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There was more fizzle than sizzle in the sun care industry last year.

Suntan product sales dropped 3.5% to \$417 million for the 52 weeks ending Dec. 28, 2003 in supermarkets, drugstores and mass merchandisers, according to Information Resources Inc., Chicago. These figures do not include Wal-Mart sales.

For the past several years, it has been easy to blame the economy for across-the-industry personal care sales stopping short of expectations. Until recently, though, sun care seemed immune; in 2002, IRI posted gains of 2.3% for the market above the previous year. Though the increase wasn't stellar, it seemed that sun care was, at least, holding its own.

With public awareness campaigns on the dangers of UV exposure and a wealth of sun protection options, what happened in 2003? Major marketers shared their ideas on why sales were low, and how to pick them up again for the coming vacation season.

Gearing Up for Summer

During a not-so-hot year, Hawaiian Tropic was more fortunate than other players: the No. 4 brand in suntan lotions and oils posted a 7% gain for the year ended Dec. 28, 2003, according to IRI.

It's not just luck, but a complete ingredients-to-packaging formula for success, that keeps Hawaiian Tropic in the black, executives said.

"The weather played a huge part (in the market's sales decline) last year," said Stephanie Mellenberndt, director of marketing, Hawaiian Tropic, Daytona Beach, FL. "Our Spring Break season was rainy and cold. At the beginning of May, we were beginning to sweat a little bit. But by the end of that month, travel came back around, and we saw our sales pick up. In the end, our numbers increased for the year."

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Tourism in general has been down in the years since 9-11, but “This year it should be different,” Ms. Mellenberndt said. She cited data from Florida-based The News Journal, which projected high tourism for 2004. “Since 9-11, people have been waiting until close to their vacation time to book travel and accommodations,” she noted, “but this year, tourism bureaus report that people are already booking their summer vacations.”

Hawaiian Tropic has big plans for 2004. Convenience will be the big word for this year’s sun-worshipping consumer, Ms. Mellenberndt said. “Consumer trends are moving toward convenience and portability,” she said. With that in mind, the company launched its Convenience Pack, applying it to the Ozone Sport and Baby Faces products. Each boasts an SPF of 60+. The bottle includes an interlocking 2-oz. container that is refillable and can be tossed into a gym bag, diaper bag or purse.

Hawaiian Tropic also introduced a luxurious Tanning geleé with SPF 4 and a blend of vitamins and extracts, and a new Faces formula that is light and sheer. Oil Free Faces 30 SPF features convenience in its packaging; it includes a mirror, so the wearer can see whether the application is even.

“We’ve always been innovators,” Ms. Mellenberndt insisted. In fact, executives said the 35-year-old company was the first to offer to the U.S. mass market an SPF above 15, and opened new ideas in the children’s, chemical-free sunscreen and aromatherapy sun care categories.

The high SPF of Ozone Sport and Baby Faces caters to customers’ UV-ray concerns. How high will SPF go? “That all depends on the (FDA OTC sunscreen) monograph,” Ms. Mellenberndt said.

Although some observers don’t expect the monograph to go above SPF 30, marketers are hoping for a higher number. Still, “I can’t imagine it going higher than 70. There is a small increase in protection in increments even as you go above 70, though, so it’s not impossible,” commented Ms. Mellenberndt.

The convenient, fun bottles were a hit when they were launched in Florida just after Christmas, Ms. Mellenberndt revealed. “We can’t keep Sport on the shelf,” she said. The new packaging will go nationwide this spring.

Gray Days, Fewer Rays

As Ms. Mellenberndt pointed out, an unusually rainy season can impact sun care sales. She was not alone in this assessment; other marketers contacted by Happi commented that the wet season washed out sales in the U.S. last summer.

Banana Boat’s sales dropped 0.7% last year, though at \$49 million, the brand held its No. 1 spot in suntan lotions and oils for the year ended Dec. 28, 2003, according to IRI.

“The 2003 season was hopefully a fluke,” said Parker Gilbert, vice president of marketing, Banana Boat/ Playtex. “The National Weather Service reported record levels of rainfall for most of the eastern half of the U.S. Obviously, with a category so dependent on the sun for its sales, rain and lack of sunshine had a huge impact on our sales, as well as other categories that depend on warm weather.”

Playtex’s strategy for 2004 relies heavily on thorough market research, according to Mr. Gilbert. “We learned from research in 2003 that consumers are very frustrated with



Banana Boat’s Suntanals pamper, protect and heal skin exposed to the sun.

the in-store shopping experience for the sun care category," he said. "We are listening to consumers and simplifying the shopping experience with a very impactful packaging restage."

The new packaging highlights the key benefit and includes the SPF displayed prominently. "This will allow busy consumers to shop our brand easily and quickly," Mr. Gilbert said.

Another big step toward consumer convenience is the strategic placement of five vending machines in southern Florida. The machines dispense products quickly and easily for sun-worshippers who have forgotten to carry coverage along with them.

"These places were selected because they are locations where people are outside for the day, and may not have access to sun care if they have forgotten their own," said Mr. Gilbert. The project is still in its early stages, but "We are monitoring the success of the program and evaluating a further roll-out," Mr. Gilbert revealed.

In addition to delving into convenience, Banana Boat has launched new formulations. Surf is formulated with aquashieldH2O, a water-in-silicone emulsion formula, to provide a waterproof shield for up to eight hours of protection. The Suntanals line expanded with SPF 30 and with Aftersun lotion, infused with chamomile, lavender and aloe vera.

There is also a Kids SPF 50 for consumers who desire a higher SPF product in the children's segment. "It has a unique anti-burn system that will provide moms the assurance that their child's sunblock will be waterproof, sweatproof and hypoallergenic," Mr. Gilbert said.

Other developments for Banana Boat include Kids/Sport Quik Blok, reformulations of Quik Blok with a new spray trigger to offer fast, easy and accurate coverage, and Sport Quick Dry SPF 30, another improvement to an existing product, according to executives.

"It is our hope that in the 2004 season, the sun will shine and we will all see category growth once again," said Mr. Gilbert.

A Fancy Tan

One trend that stays hot year after year is added benefits so products "do more." So-called tan extenders, skin caring ingredients and damage inhibitors are all popular in the sun care category this year.

According to executives at Neutrogena Corp., Los Angeles, CA, many active people eschew sunblocks for aesthetic reasons. Sunblocks can be too greasy, can run and may sting the eyes, making consumers hesitant to wear them.

In response to this dilemma, Neutrogena introduced Active Breathable sunblock SPF 30 and SPF 45, "a breakthrough formula that revolutionizes active sunblocks," according to company executives.

Active Breathable sunblock has a lightweight formula containing silica powder to absorb oil and allow skin to breathe. Specially developed for active use, the StayPut lotion adheres to the skin, providing durable protection that resists running into the eyes, Neutrogena executives said. The sunblock contains Parsol 1789 to defend against the effects of UVA rays. The product also protects the skin from UVB rays.

Coppertone is upping the ante, too. The company introduced several new products under the Endless Summer umbrella of products. Included among these is Coppertone Endless Summer Ultrasheer Sunscreen lotion.

"(It is) a revolutionary sunscreen with an antioxidant complex called A07 that not only

provides SPF protection, but also enhances the health and appearance of the skin," insisted Mike Concannon, vice president, sun care marketing, Coppertone.

The light, non-greasy formula is available in SPF 15, 30 or 45 beginning in April.

The company also developed Endless Summer Ultrasheer sunscreen stick in SPF 30. "It has the same powdery, luxurious feel on the skin, but in a convenient stick form," Mr. Concannon said. The stick is available this April.



Hawaiian Tropic offers new concepts for Ozone Sport with a spray nozzle; Baby Faces with a snap-off travel size bottle and Tanning geleé with sunscreens.

Breeze Products, Largo, FL, provides indoor tanning lotions and airbrush solutions to tanning and beauty salons, day spas and medical clinics. The company also produces products for private label and contract clients, executives said. The company launched its Diamond range at the end of 2003.

The formulation includes Creatine, according to Robert Dowdell, vice president of research and development, Breeze Products Inc. He explained that Creatine has been shown to have beneficial muscle toning, and in the Diamond range, it exhibits good skin care properties when applied topically.

Breeze executives aren't worried about the downward trend in sun care sales. "Breeze Products experienced healthy growth in 2003, in spite of a general downturn," Mr. Dowdell revealed. "Innovative new products helped sustain the growth. In particular, the Breeze anti-aging products were a success, and indicate a greater consumer awareness in skin care, as well as basic self-tanning."

Bright Ideas

Most of the recent sun care developments in the U.S. involve new products or snappy packaging. The active materials, however, haven't changed much: it's been several years since Avobenzone was approved by the FDA.

That's all about to change, according to executives at Symrise Inc., Teterboro, NJ. The company has submitted a new sunscreen for the U.S. market to the FDA for inclusion in FDA's recently-introduced Time and Extent Application (TEA) program for OTC monographed drugs.

The sunscreen, isoamyl p-methoxycinnamate (USAN: amiloxate USP), new to the U.S., has an excellent safety and efficacy profile, executives said.

The ingredient, marketed under the name Neo Heliopan E1000, is a nature-identical ingredient which is structurally very similar to ethylhexyl methoxycinnamate, according to Symrise executives. Isoamyl p-methoxycinnamate is found naturally in an Asian plant, *Kampferia galanga*. Rather than removing active constituents from natural materials—which is a labor-intensive process with relatively small yield—the technology allows for an effective active with outstanding attributes, said Terry Mahon of the company.

"The dynamics for marketers are that in the future, they will have a new palette of sunscreens at their disposal," said Mr. Mahon. "This could offer benefits such as improved formulations and better sun care protection features."

Neo Heliopan E1000 could be available as early as April, pending FDA approval, Mr. Mahon said.

"We feel formula dynamics will change dramatically as this ingredient is approved and goes into formulations," he commented. "The product will provide an entirely new option for sunscreen marketers."

Keeping Up Appearances

Choices abound in UV protection, but what about consumers who want the look of a tan without the potential hazards?

Individuals have long been able to obtain artificial "tans" without sitting in the sun by using formulas that contain dihydroxyacetone (DHA). One needn't risk an orange tinge or too-dark a tan when applying today's self-tanning products, according to marketers who spoke to Happi.

Neutrogena offers Build-a-Tan, a gradual sunless tanning lotion that allows the customer to build up her own tan, at her own pace. For instance, a tropical-style tan can be obtained by applying Build-a-Tan twice in one day, whereas applications every other day result in a gentle, all-over glow, executives said.

Coppertone continued on the success of its Endless Summer Sunless tanning formulas with Endless Summer Sunless Tanning foam. The foam is a dual-chambered formula that contains a color activator on one side and the tanning agent on the other. The foam provides a more convenient way to achieve a natural-looking color, and it dries in just five minutes, executives said. It is available in April in Light/Medium and Medium/Dark versions for \$11.99 each.

MD Formulations, San Francisco, CA, takes the worry out of self-tanning with its new Sunless Tanning crème. The all-natural formula is suitable for sensitive skin and can be used on both face and body without clogging pores or irritating sensitive skin, according to company executives. The upscale Tanning crème retails for \$26 at select spas and salons, as well as online.

Professional Help

Sunless tanning has come a long way, but consumers can be intimidated by attempting the process at home. Many salons offer sunless tanning booths to cater to such clientele.

The typical salon visitor can choose from a variety of options, such as the depth of color and preparatory options, such as exfoliation.

With choices increasing, "Salon owners may end up needing more help to push their products, in terms of literature (and other forms of education)," recommended Antonia Payne, public relations manager, Sun Laboratories, Chatsworth, CA.

Sun Laboratories' sun, skin, body and hair care lines are sold exclusively to professionals under the registered trade name Sun. The products are distributed nationwide.

With more than 100 products in its portfolio, Sun Laboratories is always open to trying something new. "In the past few months, Sun has been going through some exciting changes," Ms. Payne said.

These include the new Instant Self Tanning spray in a can, an Airbrush Tanning unit and the Handy Tan Sprayer unit. Airbrush Tanning and Handy Tan Sprayer come in two shades, Ultra Dark and Dark Sunsation. Instant Self Tanning comes in a shade equivalent to Ultra Dark and is "the hottest product we have right now," Ms. Payne said.

She added that there's still growth in the sunless tanning industry. "The industry is a big one, and with more education as to why tanning indoors is better for you than going out

in the sun, I believe people will use (the method) more," she insisted.

That Magic Touch

Sunless tanning in a salon may seem like a luxury, but it's more affordable than one might think. Single salon sessions can cost as little as \$25, according to marketers contacted by Happi. With sunless tanning capabilities cropping up in salons nationwide, and at-home products crowding out store shelves, where does a marketer go from here?

Executives at Solon, OH-based MagicTan Corp. believe it's not just the DHA-based solution, but the application method that makes all the difference. MagicTan introduced a sunless tanning booth that is a revolution in the industry, according to Veronique Munro, chief executive officer of MagicTan Los Angeles and MagicTan Corp.'s spokesperson.



The MagicTan booth has 36 spray jets for a natural glow without the dangers of UV.

MagicTan distributes across the country to salons with a tanning booth specifically designed to work with MagicTan formulations.

Ms. Munro's interest in MagicTan is personal. "My skin does not tan," she said. "I burn, peel and then turn white again. I've tried other spray-on units and never quite found the results I was looking for." She tried MagicTan and, delighted with the results, acquired exclusive distribution rights.

"MagicTan is the top of the line in self-tanning," Ms. Munro insisted. "It is a safe and effective way to tan several shades darker in record time."

The MagicTan booth has 36 spray heads, more than any other sunless tanning machine has, according to MagicTan executives. It's also much more compact than other machines, at 4x5x7.5 feet, and is fully customizable, including the salon's logo if desired.

Tanning in the booth takes less than a minute. The client is sprayed with a very fine, all-over mist and comes out from the machine virtually dry, according to Ms. Munro.

The booth is designed specifically to work with MagicTan's sunless tanning solutions. "We have a proprietary solution with the perfect molecular structure for our spray nozzles," said Ms. Munro. "Between the delivery system and the solution, a MagicTan can last twice as long as other sunless tans. It's the combination that makes it work."

Three different solutions are available; all contain DHA. Two include a bronzer for instant results. "The effect (of the DHA) shows immediately, but it takes about six to eight hours to fully develop into a beautiful golden-brown color," Ms. Munro explained. Level One contains a light bronzer; Level Two has a darker bronzer.

For individuals who have the time to wait for the full effects, or for those who don't want the bronzer getting on their clothes, there is also a "clear" option. All three tans last up to a week.

MagicTan offers a complete line of retail products as well, including a non-abrasive exfoliator with pineapple, an aloe-based prep gel and an Extend cream that contains DHA to extend the life of the tan for two to three days. Touch-up products to be used between applications are also available.

"MagicTan gives people the opportunity to have a natural-looking tan without risking UV damage," Ms. Munro said. "It smells really pleasant, it's not sticky and it lasts for up to a week. It's truly extraordinary."

Parting the Clouds on UV

An array of new products or a sunnier summer may help turn things around for the sun care industry, but education remains the primary goal.

Last year, Schering-Plough initiated its Sun Safety Alliance program, a non-profit organization dedicated to reducing the incidence of skin cancer in the U.S. through educational programs. The Alliance was created by Coppertone and the National Association of Chain Drug Stores.

The Sun Safety Alliance is helping Americans "Get Smart About the Sun" by supporting Coppertone sun care products. It kicks off May as Sun Awareness Month, according to Mr. Concannon. Sun Awareness Month is an initiative to educate consumers about the dangers of the sun, while promoting everyday sun protection.

"Although we can not control the weather, we can continue to educate consumers on the importance of wearing sunscreen as part of a total sun protection program every day of the year," he said.

That's advice to tote along wherever one goes.

Looking for a new ingredient to incorporate into your sun care product? A list of them can be found on p. 88 in the print version of Happi.

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