



Intelligence in time

Anti-Ageing Skincare

In-Cosmetics Milan, 2011

Agenda

- Predictive trends
- The market
- Consumer top concerns about ageing
- What manufacturers are launching
 - Ingredients
 - Innovative concepts
 - New claims
 - High tech actives
 - Anti-ageing devices
- Looking ahead

2011 Prestige Beauty Trends Summary

- *High tech*: evolution of sophisticated technology in beauty gadgets and formulations that capitalise on advances in gene therapy and professional treatments; advanced anti-ageing actives such as newer peptides, stem cells and epidermal growth factors
- *Down to Earth*: focuses on the practical aspects of green beauty and sustainability; looks at minimal packaging, straightforward stories, evolution of 'free-from' claims, and treating consumers as educated collaborators

The anti-ageing facial skincare market

- Despite economic pressures on consumers, the facial skincare market continued to grow in 2010, and anti-ageing skincare was the most dynamic sector
- Europe was the largest anti-ageing skincare market in 2010, with sales of €2.4bn in the Big 5
- The US was close behind, with mass market sales alone of \$804m.
- However, growth is slowing and manufacturers will have to shift the focus of their NPD to account for changing demographics.

Consumers are getting older

- The number of 35-44 year olds is falling
- In contrast, the number 55-64 year olds will grow 31% in the US, while the 65-74 year old group will increase by 31%
- A similar situation will emerge in Western Europe by 2013.
- France will have 2% more 45-54s, 8.5% more 55-64s and 9.3% more over 65s.
- In Germany, for example, there will be 14% more 55-64 year olds and 2.3% more people aged 65+
- In Italy, there will be 12.1% more 45-54 year olds, 4% more 55-64s and 6% more over-65s.
- In the UK, where the number of 45-54s will rise 10%, 55-64s will fall 0.8% and the over-65s will grow 9.8%.
- Only Spain will see more 35-44s (+8%), as well as 13.6% more 45-54s and 9.5% more people aged over 55

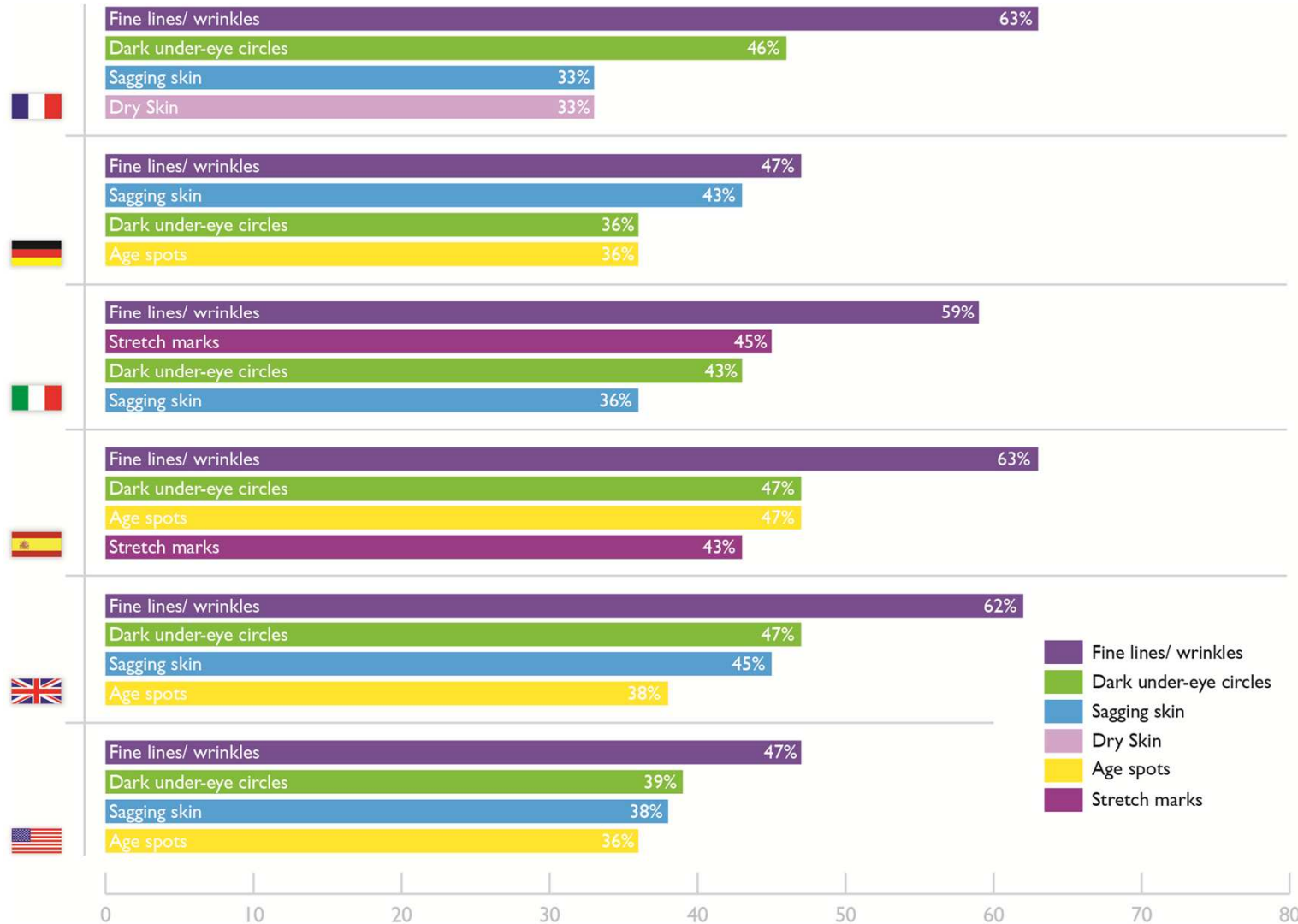
A changing consumer landscape

- Improved diets and healthcare have increased the average lifespan, despite the increase in obesity
- The economic recession has put pressure on national pension schemes, so people are working longer
- Rising unemployment has intensified competition for jobs
- People are more concerned than ever to look good for their age

Consumer concerns

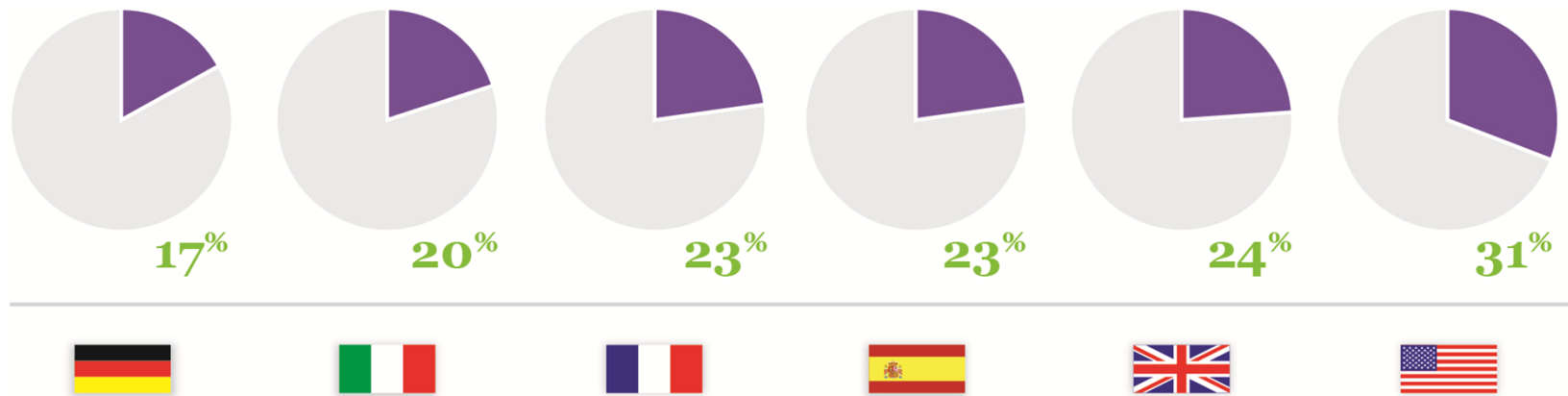
- Fine lines/wrinkles are the top anti-ageing concern
- Almost 2/3 of French women use anti-wrinkle products
- Last year, USA had the highest percentage of women who are NOT concerned with ageing (24%). This year, the level has fallen back to just 15%

Consumer concerns



Hope in a jar?

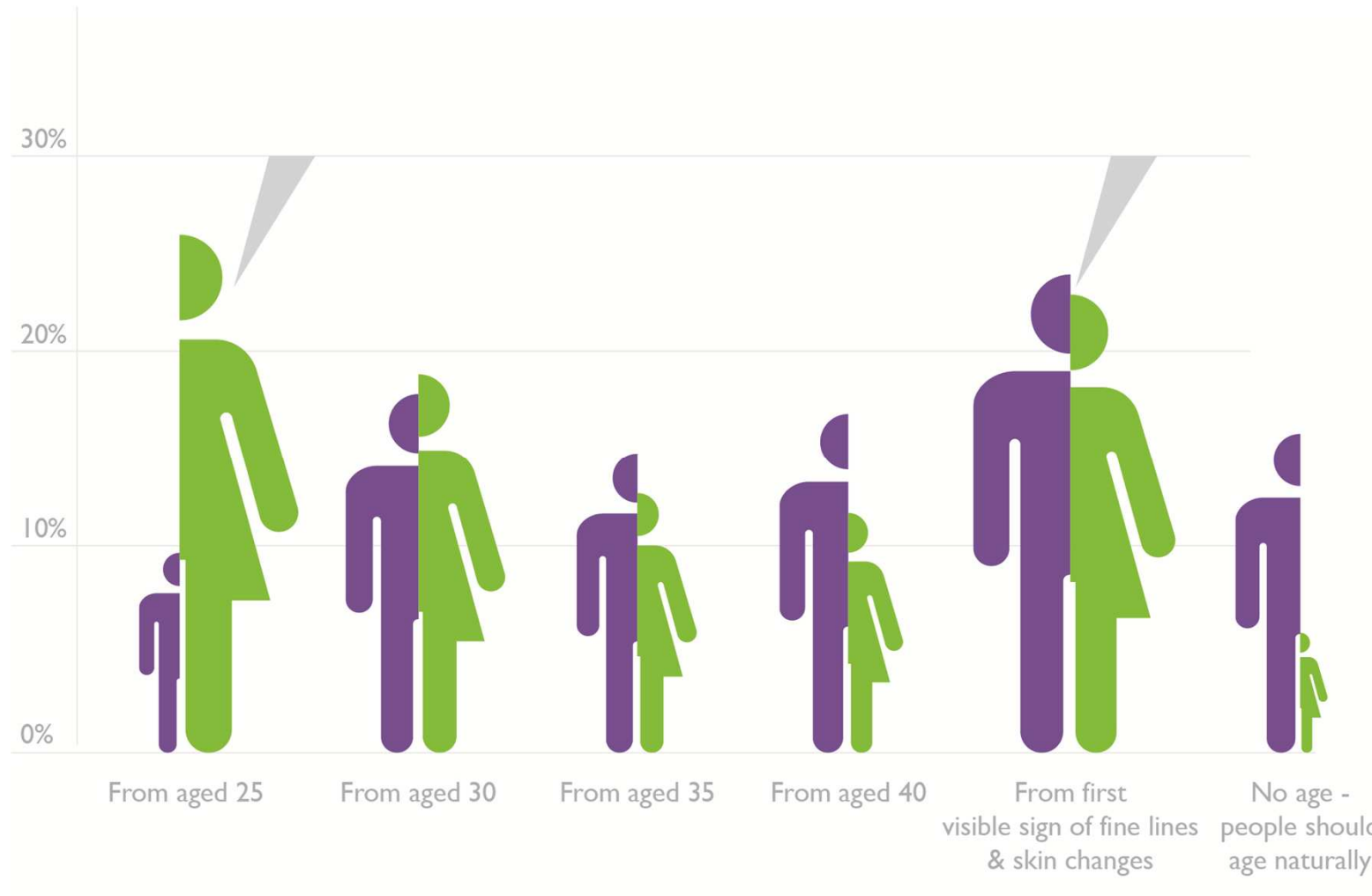
“I'm not sure how well anti-ageing products actually work, but I continue using them...”



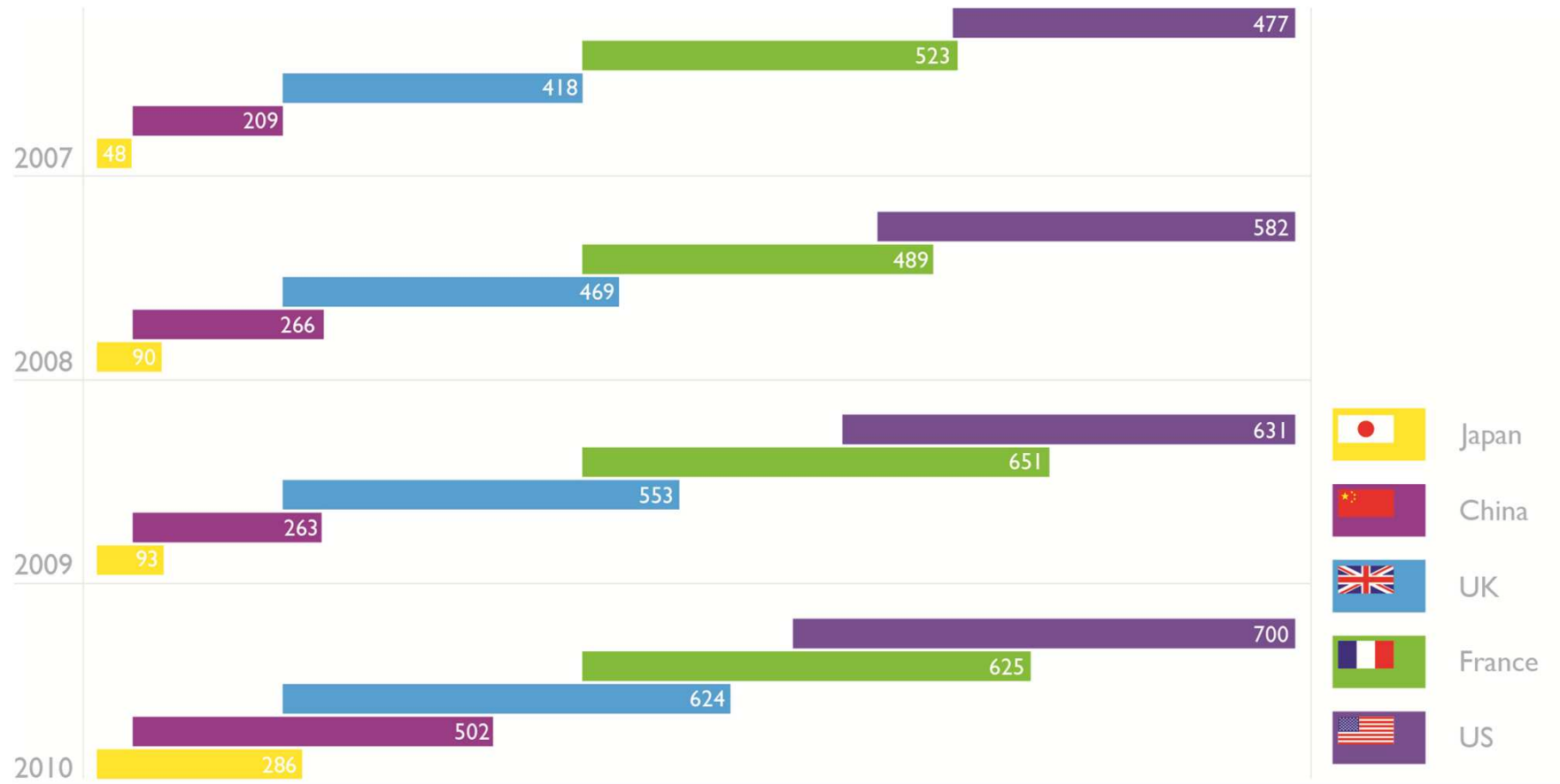
Top 10 claims by country – Prestige over \$25 products



Ageing concern starts early in the US



Anti-ageing launches have multiplied since 2007





Intelligence in time



High tech skincare

Making use of the latest scientific discoveries and professional applications

High Tech Skincare

- Sirtuins
- Fullerenes
- SOD
- Human Oligopeptide-1 (EGF)
- NGF (Nerve Growth Factor)
- Animal derived placenta/ collagen
- Stem cells
- Neuro Skin Theory
- Anti-ageing devices used in skincare and for home laser technology

Interesting naturals

pH Advantage Pyranase Anti-Aging Cream

\$89.50

Said to be clinically proven to help reduce the visible signs of ageing, diminish facial redness, and reduce erythema

Claimed to clarify and brighten the skin tone, smooth the skin's texture and increase its moisture content

Formulated with patented cytokinin, a naturally occurring plant growth factor said to have anti-senescence properties.



w/patented cytokinin (a naturally occurring plant growth factor); only product in GNPD to contain furfuryl tetrahydropyranyladenine

Scurvy grass, red sandspurry and sleepy morning



Clarins Capital Lumière

€81.45

Patent pending day cream with anti-ageing, firming and evening properties

Contains cochlearia officinalis (scurvy grass), which is rich in vitamin C and has antiseptic and repairing properties, helping to eliminate the skin's old oxidised intracellular proteins and protect its collagen fibres from oxidation. Spargularia (red sandspurry reduces the age-related enzyme production that leads to hyper-pigmentation, while waltheria (sleepy morning) delivers antiseptic and antioxidant action, and stimulates collagen production



With three new brightening plant extracts
- Cochlearia officinalis, Waltheria and Spargularia

Paracress for anti-wrinkle effects



Cosmetics à la Carte Hydra Smooth Anti-Wrinkle Cream

£35

The vegetarian-friendly product is made using carefully selected ingredients balancing technology, safety and comfort with minimal preservatives

Product is enriched with peptides to stimulate collagen production and plump skin, while acmella oleracea extract minimises facial muscle contractions for younger looking skin

skincare from niche UK made-to-measure cosmetics brand; free from; with acmella oleracea (spilanthes/paracress) which has anti-wrinkle effects

Topical collagen



Fancl Beauty Concentrate

JPY6000/€55.88

A new formula with the brand's original patent-pending ingredient, High-Absorbing Silybin (milk thistle), which is combined with the brand's original HTC Collagen to boost the cycle of discharging and producing collagen, leaving skin firm, plump and luminous.

The serum is also enriched with an array of moisturising ingredients, including hop extract and macadamia nut oil, and promises to create a translucent complexion.



Ex:beaute Extrage Cream

JPY 7980/€70.94

Ex:beaute Extrage Cream is formulated with six types of collagen, six types of hyaluronic acid and six vitamins enhance elasticity, moisturise and condition the skin.

It is enriched with horse chestnut extract to strengthen skin's structure, leaving it plump and resilient.

Masks



Impress Concentrate Mask 3D

CNY 720/€81.90

Impress Concentrate Mask 3D with double hyaluronic acid is said to envelop the entire face.

Contains the same amount of ingredients as one bottle of anti-ageing serum, promising to instantly display resilience, clarity, translucency and firmness, and improve the appearance of dullness, roughness and fine wrinkles, while protecting skin from environmental pollution.



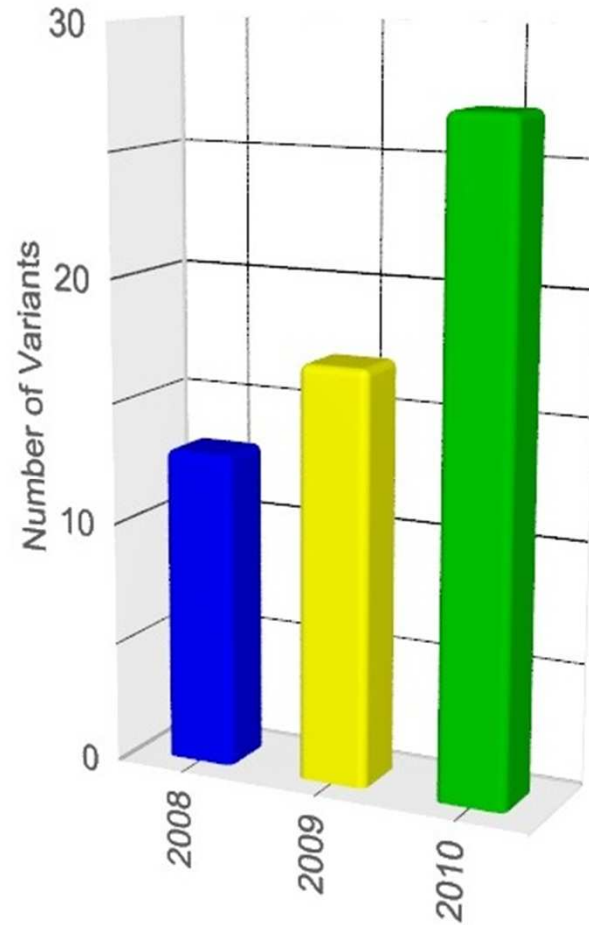
Pura Vita C Dual Mask

HK\$ 150/€14.53

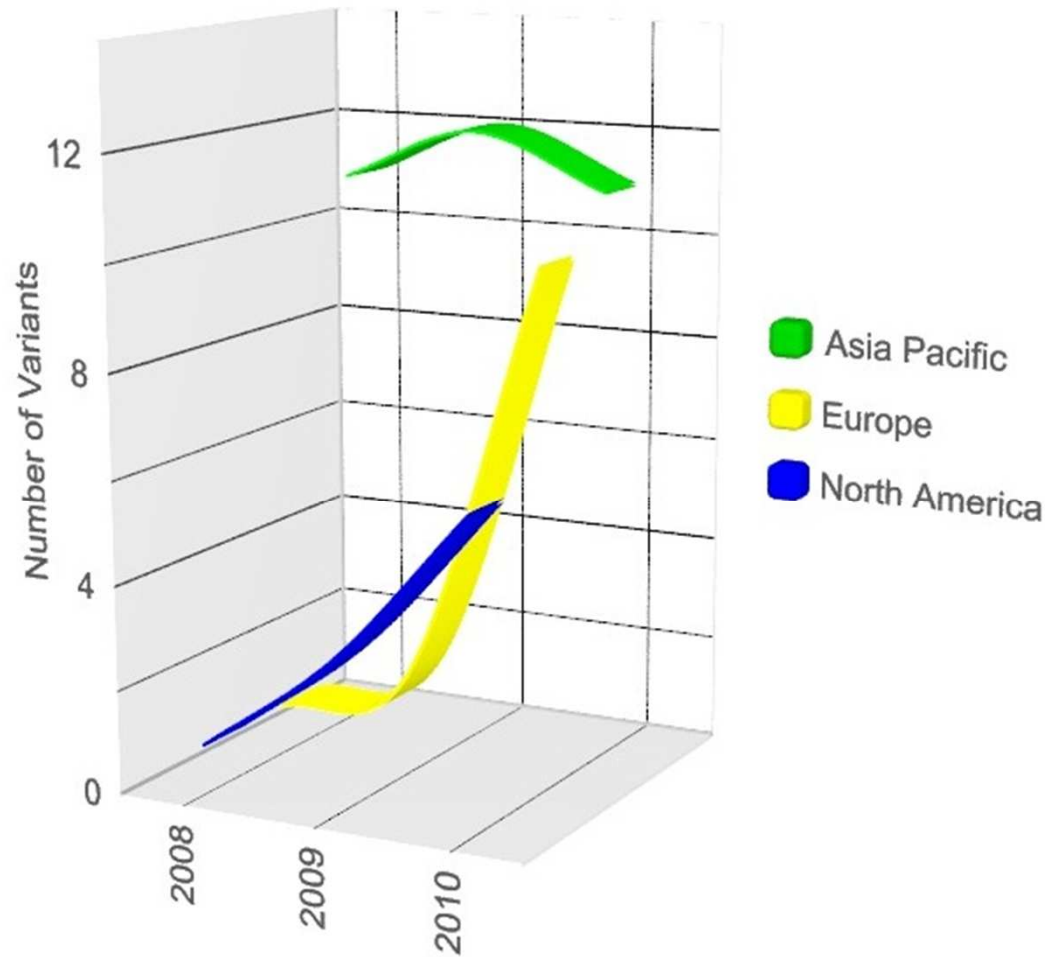
Rojukiss Pure Vita C Dual Mask combines vitamin C powder with a mask sheet with essence, which have been packed separately to avoid oxidation.

Mixed before use, the product is said to help improve skin tone and fight the signs of ageing with co-enzyme Q10. Penetrates deep into the skin and replenishes collagen.

EGF is a growing factor in anti-ageing formulations



Asia maintains its lead in EGF launches



EGF

DHC EGF Cream

\$89

Moisturiser said to combat the appearance of wrinkles and loss of elasticity, and to revitalise the skin.

The product features the technologically advanced polypeptide EGF, as well as age-fighting vitamins, minerals and amino acids to nourish mature skin, encourage cell turnover, and enhance elasticity and radiance





Shiseido Urara Multi-Vitalizing Emulsion (II)

CNY 200/\$30.18

Specially formulated for Chinese women, it contains a triple amino acid multi-repairing complex of ingredients to moisturise, whiten and revitalise skin, and to promote collagen production. It is said to effectively improve dryness, dullness and the appearance of wrinkles whilst protecting skin against environmental elements for a youthful, radiant, translucent and elastic finish.

Contains an EGF active ingredient, claimed to tighten, smooth and firm the skin

EGF with gold



Petitfée Gold & EGF Eye & Spot Patch

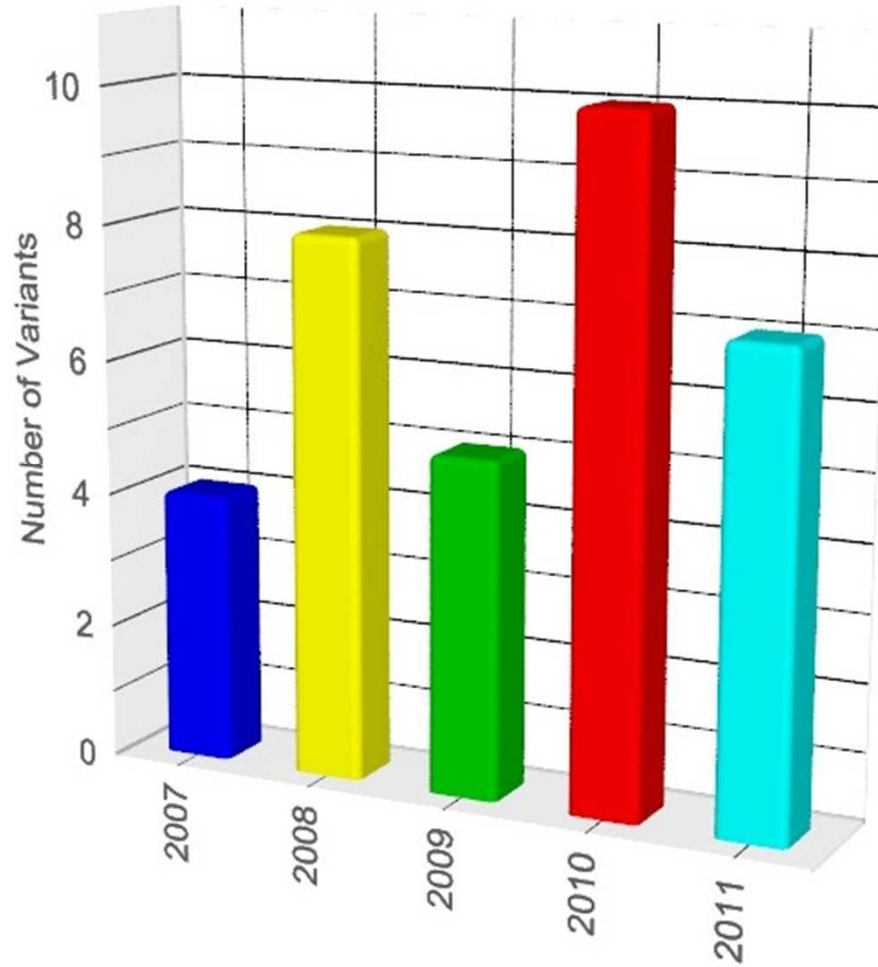
SKW 24000/€15.68



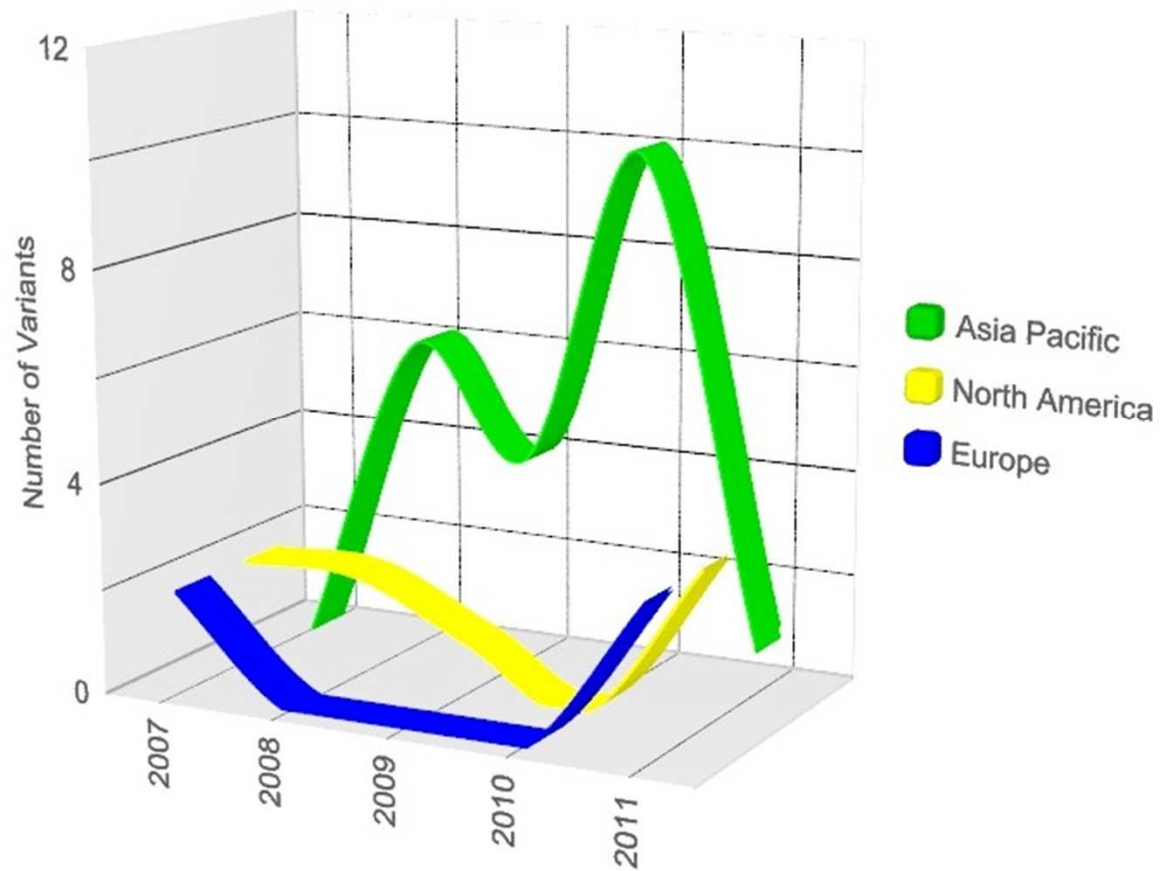
Infused with moisturisers, gold and vital ingredients to give parched skin intensive hydration and improve elasticity. Promises a dramatic firming and cooling effect that resembles a professional spa treatment. The skin is said to be left with a healthy glow.

The pack contains 60 x Eye Patch, and 30 x Spot Patch.

Fullerenes are back



Europe and North America overtake Asia in fullerene launches



Fullerenes and EGF



w/fullerenes, EGF and SOD; lots of PR buzz in UK for this launch, said to unlock the secret of Japanese youthful skin

Shinso Skincare

\$350

Formulated with 69 Japanese herbs; grapefruit peel, honey, olea europea leaf extract, morus alba root extract and pueraria mirifica root extract to revitalise skin, as well as anti-free radical SOD, fullerenes to exfoliate the skin in order to generate plumper, healthier skin cells, EGF to increase skin cell regeneration, and argireline, a peptide that reduces the appearance of fine lines and wrinkles

Product claims to boost collagen production leave the eyelid and eyebrow looking lifted, the side of face tightened, firmed and toned, and the jawline more defined. Also for use on the body

New range with horse-derived placenta, fullerene, 3GF

Esthe Pro Labo Outer Ageing Care Program Thoroughbred Placenta

JPY10500 / \$124

New skincare range with moisturising horse-derived placenta

The products contain domestically produced thoroughbred placenta to provide anti-ageing care for a translucent complexion

Free from synthetic fragrance, synthetic colourants, parabens, alcohol, mineral oil, petroleum surfactant and antioxidants.

The product also contains fullerene, 3GF, alpha-arbutin, hyaluronic acid, AG-11 and 18 herbs



Neuro Skin Theory



Clé de Peau Beauté Gentle Protective Emulsion

JPY11025 / €98.41

Features Neuro Skin Theory, asserting that the skin has the ability to think and process information like a brain

Contains moisturising Illuminating Complex (hydrolysed silk protein, hydrolysed conchiolin protein and glycerin), to create radiance by improving the structure of the corneocytes, blocking cellular stress and controlling cell turnover



Clé de Peau Beauté The Cream

JPY52500 / €468.61

Quasi drug cosmetic with active ingredients to suppress melanin formation and prevent the appearance of dark spots for a luminous, look.

Described as a high-performance product, the rich night cream instantly provides moisture and delivers age-defying benefits with an elegant natural rose and rare orchid scent. It soothes rough, dry skin lacking elasticity, making it firm, plump and hydrated during sleep

Neurocosmetic defence mechanism



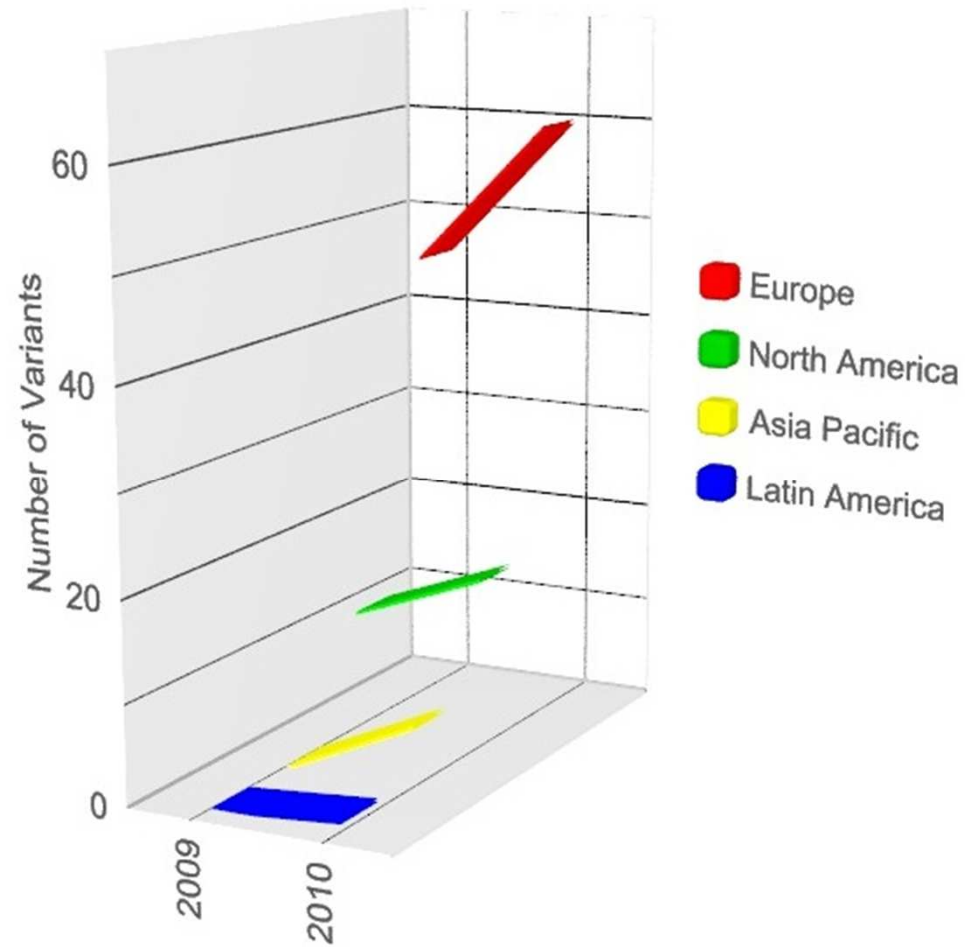
Intensive Tolerance Booster

£209.50 / €249.17

A multi-defence repairing serum said to reinforce the skin's natural barrier while soothing and deeply moisturising skin damaged by hormonal changes or aesthetic or oncology treatments

Contains fermentus glaciarius extract to provide anti-wrinkle benefits and reshape the facial contours, while enhancing the formation of elastin. Also features two types of collagen, a red algae extract to neutralise the release of specific inflammatory mediators, 20% of pro-tolerance peptide complex to modulate the activity of metalloproteinases while preventing premature ageing, restoring the levels of young collagen and repairing and strengthening the skin's self defence system

Stem cells take off in Europe



Apple stem cell

Rhonda Allison Body Nude Therapies Bio Reform 28 Age Reversal Complex

\$89

Reformulated with organic stem technology. Contains glycine soya protein to improve the skin's suppleness and to refine fine lines, palmitoyl oligopeptide to enhance collagen and GAG production, palmitoyl tetrapeptide-7 and algae extract to improve tissue elasticity and stimulate collagen production, glucosamine HCl to firm the skin, yeast to encourage the production of collagen IV and VII, apple stem cell to inhibit elastase and maintain healthy elastin, and EGF to promote tissue growth

The brand's products are said to be environmentally friendly whenever possible



reformulated with plant extracts, apple stem cell + EGF and other peptides

Stem cells from other sources



QMS Cellular Alpine Anti-Aging Eye Care

€122

Contains alpine rose stem cells, which is claimed to protect the sensitive eye area, enhance the stimulation of new skin cells, increase skin stem cell vitality, and improve skin's metabolism.

The formula is claimed to noticeably rejuvenate the skin, reducing fine lines and wrinkles and protecting from premature ageing and further wrinkle formation.



Chantecaille Biodynamic Lifting Neck Cream

€122

Features a unique combination of six patented ingredients specially developed to target the neck area and strengthen fragile, mature skin by restoring cell function. Contains raspberry stem cell extract and Anti-Wrinkle Hexapeptide Technology, brightening watercress and marsh samphire, and a calcium booster. The plant stem cells are said to immediately increase the antioxidant function in human DNA and repair the signs of ageing. Inhibits melanin production by up to 55%.

Parthenogenetic stem cells

Lifeline Defensive Day Moisture Serum SPF 15

\$160

Manufacturer is owned by International Stem Cell Corporation, which has developed a multistep process extracting proteins from parthenogenetic stem cells, encapsulating the proteins inside nanospheres and adding them to antioxidants, moisturisers, vitamins and minerals.

The serum is said to help rescue facial skin from the signs of ageing. It uses a patented non-embryonic stem cell extract, claimed to nurture collagen and fibroblasts, as well as containing sun-protection factors to shield the skin from the harmful effects of the sun. It is said to leave skin firmer, smoother, younger-looking and better-protected.



Relaunch with stem cell to stimulate NGF (Nerve Growth Factor)

Dior Capture Totale Skin Boosting Super Serum

€111

Features a new synergy of TP Vityl to protect the stem cells, while Longoza-Cellular Complex preserves the skin's condition, targets stem cells and regenerates youthfulness. Product uses stem cells to stimulate NGF, which in turn promotes the production of collagen or hyaluronic acid via dermal fibroblasts

Contains centuline to stimulate cell longevity, sirtuins and aminolumine to ensure the deoxidation of proteins, and algae extract detoxinyl to activate an enzyme known to transform toxins into new proteins and initiate long lasting cutaneous growth.



Dior has added stem cell + growth factor terminology to the product's original detox concept

Super luxe from beverage company- fermented anti ageing



Super Luxe products from beverage company.
contains several fermented ingredients.
Comes with special pouch

Yakult Beautiens Brilliant The Cream

JPY105000 / €977.88

Limited edition moisturising cream, introduced to celebrate the company's 75th anniversary.

The quasi drug product contains the brand's original moisturising ingredients derived from lactic acid bacterium, four kinds of lamellar particles, including the one with vitamin C and E derivatives, essential oils and 25 plant extracts to combat various skin problems caused by ageing.

The cream is claimed to protect skin with moisturisers, antioxidants and pH control, leaving it resilient, elastic and luminous from within

Luxe men's anti-ageing with minerals and GAGs

Sisleyum Global Revitalizer – Dry Skin

€170

Sisley has adapted its global anti-ageing technology to suit men's skin.

Using phytotherapy and aromatherapy, the product is said to recharge the skin's batteries with anti-ageing alkekengi calyx, padina pavonica and pussy willow extracts, stimulating the synthesis of GAGs, collagen and hyaluronic acid. A cocktail of magnesium-rich olivine, malachite, rhodochrosite and smithsonite help combat everyday stress and improve the skin's natural defences, leaving it visibly energised



Anti-ageing plus male-oriented benefits such as soothing razor burn and preventing shine

Beauty devices that play with light



PaloVia Skin Renewing Laser

\$499

FDA-cleared device and gel claimed to reverse the signs of ageing, providing visible results in just one month. It works below the skin's surface where wrinkles form, renewing and stimulating collagen production, and reaching into the skin's sub-layers to treat the ageing support structure with micro-fine laser light



Photon LED Photo-Rejuvenation System

Described as a complete skincare system, which uses a photon device to pulse LED light deep into the skin to stimulate collagen production.

It comes with a cosmeceutical that contains apple stem cell extract, leaving skin cells restimulated and re-energised, reducing the signs of ageing as well as redness and pigmentation



Intelligence in time



Down to Earth

The evolution of nature in anti ageing skincare

Down to Earth

- This trend addresses the practicalities of making and marketing green beauty including
 - Managing price pressure due to varying supply and demand of natural raw materials
 - Mastering challenges of green chemistry (sustainable surfactants, alternatives to parabens, biodegradable formulas, cold pressing and use of green solvents)
 - Balancing different natural and organic certifications (is harmonisation actually adding to the confusion?)
- Growing importance of sustainable sourcing and maintaining biodiversity in the production of beauty products
- Renewed emphasis on repackaging to minimise waste
- Evolution of chemical-free claims (besides parabens, PEGs, petrochemically derived ingredients)
- From a marketing perspective, simplifying text and “stripping back” claims to tell straightforward, direct stories about plant-based ingredients
- Carbon neutral labels
- GMP regulations

Down to Earth (GMP regulation compliance)

SINGULAderm Xpert Eye Contour Gel

€25

Line of skincare products based on "molecular cosmetics"

The products contain peptides, glycoproteins and organic molecules combined with innovative delivery systems said to enable them to penetrate the epidermis and target the skin where it needs to be treated

The eye contour gel is designed to quickly drain and decongest the eye area, reducnt the appearance of dark circles and puffiness. A high concentration of actives and antioxidants ward off free radicals and protect cellular DNA from UVA.

Specifically claims to adhere to GMP regulations



Another High Tech line with Down to Earth claim of "GMP" regulation compliance... limited use of claim

Carbon neutral production



Carbon-neutral product that promotes social sustainability from an Icelandic company

BIOeffect EGF Serum

£95

Anti-ageing serum said to improve the appearance and health of the skin by encouraging it to repair its own cells. The key ingredient is plant-derived epidermal growth factor (EGF), a substance which occurs naturally in human skin and which has the ability to speed up the rate of cellular turnover

Also contains cellular activators, proteins for the maintenance and repair of skin cells, and hyaluronic acid.

Bears the Carbon Neutral Production label. The company has a commitment to environmental and social sustainability, and only uses clean and sustainable geothermal energy to power its green manufacturing plants

Immune-boosting claim, from anti-wrinkle silk pillow developer

Silkskin Revolution Age Reversal Serum



£128

Said to be a stable and powerful antioxidant that stimulates cell renewal and the production of collagen and elastin

The serum boosts the skin's natural immune properties and collagen and elastin production, as well as minimising and repairing damage caused by free radicals. It is also claimed to fight and repair sun damage, and brighten, firm and tone the skin, with natural vitamin C.

Contains 98% natural active ingredients



Developer of silk pillows claimed to have anti-wrinkle properties

EGF, perfluorodecalin



Sunday Riley Perfecting Stem Cell Stimulant II Corrective Serum

\$295

Contains NV-5 Ageless Complex, a proprietary blend of five Native American botanicals used to detoxify, heal, recharge and illuminate the skin. The blend of blue agave, bio-fermented aloe, yeast extract, yellow lady's slipper orchid, prickly pear and cactus is said to prevent cellular inflammation and extrinsic ageing.

Also features toning gotu kola, EGF to increase skin density, and ursolic acid to fight UV damage and restore skin collagen levels and elasticity;

line extension from Nu Natural brand based on complex w/Native American actives, EGF, perfluorodecalin and gotu kola

Cross-category claims

Ideas for further innovation

Anti-ageing haircare

d'Anu Gareth James Hyaluronic Age-Defying Conditioner

£23/€27.34

Claimed to restructure and repair damaged hair.

Formulated with a low polymer hyaluronic acid designed to penetrate deep into the hair and lock in moisture where it is most needed.

All products in this range are made using ethically and sustainably sourced ingredients.



Anti-ageing make-up



Dr. Ci:Labo BB Perfect Foundation

JPY 2625/€22.33

Formulated with the brand's original brightening ingredient, White 377, and contains a variety of moisturising ingredients including EGF, Madonna lily root extract and pearl extract to retain moisture and promote production of hyaluronic acid and collagen.

Anti-ageing fragrance

Kerstin Florian Rosa Damascena Mist

£41/€47.74



The paraben-free spray contains protein-rich caviar extract, which is said to contain an abundance of water, lipids and minerals to provide powerful skin regeneration, help minimise signs of ageing, and improve elasticity, tone, and firmness.

Also contains collagen-boosting peptides and cell-regenerating co-enzyme A, to help reduce fine lines and provide antioxidant protection. It has a natural fragrance derived from rose and mimosa absolute.



For future consideration

More high-tech formulations

- Advances in biochemistry will continue to inspire cosmetic chemists to produce increasingly sophisticated anti-ageing skincare, using the latest actives and delivery systems

More protection

- Shielding the skin from harmful UV radiation and natural and man-made environmental pollution will continue to be a focus of anti-ageing skincare. Researchers are currently working with emerging botanical and marine extracts as well as physical barriers in both formulations and packaging.

The next step for devices

Devices

- Gadgets are often quite stylish but design could be more eco-friendly or sustainable
- More diagnostic tools – to test or measure hydration levels, wrinkle depth, etc
- More devices targeted at men

Advice

- On-the go gadgets in West – combine with smart-phone apps and instant messaging
- Use of video updates for product advice, application techniques to download expertise from Internet)
- Integration of USB points and video screens to download tutorials and update commands

Anti-ageing skincare – future developments

- Increased number of products with:
 - Stem cell activators
 - Sirtuins activators
 - Telomerase activators
 - Neuro-cosmeceuticals
- Complementary topical and ingestible skincare regimes
- Top-up anti-ageing sprays for the face and body
- Anti-ageing products to tighten skin after weight loss or over exercising

Anti-ageing beyond skincare

- **Hair care** - Wash-out and leave-in products that promise to prevent the hair fibre and scalp from ageing
- **Colour cosmetics** - Make-up that moves beyond instant lifting and tightening effects to more long term firming and anti-wrinkle claims
- **Deodorants** - APDs incorporating skincare actives that help prevent crepiness and sagging as well as deodorising the armpits
- **Bath & shower products** - Anti-ageing activity delivered through bath soaks and body washes
- **Fragrance** - Scent molecules designed to convey an image of youth and vitality or to carry anti-ageing actives

Grazie



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