes produced naturally in the skin. The self-neutralizing enzyme works with skin's pH level to detect and dissolve dead skin cells. When it encounters the higher pH levels of active skin, the exfoliating process automatically shuts off, protecting healthy skin.

According to Jillian Vitale, lead marketer for the U.S. launch of the new peel, Amway researchers created a 100-step process to distill the mushroom extract down to the extremely pure state that provides distinct advantages. According to Vitale, acid peels dissolve the skin until they are neutralized by a second product, which can increase the risk of over-peeling (leading to redness and irritation) if the acid step is left on too long.

"When you look at OTC peels that are two or more steps, there is some guess work involved," Vitale said. "The instructions tell the user to apply the acid base and leave it on for a set amount of time and then apply a second product to neutralize. It doesn't account for users who are 20 years old versus 55 years old who are using the same peel; not everyone has the same level of dead skin."

According to Vitale, Artistry's mushroom enzyme will dissolve protein bonds that hold dead skin, but as soon

as it gets to the 4.5-5.5 pH of live skin cells, it is no longer active. "It is one-step and is able to customize the duration of activity for each person—this eliminates the risk of over peeling the skin," she said.

Artistry contends the new peel also tempers the "fear factor" and high cost of professional treatments. At \$99.50 bottle, it provides the equivalent of 12 peels, according to Artistry, which is positioning the SKU as the first in a new series of at-home alternatives to dermatologist procedures designed to complement its flagship Time Defiance anti-aging line.

### The Space Between

According to Vitale, Artistry's R&D team developed the peel for three years, after recognizing the increase in dermatological procedures and the growing interest in natural ingredients. "We were trying to find the space where those two trends could exist harmoniously," Vitale told HAPPI.

Industry observers are keeping a watchful eye on other products that ride the line between categories and trends—think anti-aging makeup, multi-tasking treatments and products that offer natural and clinical attributes. Any one of these could be the next big wave in skin care, say experts.

In that respect, there are high hopes for products like Origins Plantscription. The new anti-aging serum has been lauded as "one of the most significant prod-

uct launches in the history of the Origins brand" by Jane Lauder, global president and general manager, Origins.

Researched for more than five years in partnership with plant scientists at the University of Strasbourg in France, the anti-aging serum is said to combat multiple causes of aging skin, visibly correcting lines and wrinkles and loss of firmness by helping to rebuild natural fibrillin, collagen and elastin with the help of key ingredient African Anogeissus. Found in the Republic of Ghana, the bark of Anogeissus is particularly concentrated into compounds able to stimulate the natural production of fibrillin. In tandem with Anogeissus, Siegesbeckia (a small shrub native to eastern Asia used in Traditional Chinese Medicine) and rosemary extract help protect natural collagen and elastin while scutellaria root, apple extract and cucumber extract visibly address and improve skin discoloration.

Origins conducted a 20-week study of women ages 42-63 in which researchers biophysically measured a dozen different skin parameters including lines, wrinkles, firmness, lifting, clarity, radiance, smoothness, evenness of tone, age spots, redness and pore size. Plantscription received the best line and wrinkle clinical test results in Origins' history; 88% of the visible wrinkle-reducing power of a leading prescription wrinkle ingredient, but without the effects of photosensitivity, skin shedding, burning, stinging, redness, dryness, flaking and itching, according to the Estée Lauder-owned brand.

Another product finding the white

**Look out skin care marketers—the company that put mineral makeup on the map, Bare Escentuals, has expanded its skin care collection.**





space between categories comes from luxury beauty firm La Prairie. Rolling out this month in the Cellular Energizing Collection is Cellular Energizing Body Lotion, which walks the line between scent and treatment. More than your basic scented body product, this creamy hydrator features a multi-vitamin complex that penetrates skin rapidly to deliver antioxidant protection. It features Cellular Complex, which combines glycoproteins, ginseng root and horse tail extracts to help nourish and energize the skin, grape seed and rice bran oils and shea butter to help moisturize and white willow bark extract to enhance and brighten skin tone. The citrus scent is equally intriguing—top notes include ruby red grapefruit, Italian bergamot, cardamom and verbena and the heart contains Mandarin tree blossom, jasmine petals, green mate, osmanthus and apple blossom. Base notes are velvet musk, golden amber, clary sage and oak moss.

### Digging Deeper

Just as anti-aging propped up skin care, minerals stirred up the makeup category. And now the brand that put the mineral based formulations on the map—Bare Escentuals—wants a greater share of the skin care market and as such has rolled out a bulked up collection called bareMinerals Skincare. The extensive range is built around the company's RareMinerals Active Soil Complex of macro and micro minerals, and in-

cludes new products like Purely Nourishing Cream and Deep Cleansing Foam and repackaged, existing SKUs including Blemish Therapy and Pure Transformation Night Treatment (formerly known as Skin Revival Treatment), both of which were released in 2007.

While Bare Escentuals is a known entity in the beauty aisle, Solazyme isn't—but that isn't stopping the South San Francisco-based industrial biotech company from jumping into the skin care market with Algenist.

The line is formulated with algaluronic acid, a material Solazyme's scientists unexpectedly discovered after studying thousands of microalgae strains for renewable energy solutions. When researched for potential anti-aging benefits, algaluronic acid demonstrated significant rejuvenating properties, enabling microalgae cells to regenerate and protect themselves in harsh environments and conditions.

"Algae are subject to environmental insults such as harsh UV, desiccation and nutrient deprivation. These are the same environmental insults experienced by our skin," said Tony Day, vice president of research and development.

Solazyme developed a highly reproducible method to cultivate the algae and purify the compound, including fermentation in precisely controlled stainless steel vessels.

"This has two benefits," Day told HAPPI. "Since we are not harvesting from the wild, we are not depleting a resource, and the algaluronic acid produced is highly reproducible each time."

This newcomer has caught the attention of some big names in beauty retail, specifically Sephora and QVC, both of which signed agreements to launch Algenist this spring. The four SKU line—Concentrated Reconstructing Serum, Regenerative Anti-Aging Moisturizer, Regenerative Anti-Aging Moisturizer with SPF 20 and Complete Eye Renewal Balm—is of-



**Artistry has unveiled a new at-home intensive renewing peel that when used twice weekly for six weeks, provides benefits comparable to a professional chemical peel.**

fered on QVC in the U.S. and is stocked in more than 800 Sephora stores in seven countries throughout Europe and in the U.S. There are plans to expand into Asia and the Middle East.

"Sephora and QVC both have reputations for providing some of the most advanced skin care products in the world to consumers. We share their commitment to delivering ground-breaking, high-value innovations and believe it was a natural step for us to team up," said Frederic

Stoekel, general manager, Algenist. "Both also are known for providing excellent information on brands and products to their beauty consumers, so we are confident that they will do an outstanding job in educating consumers on the remarkable benefits of algaluronic acid and Algenist products."

### Moments of Clarity

Wrinkles and lines are key targets in the anti-aging battle, but improving overall skin tone and clarity is a growing message from skin care marketers. Firms are addressing a range of concerns from dark spots to spider veins, all in the quest for the perfect complexion.

Beauty powerhouse Estée Lauder, for example, is rolling new Idealist Even Skintone Illuminator, which is designed for all skin tones—a breakthrough in formulating, according to company executives.

"It was challenging to create a product that was gentle and effective for women of all ethnicities, and also delivered extremely quick results. The fact that we were able to accomplish both with Idealist Even Skintone Illuminator is extremely exciting," said Dr. Nadine Pernodet, executive director of skin biology,



**Estée Lauder's new Idealist Even Skintone Illuminator is designed for all skin tones.**

research and development, Estée Lauder Companies.

Having first identified the different causes of uneven skin tone for different ethnicities, Lauder tapped powerful, yet very gentle ingredients designed to address the key signs of uneven skin tone affecting women of all ethnicities, said Pernodet.

“For example, our Glucosamine-DP molecule blend (Idealist’s signature Glucosamine combined with dimethoxytolyl propylresorcinol), vitamin C and botanical extracts are extremely effective when working together to quickly help reduce the appearance of dark spots, but they are also very gentle to the skin,” she said.

Vichy Laboratoires is hitting the

market this month with its own treatment designed for multiple skin tones. New ProEve Total Dark Spot Corrector contains DeeperCell-Concentrate, which is said to address dark spots and uneven tone that can affect a wide range of skin tones. The concentrate is a combination of vitamins C and E and LHA. In addition, Vichy said the product has a unique texture stemming from micro pearl and titanium, which are designed to deliver a more luminous, radiant complexion instantly with a moisturizing base that provides 24-hour hydration.

Jurlique says its new Purely White Skin Brightening has been shown to even skin tone in just 30 days as it visibly fades dis-

coloration, increases skin firmness and prevents visible signs of aging. Workhorse ingredients include VitabrightTKX, a natural lightening complex that brightens skin without the harmful effects associated with hydroquinone, kojic acid or MAP, according to the company.

Even as marketers crack the code on products designed to safely treat a range of skin tones, there’s been a movement toward more targeted offerings designed to help specific populations.

In an era when a lengthy info sheet touting powerful natural ingredients has become the norm, La Roche-Posay is taking a less-is-more approach with new Toleraine Ultra Intensive Soothing Care, a

## Body of Evidence

From head to toe, and places in between, marketers have their clients’ skin covered. Here is a quick look at recent launches that target skin woes in specific areas.

### Face

• **Palmer’s** is taking its cocoa butter formula expertise from the body to the face with the new Palmer’s Cocoa Butter Formula facial range—its first foray into cocoa butter-based complexion care in the U.S. The range includes a gentle daily cleanser that has exfoliating micro-fine cocoa beans, Night Renewal Cream and Line Smoothing Eye Cream, both of which contain retinol to increase skin’s cell turnover.

Natural marketer **Jason** has rolled out a new anti-wrinkle moisture lotion featuring SPF 30 designed for daily use. It is powered by a Multi-Antioxidant Complex featuring Ester-C—a stable, naturally derived form of vitamin C with powerful antioxidant protection to reduce oxidative stress and help minimize free radical damage to skin cells—and thioctic acid.

### Feet

• **Freeman Bare Foot Repair** is a new range of solution-oriented products designed to keep feet looking (and smelling) their best with formulations that combine powerful active ingredients with natural botanicals and refreshing fragrances.

The range includes Repair for Pain Relief, a blend including camphor and menthol which provides cooling relief from minor aches and muscle pains; Repair for Cracked Heels, an intense daily treatment that repairs damaged tissue and rebuilds skin’s protective layers; Repair for Callus Softening, a lotion designed to reduce dry skin build-up and hydrate; and Repair Deodorizing Foot Spray, which reportedly delivers dryness and odor protection all-day by way of talc and neem oil.

### Eyes

• **Scientific by Kenneth Beer** has rolled out a new eye cream, EyeSculpt, which marks the third product in the brand’s skin sculpting range. The formulation contains Spilanthes Acmella and squalane to help lift, firm and tighten the delicate skin around the eyes.

### Neck & Décolleté

• When it comes to a completely youthful look, the neck and chest area can make-it-or-break-it—think beautiful flowers in an ugly vase. **Dr. Hauschka** is taking on this specific area of the body with its new Regenerating Neck & Décolleté. The formulation features extracts of moisture-balancing marsh mallow and birch leaves combined with isoflavone-rich red clover and plant oils like macadamia nut and argan. In addition, field horsetail fortifies and helps firm for a visibly smoother appearance.

### Hands

• **Nature’s Gate** has updated its hand lotions to reflect advances in natural ingredients. Offering 10 quick-absorbing, fast-acting PEG- and butylene glycol-free formulas that address each and every skin care need, these improved lotions deliver even more moisture boosting, skin protecting power from their unique blend of Seven Natural Moisture Boosters. The lotions contain seven herbs, oils and nourishing botanicals—sodium hyaluronate, vegetable glycerin, shea butter, sweet almond oil, vitamin E, apricot kernel oil and soybean oil—in an exclusive blend.



daily moisturizer and calming agent designed for ultra-intolerant and/or allergy-prone skin. Billed as the first daily moisturizer with zero percent preservatives, zero percent parabens/fragrance, zero percent alcohol/colorants and zero percent lanolin, the formulation contains Neurosensine, a calming agent to help reduce signs of skin reactivity immediately upon application.

Dermelect Cosmeceuticals is taking on another specific condition with its new Vacial Spider Vein Treatment. Designed to address broken capillaries around the cheeks and nose, it can also be used on spider veins on the legs and body.

Vacial's key ingredients include grape seed extract, horse chestnut and phytononine (vitamin K), which contains extracts of arnica, cypress and Solomon's Seal, all essential for microcirculation and the strengthening of vein walls. Application of phytononine for 3 weeks resulted in a 24% decline in the redness of the affected area and a 25% reduction of extravascular blood flow, helping to improve the appearance of redness and broken capillaries.

According to Dermelect founder Amos Lavian, the initial formulation was created for the legs, but during testing, study participants tried it on their faces. After their positive experience, Dermelect researchers took a closer look.

"We had to play with the pH levels on the product," Lavian told HAPPI, noting that after reviewing the formulation with an allergist on the company's board, Dermelect opted to keep it as a single product that



**La Roche-Posay's Toleriane Ultra Intensive Soothing Care is a daily moisturizer and calming agent for ultra-intolerant or allergy-prone skin.**

would increase microcirculation and restore moisture levels on both areas rather than split it into two SKUs.

Lavian's firm recently added Redness Rehab Rosacea Relief, which contains alleviating and calming ingredients that allow skin to adjust to the reactive redness of rosacea while responding to the aggressors. It contains natural skin brightener Emblica, as well as green tea and shea butter and the anti-inflammatory ingredient Phytosphingosine.

According to Lavian, multifunctional products are what consumers want, not a vanity full of individual treatments.

"It saves money and saves them time," he said. "We are trying to take the clutter out of cosmeceuticals."

### What Do They Want?

That's the million-dollar question in skin care—and it appears consumers are willing to experiment on both ends of the pricing spectrum. In mass, sales of private label facial anti-aging skin care products rose an impressive 25% over last year, while prestige skin care sales continue to fare well too. According to a recent CNN online report, Saks Fifth Avenue had to limit the number of products customers could buy when LaPrairie launched Cellular Power Infusion, its über lux treatment that rolled out in February; a supply of four 0.26oz. vials retails for \$475.

Interestingly, the prestige skin care market seemed to pick up speed as price points for some mass products began to tick upward. Some experts suggested that the "pragmatic luxury" trend may have persuaded consumers that a prestige product with its professional consultation as a great value when compared to the more expensive mass market anti-aging products that were stocked alongside everyday moisturizers.

For example, Neutrogena Clinical hit the marketplace at \$40, which is not much

cheaper than the \$49.50 entry level price point for Clinique's Even Better Clinical Dark Spot Corrector, which was the No. 1 item in the prestige skin care market last year, according to NPD.

The blurring of prestige and mass isn't putting the squeeze on dermatologists' business. According to Kline & Company, a rise in visits to professional outlets for skin care treatments in 2010 gave way to sales growth for the global professional skin care products market, with most of the leading professional skin care companies posting respectable sales gains in 2010. Brands from medical care providers registered the strongest growth, with SkinMedica and SkinCeuticals posting double-digit gains and market leader Obagi maintaining its leading position in the U.S. market, with a 13% sales gain for the year, according to Kline.

It is all about finding what works, according to experts and industry observers alike.

"The at-home skin care user has become more savvy over the last few years. They are looking for skin care products that 'work' and because of the financial turmoil everyone has been enduring, she wants the skin care line to have a lower price yet deliver what she is expecting," said Dr. Byeong Deog Park, chief executive officer of Neopharm Co. Ltd., which touts Atopalm, a skin care range that features a patented multi lamellar emulsion system that mimics skin's mixture of ceramides, cholesterol and fatty acids.

"The USA skin care consumer wants something that they feel works faster, lasts longer, and costs less; and yet, has a 'premium feel,'" Park said.

A long list to be sure, but there's more to achieving success in the skin care market than a great formulation.

"Overall, those who are resonating the strongest with consumers are leveraging more than the ingredients," said Grant of NPD. "They are focusing on the relationship. At the end of the day, everyone can offer great ingredient and great technology. It comes to down to how much consumers can trust the brand." •