



COSMECEUTICALS 2017

Wendy Lewis takes a deep dive into the professional skin care market and what's driving new launches and consumer demands

IT SEEMS AS IF 2017 IS SHAPING UP TO BE THE YEAR OF THE COSMECEUTICAL, due to the rising preference for physician-dispensed products over non-prescription and OTC products, and a bevy of new launches from popular brands, as well as new brands entering this expanding category.

According to the *Research and Markets* report¹ that forecasts the global cosmeceuticals market to grow at a CAGR of 5.95% from 2017-2021. 'With the growing demand for skincare products from the aging population, the sales of physician-recommended cosmeceutical products is expected to increase in the coming years. The physician-recommended cosmeceuticals segment features well-known brand names, especially in the skincare products space.'

There is a clear preference for new entries that are focused on product differentiation to expand the market from garden variety cleansers and moisturizers to science-based formulations, targeted anti-agers, beauty supplements and drinks, probiotics, and advanced treatment products. Consumers are seeking products that outperform their expectations and fit the bill of innovative problem-solvers that are convenient to use at home.

Among the crop of ingredients that are making a lot of noise, we are seeing more hyaluronic acid, plant stem cells, botanicals, charcoal, and other naturals and organics. Patches, sheet masks,



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and silicone based topicals plus customized skin care products and home use devices are also on trend this year. Although facial skin care still reigns supreme, products that specifically target the lips, neck, body, décolleté, and hands are picking up steam among the professional skincare buyer as well. Therapeutic haircare is another rising star to watch, and topical products for intimate use are starting to show up at conferences worldwide.

Cosmeceutical trends

Looking to the cosmeceutical trends presented at the AAD 2017 in Orlando, FL, Zoe Diana Draelos, MD, a dermatologist and consulting professor of dermatology at Duke University School of Medicine, had this to say; 'Skin rollers, polymer patches, botanical bioreactors and high viscosity silicone films are some of the recent innovations in the market.'

Dr. Leslie Baumann, a Miami based dermatologist and the Founder of the Skin Type Solutions Franchise Systems, says this about the trends she is seeing, 'Our number one selling SKU is retinol. This is great news because it means that physicians finally see the importance of nightly retinol to improve the skin's appearance. The retinol can be one of many brands in our system. There is no clear brand winner of retinol in our STS system.'

According to Dr. Baumann, 'The big trends I am seeing are customized skincare regimens, products that are exclusive to doctors and not sold on Amazon and other websites. Patients are also asking for more neck creams than in the past.'

San Francisco dermatologist Vic Narurkar explains that the cosmeceuticals that do best in his practice as those that are optimally used in conjunction with procedures. 'Patients see better outcomes and also consider them as an investment to procedures. Our tried and true cosmeceuticals are Skinceuticals CE Ferulic Acid and Skinmedica Retinol. These are used pre and post fractional laser resurfacing, and we also simultaneously use C E Ferulic as well as our Clear + Brilliant laser. Pigmentary disorders are a huge concern and the need for non-hydroquinone based agents is well recognized. The introduction of Lytera 2.0 has been well received by melasma patients, especially post Vitalize peel and Clear + Brilliant laser.'

Topical hyaluronic acids have also earned their chops as a must-have cosmeceutical. 'We use Skinmedica HA-5 and recently added the Skinceuticals HA Intensifier. We apply these immediately post injection of Botox and fillers and patients continue these topicals. They enhance the outcomes of injectables,' says Dr. Narurkar.

He adds that a large segment of his patients want 'natural' cosmeceuticals but still demand efficacy. 'The Restorsea Pro line has shown some of the highest loyalty and retention. It is our go to cosmeceutical in patients with rosacea, atopic dermatitis and sensitive skin. The

hydrolyzed salmon roe, which is the active ingredient, has been shown to improve cell turnover,' he says.

According to John Garrutto, Director R&D for Alastin Skincare, 'Retinoids, especially retinol, continue to be in great demand with new advances in targeted delivery, stabilization with reduction of irritative effects on the skin. Products that offer pollution protection are also rapidly increasing in popularity, and are readily being employed in sun care along with sophisticated antioxidants for more broad protective benefits. The focus is for blocking particulate matter from penetrating into the skin and detoxifying harmful pollution-borne compounds and increasing cell survival. Sunscreens continue to evolve with technologies/ingredients to combat infrared (IR) induced damage to the skin, counteraction of IR-induced reactive oxygen species, and protection from degradation of collagen and elastin from UV exposure.'

He continues, 'Active compounds that induce adipocyte activity to increase "volume" in the skin "from within", to promote pre-adipocytes to mature into healthy adipocytes are emerging, focused on deep wrinkling, especially for the nasolabial fold area.'

New Orleans dermatologist Mary Lupo cites Revisions Nectifirm, ISDIN sunscreen, and PROVOQUE™ Eye Complex from Aivita Biomedical as having the highest repurchase rates in her practice. 'Aivita Biomedical was started by stem cell biology researchers at UC Irvine. The product has been amazing as a skin firmer, post procedure healing agent, and improves overall luminosity, texture, and fine lines. All proceeds go to treating women with ovarian cancer.'

New cosmeceuticals on the market

We tracked down some of the year's new entries with an eye to what's coming next.

AIVITA Biomedical

1 PROVOQUE™ Eye Complex \$120

The stem cell-based technology in Provoque has been shown to reduce the appearance of lines and wrinkles around the eye in as early as 14 days. Applied with a medical grade stainless steel roller ball to provide a cooling effect.

2 PROVOQUE™ Facial Serum \$180

This serum contains alpha-2-HS glycoprotein (fetuin), a molecule that is secreted in large quantities by young cells, and targets wrinkles/fine lines, loss of firmness, texture, and discoloration.

Alastin Skincare

3 Alastin Skincare HydraTint ProMineral Broad Spectrum Sunscreen SPF 36 \$55

HydraTint offers next generation wearable sun protection in a lightweight oil-free formula that absorbs quickly and has a subtle, universally flattering tint suitable for all skin types and tones. The silky formula doubles as a primer for under makeup. ▶





▷ **1 Avène**

Avène Complexion Correcting Shield SPF 50+ \$36

A hydrating medium to full coverage formula that contains titanium dioxide and zinc oxide plus vitamins E and C, glycerin, sodium hyaluronate, in three shades to compliment most skin tones.

2 Avène Cold Cream Nourishing Lip Balm \$14

Water-resistant formula for dry, damaged lips provides hydration effect lasting 6 hours after application.

3 Avène Cold Cream Concentrated Hand Cream \$15

Enriched with Avène Thermal Spring Water, with sucralfate, glycerin and alpha-bisabolol, this encapsulated emulsion offers long-lasting, gradual release of hydrating actives leaving a protective lipid film on hands for up to 6 hours.

DUCRAY LABORATOIRES DERMATOLOGIQUES

4 Ducray Anaphase Shampoo \$38

Hairloss supplement that prepares the scalp for hairloss treatment such as minoxidil, containing tocopheryl nicotinate, Vitamins B5, B6, B8 (Biotin), monolaurin, hydrolyzed wheat proteins and ruscus.

5 Ducray Anaphase+ Strengthening Conditioner \$26

Fortifying and detangling conditioner with hydrolyzed wheat proteins, vitamins B5, B6 and B8 (biotin).

ENVIRON

6 Skin EssentiA Antioxidant and Peptide Eye Gel \$50

Energizing gel formulation that improves the appearance of photo-damaged skin with a rich blend of Vitamins C and E, peptides and low levels of Vitamin A to address the signs of aging skin.

7 Skin EssentiA Botanical Infused Moisturizing Toner \$45

Non-oily, pH balanced lotion designed to increase hydration and improve uneven skin tone with a blend of plant extracts, vitamins and antioxidants.



8 Environ Skin EssentiA Hydrating Clay Masque \$40

Contains a blend of hydrating ingredients and natural clay to help eliminate excess oils and exfoliate for a refined complexion. After application, the masque becomes transparent and can be left on for 10-20 minutes or overnight and then rinsed off with water.

Epionce

9 Epionce Daily Shield Lotion Tinted SPF 50 \$38

Tinted water-resisted lotion formula with botanical ingredients that provides broad spectrum protection SPF50 designed for all skin types. Withstands up to 80 minutes of moisture exposure. Active ingredients include titanium dioxide and zinc oxide. This product received the Skin Cancer Foundation Seal of Approval.



GLYTONE

10 Triple Defense Brightening Complex SPF30 \$85

Contains Sepiwhite™ (a compound of essential amino acids and lipid residue), niacinamide, vitamin B3, marine algae complex, mineral complex, and red algae, with 3% avobenzene; 10% homosalate; 5% octisalate; 10% octocrylene, and Aquaxyl™ Plant Sugars.

11 Acne BPO Clearing Cleanser \$38

With 4.5% encapsulated benzoyl peroxide, this acne-fighting cleanser kills surface acne bacteria and is gentle enough for daily use on all skin types.

IS CLINICAL®

12 iS Clinical Hydra Intensive Cooling Masque \$78

Luxurious cooling treatment that refreshes skin and provides soothing hydration, featuring natural botanical antioxidants centella asiatica, green tea,



aloe vera, and rosemary extracts with botanically sourced hyaluronic acid.

13 iS Clinical Neck Perfect Complex \$78

Targets the neck, jawline and décolleté to diminish the appearance of lines and wrinkles and improve skin tone and texture. Contains a combination of fruit acids and White Willow Bark Extract, Prunus Amygdalus Dulcis (Sweet Almond) Seed Extract, Hyaluronic Acid, Hydrolyzed Rice Protein and Calcium Pantothenate (Vitamin B5) to help stimulate collagen production and cellular metabolism.

ISDIN/ISDINCEUTICS

14 A.G.E Reverse – launching late December 2017 price TBD

This formulation from ISDIN, a newcomer to the US market, protects skin from pollution with Exo-P, moisturizes with reticulated hyaluronic acid and ultraglycans and slows the formation of AGEs with carnosine.

NeoCutis

15 NeoCutis MICRO-BODY Rejuvenating Cream \$120

A rich yet non-greasy body cream containing salicylic acid to smooth dry, rough skin and target aging skin with body-rejuvenating ingredients, including ceramides, hyaluronic acid, petrolatum and glycerin for all over hydration.

PCA SKIN

16 PCA SKIN Hyaluronic Acid Boosting Serum \$115

This potent hyaluronic acid boosting serum works on three levels: on the surface, deeper in the skin and by increasing the skin's own hyaluronic acid production. Contains



hyaluronic acid and sodium hyaluronate, hydrolyzed hyaluronic acid, HA-Pro Complex – PCA SKIN's proprietary blend that works to stimulate the production of the skin's hyaluronic acid, plus ceramides and niacinamide.

Restorsea

17 PRO Restorsea LipMagic™ \$35

This lip plumper contains Aquabeautine XL® (INCI: hydrolyzed roe), vitamin C, licorice leaf extract, soybean seed extract and palm oil to work on the outer layer of skin, gently and without irritation for smoother, plumper-looking lips.

SkinCeuticals

18 SkinCeuticals Ultimate UV Defense SPF 50 \$40

Available in June 2017

This new lotion absorbs instantly for continuous hydration, with a blend of zinc oxide and chemical filters for effective broad-spectrum UVA/UVB protection at SPF 50. Includes hyaluronic acid for all-day hydration and silica technology to control sweat and oil.

19 SkinCeuticals H.A. Intensifier \$98

A multi-beneficial formula containing a high concentration of pure hyaluronic acid (HA), Proxylane™ and purple rice extract to help renew plumpness, elasticity, and firmness. Works to stimulate hyaluronic acid production in skin and prevent depletion for reduction in the appearance of crow's feet, nasolabial folds, and marionette lines.

SkinMedica

20 Lytera 2.0 Pigment Correcting Serum \$154

Featuring a new formula that is both hydroquinone and retinol-free, and contains tranexamic acid, phenylethyl resorcinol, niacinamide and tetrapeptide-30, a marine extract blend and phytic acid for advanced skin brightening results. ▶



▷ **1 HA5 Smooth & Plump Lip System \$68**

This two-step system can be used as a topical solution for everyday lip enhancement and/or as a companion to dermal filler injections. Also contains benzyl nicotinate, an ingredient proven to increase microcirculation.

Thermi Aesthetics
2 Luxe by Thermi \$160

This pre and post procedure duo consists of Erato Balance Feminine Cream Cleanser and Erato Elixir Feminine Moisturizing Treatment. The cleanser is pH neutral and contains organic extracts of plants from the Swiss Alps with a blend of mallow extracts and bisabolol. The moisturizing treatment is formulated with essential fatty acids, biosaccharides and hyaluronic acids to soften the vaginal mucosa.

VIVACY Paris
3 Stylage Skin Pro L'Intense Intense Moisturizing Cream \$90

This rich moisturizer contains the VIVASÔME® Complex, anionic polysaccharides including hyaluronic acid, stabilized vitamin C, Unitamuron H-22, Uniprosyn PS-18, and Syn®-Ake, which help to relax facial muscles for long-lasting hydration. Packaged in a patented airless jar with a soft touch and slide pump to prolong the duration of usage.

ZO Skin Health
4 Oclipse® Daily Sheer SPF 50 \$70

Non-greasy, quick-drying sunscreen delivers superior

protection (80 minutes) outdoors and contains glycerin to replenish lipids and restore the skin barrier function. Water- and perspiration-resistant, the formula also contains ZOX12™ – a 12-hour, time-release antioxidant complex that fights free radicals.

5 Oraser® Cellulite Control \$95

This new crème offers instant firming effects and textural improvement, reducing the appearance of cellulite. Formulated to help improve microcirculation, reduce skin contour, encourage the production of collagen, and restore hydration.

6 Rozatrol™ Normalizing Serum \$88

Daily treatment serum targeting red, sensitized skin by reducing excess oil and inflammation. An enzymatic exfoliator provides ultra-mild exfoliation, while amino acids support optimal microcirculation to prevent the signs of aging skin.

COSMECEUTICAL TRENDS

- 1 Hyaluronic acid
- 2 Hair restoration treatments
- 3 Feminine treatment products
- 4 Polymer patches
- 5 Skin rollers
- 6 Volumizers
- 7 Brightening compounds
- 8 Pre/post procedure regimens
- 9 Body and anti-cellulite creams
- 10 Lip treatments
- 11 Retinols
- 12 Stem cell technologies

► **For more information, visit:**

- AivitaBiomedical.com ■ Alastin.com ■ AveneUSA.com
- DermaConcepts.com ■ Ducray.com ■ Epionce.com
- Glytone.com ■ Isclinical.com ■ ISDIN.com
- Neocutis.com ■ PCASkin.com ■ Restorsea.com
- SkinCeuticals.com ■ SkinMedica.com ■ Thermi.com
- Vivacyeu ■ ZOSkinHealth.com

Reference

1. Research and Markets, Global Cosmeceuticals Market 2017-2021, November 2016. Available at: www.researchandmarkets.com/research/nl2gih/global (last accessed 4 May 2017)