



# Trends-In-Sight: U.S. Skincare - An Active Market

By Amy Marks-McGee

According to Mintel, a Chicago, USA-based market research firm, the U.S. facial skincare category grew 11% to reach sales of approximately \$5.6 billion between 2007 and 2012 while body care sales reached \$2.5 billion and declined by 10% from 2007 to 2012. The U.S. prestige skincare market grew 3% in the 12 months ending January 2014, reaching \$3.6 billion in sales according to The NPD Group of Port Washington, NY. Additionally, The NPD Group reported that facial products brought in \$2.8 billion, representing 78% of the business and two-thirds of the new dollars gained in the total market during this time period.

The U.S. skincare market is crowded with many brands jockeying for position. Facial skincare is a concentrated market being driven by ingredients and technology. Anti-aging is a key message and consumers' hectic lifestyles demand instant results. Texture and application are important characteristics of skincare products and in response, manufacturers have been creating lightweight, non-greasy and quick absorbing formulas for better performance and aesthetics. Spray-on body lotion and powder formulas are the newest skincare applications. The acne, sun care and men's segments have been active. To diversify, skincare brands have been branching out and creating line extensions such as fine fragrances.

## Ingredient Story

The facial skincare market is saturated with so many products on shelves, many with a focus on anti-aging and targeted solutions to problem areas. In this competitive landscape, brand owners must distinguish their brands in ways that resonate with consumers, and ingredient stories led by technology are a popular method. The application and texture of products also contribute to the customer's experience.

Here are just a few of the many examples of recent U.S. product launches centered on ingredient stories. La Prairie's newest introduction is the Cellular Swiss Ice Crystal collection available in Cream and Dry Oil. Formulated with a Swiss Ice Crystal Complex made from the DNA of three Swiss Alps' plants - Soldanella Alpine, Swiss Snow Algae and Purple Saxifrage - it's said to "help skin protect itself from the visible signs of accelerated aging." Sold exclusively at Sephora, Givenchy's Hydra Sparkling One-Minute Glow Powder highlights Givenchy Sparkling Water Complex®, alpha and beta hydroxy acids, microcrystals and Allantoin. Olay Fresh Effects {Dew Over!} Hydrating Gel Moisturizer is an oil-free lightweight moisturizing gel, which uses a powder-infused formula with the essence of

honeysuckle and white tea. Exuviance Vitamin C+ Antiaging Booster contains a "100% active powder formula with patented Aceta-C™" and the unique powder application can be applied to the consumers' own moisturizer or serum. Aveeno Positively Radiant Targeted Tone Corrector joins the Radiant line and is based on the Active Naturals Total Soy Complex to "help reduce the look of stubborn dark spots, discolorations, and uneven tone to improve skin's radiance" while Olay Regenerist Luminous Collection features a skin energizing complex, which "renews surface cells to even skin tone and reduce the appearance of dark spots." Neutrogena's new Triple Age Repair™ Night Moisturizer "targets the 3 skin issues that age you most" and is made with HEXINOL® technology and vitamin C that are believed to help smooth the look of wrinkles, even skin tone, and restore skin's resilience. Estée Lauder introduced the Revitalizing Supreme Global Anti-Aging Crème with a new breakthrough IntuiGen Technology™ that "specifically addresses your unique anti-aging needs all at once."

## Blurred Lines

As a society we are time crunched with hectic schedules, often juggling work and family. Technology has made us available 24/7 and consumers are living in a time of instant information and gratification. Impatient consumers want immediate results and brands are trying to deliver products that show benefits quickly. "Blur" is the en vogue marketing buzzword in facial products meant to reduce signs of aging such as wrinkles and lines. Garnier Skin Renew 5 Sec Blur Instant Smoother "is designed to instantly blur the visible signs of aging including: wrinkles, fine lines, flaws and visible pores." Lancome Visionnaire 1 Minute Blur offers a "lightweight, oil-free skin-finisher that in just 60 seconds reduces the appearance of wrinkles and fine lines" formulated with Photo Smooth™ optical technology. L'Oreal's Miracle Blur Instant Eye Smoother claims to "instantly erase the look of crow's feet, lines and bags while working to correct dark circles and signs of aging around the delicate eye area over time." Kiehl's Micro-Blur Skin Perfector with lipo hydroxy acid, bark and lentil extracts states the product "instantly diminishes the appearance of pores and refines skin texture."

## Acne Attention

According to the American Academy of Dermatology, about 40 to 50 million Americans are affected by acne, most commonly teenagers. According to IRI, a Chicago, USA-based market research firm,

acne treatment sales approached \$640 million in food, drug and mass merchandisers for the 52 weeks ending December 30, 2012. Charcoal as an ingredient to purify clogged pores is appearing in recent launches. For example, Biore launched Deep Pore Charcoal Cleanser and Self Heating One Minute Mask with natural Charcoal while Garnier offers Clean Blackhead Eliminating Scrub with charcoal and salicylic acid and Shine Control Cleansing Gel. Murad added two new acne products to its line. For the first time in Murad's history, Acne Spot Fast Fix uses benzoyl peroxide (BPO) delivered in a hydrophase system without causing irritation while Acne Clearing Solution contains salicylic acid, queen of meadow extract, a vitamin blend, retinol and tea tree oil. Estée Lauder debuted Clear Difference, a new line of adult products targeted to fight blemishes and breakouts. The "grown-up solution to blemishes" includes Advanced Blemish Serum, Targeted Blemish Treatment and Complexion Perfecting BB Creme. According to the company, the products are formulated with an exclusive triple action clarity technology that includes salicylic acid, Glucosamine and a marine extract. PocketDerm is a new online dermatologist website that is membership based and includes consultations, products and shipping. For \$29.95 per month, customers complete a questionnaire and upload photos and a dermatologist creates a custom-tailored acne treatment containing prescription based ingredients that are then delivered. Not specific to acne, a mentionable new product is MedermaPM, which is designed to reduce the appearance of scars both old and new. Meant to be used at night, the product claims it "works while you sleep, when skin regenerates faster."

## Oil Strike

As explored in Trendincite's "Trends-In-Sight: U.S. Hair Care Market Developments" article, which appeared in the 4<sup>th</sup> 2014 issue of Eurocosmetics, the use of oil is spilling over into skincare, including sun care. Jergens Shea Beauty Oil blends shea butter and argan oil and is said to offer "6x more radiance, sheen and hydration." Suave Professionals Moroccan Infusion Body Care is offered in a non-greasy Body Lotion and Dry Body Oil Spray. Natural brand Once Love Organics introduced Elizabeth Dehn for One Love Organics Vitamin C Body Oil, which features facial-grade ingredients blended specifically for the body. It is formulated with vitamin C ester, papaya enzymes and organic shea oil. L'Oreal recently introduced the Age Perfect Glow Renewal facial line with a focus on oil to nourish the skin. The Facial Oil features "the power of 8 essential oils" while the SPF 30 Lotion is "infused with 5 essential oils." Garnier Clean Smoothing Cream Cleanser and Nourishing Cleansing Oil include jojoba and macadamia oil. Palmer's Cocoa Butter Formula added Skin Therapy Oil - Face made with oils of sweet almond, sesame, coconut, macadamia nut, apricot, grapeseed, argan, rosehip, camelina and sunflower to its line.

Once frowned upon, oil has now moved back into sun care. L'Oreal's Invisible Protect Dry Oil Spray 30 and Sublime Sun

Advanced Sunscreen Oil Spray SPF 15 contain oils of argan, shea butter, grapeseed and sunflower as well as vitamin E. Clarins Laboratories SPF 30 Dry Oil Spray is formulated with organic Indonesian Nyamplung oil, senna extract, Plane tree extract and aloe vera while Supergoop! Sun-Defying Sunscreen Oil Broad Spectrum SPF 50 features meadowfoam and argan oils.

## Let the Sun Shine In

Aware that anti-aging is a key focus for consumers and sun protection helps prevent lines, wrinkles and dark spots, sun care brands are improving the performance and aesthetics of their formulas and offering skincare benefits. Consumers dislike the texture of sunscreen. According to the results of L'Oreal and Melanoma Research Alliance's *It's THAT Worth It™ Safe Sun Survey* women's dislike of using sunscreen has significantly increased from last year with more women citing texture (15% vs. 7% in 2013) as not enjoyable. Additionally, the results showed that significantly more Hispanic women (12% vs. 5%) admit they don't like the way most sunscreens make their skin look.

Peter Thomas Roth Anti-Aging Defense Sunscreen Stick SPF 50 is an oil-free sun cream that "helps prevent sunburn, spots, and discoloration as it reduces the sun's harmful effects on skin." Coppertone introduced ClearlySheer, a new range of lotions and sprays in two variants - For Sunny Days and For Beach & Pool. With a tagline of "Face-Friendly, Barely Noticeable" these sunscreens are lightweight formulas said to not clog pores or cause breakouts. L'Oreal added two new products to its Advanced Suncare range - Advanced Suncare Silky Sheer BB Face Lotion and Advanced Suncare Quick Dry Sheer Finishing Spray. The Silky Sheer BB Face Lotion is the "first-ever BB facial broad spectrum sunscreen" with a patented UVA/UVB filter and the Quick Dry Sheer Finishing Spray is "an ultra-lightweight, liquid silk lotion that comes in a first-to-mass alcohol-free aerosol spray form." Hawaiian Tropic introduced Sheer Touch Ultra Radiance lotion sunscreen that "offers triple enhancement for radiant skin: protects, softens, and leaves skin glowing" infused with a shea butter complex and mango fruit extract.

## Spray It On

A common complaint for body lotion users is that lotion is heavy and it takes too long to absorb into the skin. Addressing these issues, the newest application is spray-on body lotion, based on technology borrowed from the sun care category. In 2013, under the Vaseline brand, Unilever introduced Spray & Go in three variants - Aloe Fresh, Cocoa Radiant and Total Moisture. This year, the brand adds Vaseline Men Spray Lotion in Fast Absorbing and Fast Cooling varieties. According to the company, the products "moisturize deeply and absorb in seconds to help heal dry skin." St. Ives Fresh Hydration Continuous Mist Lotions also launched in 2013 with the "We took the heavy out of lotion" tagline. The lotions are available in three

scents - Energizing Citrus & Vitamin C with grapefruit extract, Naturally Indulgent Coconut Milk & Orchid Extract, and Naturally Soothing Oatmeal & Shea Butter. Although not a spray-on lotion, a notable new product is Jergens BB Body Perfecting Skin Cream. Borrowing from the facial segment, the body lotion goes on sheer, dries quickly and works like a moisturizer. The company claims the product delivers 5 visible benefits, it “hydrates, illuminates, evens, firms and corrects.” Expect to see other brands follow suit in both spray-on applications and BB body creams.

## Men at Work

The men's grooming segment continues to be active with several new launches targeted to meet men's specific skincare needs. Clinique for Men added several new products to its line up including Anti-Aging Moisturizer, Moisturizing Lotion, Oil Control Face Wash and Oil Control Mattifying Moisturizer. Kiehl's Men's new product range highlights oil elimination and is offered in three applications - Oil Eliminator Deep Cleansing Exfoliating Face Wash, Men's Oil Eliminator 24 Hour Anti-Shine Moisturizer and Men's Oil Eliminator Refreshing Shine Control Spray Toner. Gold Bond introduced Ultimate Men's Essentials Lotion and Cream with seven moisturizers and skin-strengthening proteins and minerals formulated with ceramides and peptides for the body, hands, and even face. Banana Boat Triple Defense Sunscreens available in SPF 30 and SPF 50 as Lotion and Clear Spray are formulated specifically for men to “provide the heavy-duty broad spectrum protection that men need while also combating odor and hydrating skin.”

## Branching Out

Skincare brands have been extending their lines with fine fragrance introductions based on popular scents in their skincare

products. Known for the use of vines and grapes, Caudalie added Parfum Divin, a fragrance inspired by their Huile Divine body oil, to its collection. Cult 51, a luxury skincare line, launched Cult 51 perfume, which is described as a white floral and was based on the scent of the brand's night cream. Home fragrance and personal fragrance brand Diptyque entered the facial care market with the launch of Art du Soin for the Face, a range of five SKUs based on plant and flower distillations. MoroccanOil, the well known hair care brand, launched the luxurious body collection in 2012. Last year it debuted a MoroccanOil candle to capture its signature scent.

## Skin Deep

As a culture, the U.S. continually searches for eternal youth and manufacturers and formulators alike, look to ingredients and technology to address anti-aging concerns and meet the growing demand for fast results. Manufacturers will continue to strive for better performance and aesthetics with a focus on lightweight, non-greasy and quick absorbing formulas and new applications such as dry oil sprays, spray-on body lotions and BB creams for the body. Targeted products for acne, sun care and men will continue to be developed to meet the needs of each specific category while skincare brands will branch out to offer alternative products. Watch as the skincare category continues to grow. ■



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