

**Downloads**

Additional information at

www.cossmma.com/download

Your access codes for December:

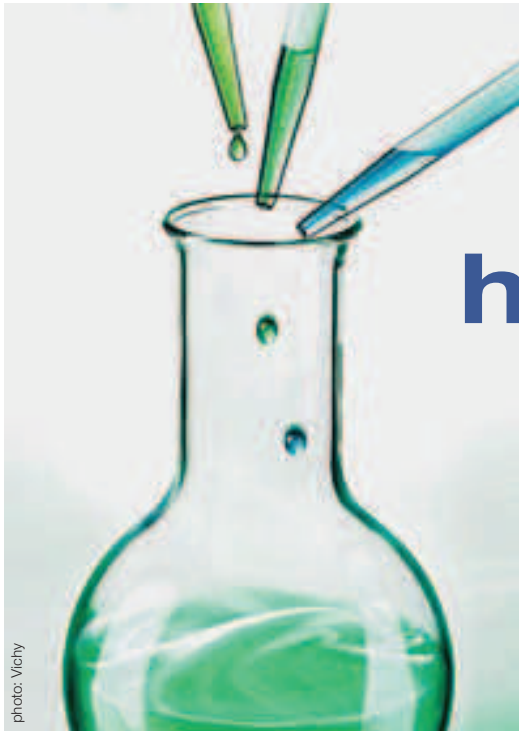
User name: **cossmma12** Password: **derma**

photo: Vichy

New ingredients respond to the trend towards natural cosmetics but also to the growing anti-aging market

Trends

The future is high-tech green

COSSMA editor Angelika Meiss outlines the current trends in the market for active substances and raw materials.

The most important suppliers also have a majority of the production capacity. BASF, for example, hold in their portfolio six of the product categories defined by Kline. This offers the client a one-stop shopping opportunity. Whilst at one time price was the ultimate criterion for the buyer, today it is additional consumer benefits and innovation that are gaining in importance.

The European market for active ingredients (as opposed to raw materials) is, according to Frost & Sullivan, quite different. More than 100 suppliers of active ingredients serve the European market. With a 77 percent share it is moisturising actives that enjoy the biggest slice of the market. In second place come exfoliant actives with 11 percent, and in joint third place, each with 5 percent, are antimicrobial actives and plant-based actives.

Anti-ageing actives: a small share, but with huge potential

Although the market share of anti-ageing substances is surprisingly low, at only 2%, the trend in that area is quite promising. Market experts expect an average annual growth of 6.9 percent into 2014. New launches are expected to bring quality improvements and new developments in antioxidative properties, as well as improvements to compatibility in the interaction with other active ingredients. Launches of new products with naturally and sustainably produced active substances are also likely to be popular. The focus in the development of new active ingredients is on improved solubility, enhanced stability and an even greater effectiveness.

In the area of peeling components, Frost expects an average annual growth of 5.8 percent into 2014. Somewhat less exuberance is expected in the moisturizer segment, the largest active-ingredient segment, at 4.1 percent plus per year into 2014. The segment of anti-microbial ingredients is also expected to see only modest growth, at 2.5 percent. With an average annual growth of 3.4 percent, the prognosis for natural extracts is more appealing.

John Madden, the director of ingredients research at Euromonitor, is convinced that in the future far more weight will be given to scientific evidence. Other issues will be a linkage of a more scientific orientation with nature. The demand for natural ingredients is higher than ever before, but at the same time there is also a strong anti-aging trend. And the latter is generating the strongest growth.

Furthermore, current launches of new ingredients are showing that an important role is played by simpler processing of ingredients, cost efficiency and energy-saving processing in the cold manufacturing, as well as new scientific findings concerning well-established ingredients.

One growing market is the one for natural cosmetics; the focus there is on providing innovative ingredients. The problem in product segments such as deodorants/antiperspirants, sun-care products, conditioning shampoos, conditioners and styling products is that it remains difficult to achieve a product performance using ingredients conforming to natural cosmetic standards that is comparable to that possible with synthetic ingredients.

In Europe in 2009 a total of 280,000 tonnes of ingredients for cosmetics and toiletries* were sold. This market grew in an economically difficult year much better than the raw materials markets for other consumer products. After steady growth in 2009 the first half of 2010 showed an even stronger upwards trend.

The most significant categories in this sector are special surfactants, which account for 23 percent by value. These include amphoteric, anionic, cationic, and non-ionic surfactants. In quantity terms the category enjoyed a market share of over 40 percent. In second place, at 18 percent, are emollients with emollient esters and plant oils. Conditioning polymers such as silicones, polyquaternium derivatives and conditioning proteins were the third biggest category with a 16 percent share.

Kline are forecasting an average annual growth for cosmetics ingredients, up until 2014, of 2.6 percent. With "green ingredients" expected to be a major factor. Sales of UV filters have also grown well in recent years. Most product categories are dominated by a few large suppliers. For instance, in the field of hair styling polymers the three biggest suppliers have an 87 percent market share.

2010 problem-solving ingredients

It's no wonder that so many ingredients designed to serve as problem-solvers came onto the market in 2010. E.g. ingredients intended to block bacterial enzymes, (**Dermofeel TEC eco** from **Dr. Straetmans**) and an antiperspirant made of plant extracts (**La' Deo** from **Lachemi Chemorgs**) were brought out in the area of deodorants. A biopolymer made of corn starch that is soluble without an added solvent is intended to keep curls stable (**Asensa NFF 11** from **Honeywell**). Alternatives to traditional preserving methods continue to be important in the natural cosmetics area. Hence the launch of products that are claimed to have self-preserving effects (**Symbiomuls WO** from **Dr. Straetmans**), plant-based emulsifiers for "green" preservation (**TegoCare PSC 3** from **Evonik**) or EO-free and non-irritating preservative boosters made from renewable materials (**Velsan SC** from **Clariant**).

2010 saw the introduction to the market of many new ingredients specifically for the natural cosmetics area that are intended as substitutes for synthetic ingredients that had fallen into bad repute. One issue of growing significance is that of sustainably acquired resources in whose production a major saving in processing energy is possible. But exotic product concepts such as ingredients made of certified precious stones are also attractive for certain product concepts.

Whilst a few years ago one heard only the frequent announcement that a resource was now available in certified organic form, now the issue of fair trade, particularly in the Year of Biodiversity, is gaining significance.

Anti-aging and more

Approaches from the field of medical research have been adopted ever more frequently for use in the cosmetics branch.

Stem cells are currently at the centre of a trend in cosmetics. Epidermal stem cells are responsible for skin regeneration. The assumption is that if it is possible to protect or activate skin stem cells then it should also be possi-

ble to influence the aging process of the skin. Antioxidants and UV filters, e.g., are used to protect stem cells. There are now also plant-based stem cells that are supposed to protect the epidermal stem cells.

The anti-aging ingredients that came onto the market in 2010 include, e.g., an active ingredient made from red algae which is said to influence the frequency of cell division (**Xcell-30** from **Greentech**), a tetra-peptide to support the body's circadian rhythms to support the body's circadian rhythms (**Chronogen** from **Vincienc**), a moisturiser to regulate genes (**Revidrate** from **Sederma**), ingredients used to activate the longevity genes sirtuins (**Vivendin** from **Rovi Cosmetics**) and DNA-protecting ingredients (**dGlyage** from **Lipotec**). The active ingredients used for lightening the skin represent another growth market. According to Euromonitor, they generated a sales volume of 9.8 billion US dollars worldwide in 2009. Though this market used to be strongly concentrated in Asia, interest in Europe and the USA is now growing in this segment.

Thus in 2010 a plant-based tyrosinase-inhibiting ingredient (**Nivitol** from **Unigen**) came onto the market, as did an ingredient that is said to influence melanogenesis and have an effect similar to that of hydroquinone (**Radian-skin** from **Lab Séro**).

Another important area for new active ingredients is the anti-cellulite segment. In that area, an ingredient that influences the detoxification mechanism of cells with ximenynic acid was presented in 2010 (**Tego Xymenynic** from **Evonik**).

Consumers want radical product solutions. For instance, how about an active ingredient like **Kelisoft** from **Sederma** for deodorant products, that slows the growth of facial and underarm hair, causes thinner hair growth and thus reduces the need to shave. Or a substance like **SymPeptide 226EL** from **Symrise**, which thickens and lengthens eye-lashes?

The cosmetics industry is also drawing on ingredients familiar to people from the food sector with increasing frequency. This has been evident in recent years through the example of

super-fruits with their high share of antioxidants and phyto-nutrients. But putting cosmetic ingredients to use in the form of nutricosmetics is also a trend that will probably take on a far greater role in the future.

Key trends at a glance

A large potential that has yet to be researched in detail is associated with nano-technology, stem cell technology



photo: BASF

Supplier market characterized by a strong concentration process in recent years

and peptides. According to Euromonitor, the vision of the future is one of tailored formulas: "DNA-customized cosmetics".

The trend towards green substitutes for synthetic products, as well as towards green power substances will continue. After organic certification of resources, the issue of sustainable production will have greater prominence. The combination of products that provide beauty from the inside and out will increase – as will the development of cosmeceuticals as an example of trans-segment development. Also important in the launch of new active ingredients will be the multi-functionality of the substances.

The bottom line for all of these developments: the linkage of high-tech developments with the theme of nature is a trend issue that will continue to strongly dominate product launches in the coming years.

You will find additional German-language information associated with the lecture presented by COSSMA's editor on the occasion of the Karlsruher Kosmetiktage, at CVUA on 27 Oct. 2010, on the Internet; see Internet button.

Angelika Meiss
Managing Editor, COSSMA,
Karlsruhe, Germany

