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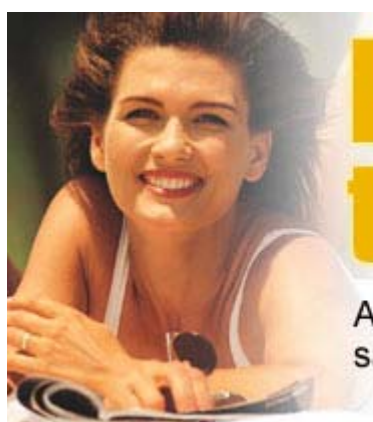
Features

- [Home](#)
- [Current Issue](#)
 - [Table of Contents](#)
 - [Breaking News](#)
 - [Editor's Page](#)
 - [Meetings/Events](#)
 - [Ad Index](#)
 - [Formulary](#)
 - [Grayson Report](#)
 - [New Products](#)
 - [New Package](#)
 - [Personnel Round Up](#)
 - [Article Archive](#)
 - [Formulary Archives](#)
 - [Webguide](#)
 - [Company Websites](#)
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[Return to Table of Contents](#)



Here Come the Sun

After a couple of slow years, sun care sales are up at last.

Melanie H.
Associate

Last year, Happi reported a downward trend in sun care sales for 2003 despite heavy efforts and UV-education initiatives. That's all in the past now—suntan product sales increased 2.3% to \$418.1 million for the 52 weeks ended Dec. 26, 2004, according to Information Inc., Chicago. (These figures are for supermarkets, drug stores and mass merchandisers like Wal-Mart.)

This is brilliant news for marketers, who introduced new products and tweaked old favorites in 2004. They were banking on people's love of the sunny outdoors—and a healthy glow—risks—to lift sales out of a slump. It worked.

"Banana Boat knows that most consumers enjoy the sun. In fact, nearly 70% of the category volume comes from consumers who are either tanners, color seekers or want moderate color," revealed Jean Fufidio, vice president of marketing, Banana Boat. "In choosing sun care products, consumers look for a balance of both color and protection. This is their ongoing internal level of SPF used vs. how much color they want."

As the No. 1 sun tan lotion and oil brand, Banana Boat knows whereof it speaks. The brand garnered \$56.9 million in sales during 2004, a 19.3% increase over the previous year, according to IRI.

With customers getting choosier and obviously willing to spend a little more, the door

for new sun care products in 2005. At the same time, the FDA's SPF monograph looming near future is causing marketers to wonder whether they need to reformulate once it goes into effect.

This may present a slight challenge, according to industry experts. "Hawaiian Tropic will respond to the sunscreen monograph once it is issued," said Stephanie Mellenberndt, marketing manager for Hawaiian Tropic. "Because it is unclear what the final outcome will be, it is hard to say whether the formula will need to be altered or not. There will be a transition period where any necessary changes will have to be addressed."

The packaging may need to be tweaked once the monograph is finished. "It is my understanding that further study is needed to assess how to practically package small products which have an SPF claim, and incorporate the new drug facts labels," said Charles Mizelle, national product development manager, Sothys USA, Miami. "The label is quite large and must have a specific format. Applying this to a lip balm or other miniature product has proven impractical."

However, the monograph, tentatively scheduled for release later this year, may open more doors than it closes, some industry professionals insist. "When a monograph is finally announced by the FDA, a true roadmap will be available for formulators to create new sunscreen formulas at broad-spectrum protection," said Julian Hewitt of Uniqema, New Castle, DE. (See "The Roadmap on the Monograph Debate," p. 86.) Meanwhile, marketers continue to develop and launch new products to please every member of the family.

Sun Savvy

One major trend in the sun care industry during the past several years has been a move toward products that do much more than thwart UV rays. Multi-purpose products fit the bill for today's sun worshipper. A relatively new phenomenon—combination sunscreen and insect repellent—grabbed a chunk of the sun care market last year, with \$3.7 million in sales, up 8.8% over 2003. In addition, convenient, no-mess application and packaging are priorities for consumers.

Key players Banana Boat and Hawaiian Tropic both repackaged products last year. Hawaiian Tropic focused on its After Sun product line, including Aloe After Sun moisturizer, Cucumber Soothing Aloe Vera and Cucumber Melon Aloe Vera treatment.

"Convenience, portability, high SPF and new, innovative packaging (are popular), just to name a few," quipped Jennifer Engler, public relations and advertising manager, Hawaiian Tropic.

The company also repackaged its Dark Tanning oil, but "the formula is still the same," Engler said.

Banana Boat renamed its sunless tanning line Summer Color Sunless. "(The name change is to) communicate that the product is made by Banana Boat, an expert in sun color," said Lisa Fufidion, the company's vice president of product development.

Summer Color Sunless can be adjusted by the user with more or less application. The product fits the individual, Ms. Fufidion said. "The self-adjusting color provides each individual with a look, as it works with individual skin type," she said. "It lets you be you."

Banana Boat also offers foaming bronzers to give a hint of immediate color, "so you don't have to wait to get that summer color," Ms. Fufidion said.

Packaging should not only be pretty; it should make application easy and pleasant, industry experts insist. Fruits & Passion, Quebec, Canada, said consumers want sun care products that are easy to use and without mess.

"During vacation time, people are willing to use SPF lotions as long as they are easy to use," said Séverine Mathé, marketing manager, product development for Fruits & Passion.

"Lotions with pumps or vaporizers, anti-sand caps and non-greasy mousses are practical for an easy application product."

All this to-do about packaging doesn't mean consumers are letting down their guard about hazards of UV, Ms. Mathé said. "The SPF protection levels (of Fruits & Passion products) to better protect the skin from the sun."

Of course, what's inside the bottle is as important as the bottle itself. "Products that serve purposes—protect, moisturize, make the skin glow and offer SPF protection—are on the agenda," Mathé commented. "Light and pleasant textures which can be applied evenly on the skin and attractive yet practical packaging are popular."

Coppertone went inside the bottle too with new Coppertone Endless Summer Ultrashield lotion containing AO7, an antioxidant complex. "AO7 not only provides SPF protection but also enhances the health and appearance of the skin," said Mike Concannon, vice president of marketing at Coppertone. "It is a light, non-greasy formula designed for every day use. SPF formulas—15, 30 and 45—are available next month."

Coppertone also introduces the Endless Summer Ultrasheer Sunscreen stick with SPF 15. "It has the same powdery, luxurious feel on the skin, but in a convenient stick form," Mathé said.

Coppertone is hot on the trail of sun care trends. "As the leader in sun care technology, we continue to research and develop the most revolutionary technologies in sun care products," Concannon insisted. "Coppertone will continue to introduce products driven by primary consumer trends including higher SPF products, products with improved skin feel and products that offer convenience."

Some Clouds Part on the Sunscreen Monograph Debate

After a long waiting period, the FDA is expected to publish an amendment to its Sunscreen Monograph on OTC sunscreen products later this year. Some marketers believe the new monograph will mean more work for them in reformulating and relabeling. Others could also mean more expense.

But is the impending change really something to fear? Executives at Uniqema, a company that has been far from reigning in marketers, say the monograph will open doors to new and creative sun care formulations.

"At the moment, formulators are limited in how they can use sunscreens. Those in the U.S. who currently use organic sunscreens such as avobenzone are not allowed to combine that ingredient with inorganic sunscreens, such as titanium dioxide," pointed out Julian Hewitt of Uniqema.

Blending organic and inorganic sunscreens would not only allow for more creativity but would make formulation much less expensive. "A range of studies has indicated that organic formulations can achieve lower cost-in-use with combinations of organic and inorganic sunscreens," Mr. Hewitt said.

Putting organics with inorganics is nothing new; according to Mr. Hewitt, European marketers have been doing it for years. "Sunscreen formulators in Europe have been combining organic with inorganic sunscreens very successfully for the past several years," he said. "Synergies with zinc oxide and titanium dioxide have been found when they are used in combination with organic actives. European formulators find this relatively easy to obtain high SPF factors for beach wear products when working with an extended list of sunscreen choices."

Uniqema already offers such choices to European marketers, and the company expects to look forward to the day that U.S. formulators are granted the same flexibility.

Later this year, Uniqema will be calling on customers in the U.S. who want to see a broader range of formulating options as they plan for the next series of beach wear care products. Uniqema hopes these facts will help dispel the darkness around the mysterious monograph. "Major suppliers of inorganic sunscreens, such as Uniqema, see the new monograph as expanding the choices formulators will have in selecting sunscreens," Mr. Hewitt said.

Post-Sun: Go Natural

When it comes to after-sun formulations, natural ingredients remained popular last year. Natural ingredients also attract customers who are looking to extend, maintain or soften a tan. If you're wondering just what a "natural" or chemical-free sunblock is, consider many marketers are touting micronized zinc oxide as natural. This new definition is reaching a broader consumer base.

Fruits & Passion is in the process of launching Body Butters, two of which are meant for skin that has been exposed to the sun. The company offers Monoi Body butter and Cocoa Body butter. The vegetable butter portion makes up 10% of each of these products, company executives said.

"Monoi butter has long been used in Tahiti by the natives to prepare and protect hair and skin before going out in the sun," said Ms. Mathé. "Cocoa butter is also known for allowing the skin to tan evenly and for prolonging a tan afterward."

Fruits & Passion also offers an After-Sun Lip balm, After-Sun Regenerating butter and Neutralizing lotion. "Our sun care line is formulated with chamomile, aloe vera and West Indian cherry extracts, allantoin, mango butter and almond and macadamia oils to deeply moisturize the skin and reduce the risks of pre-



Banana B
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Summer

Ms. Mathé said.

Jason Natural Products has been a big name in botanicals for years. This year the company launches two new chemical-free sun blocks and is also relaunching its Facial Block w/ SPF 20.

"Chemical Free Sun Block SPF 30+ is a highly protective, chemical-free sun block cream for people with sensitive skin or chemical sensitivities," said Diana Wang, director of marketing, Jason Natural Products. The product contains micronized titanium dioxide and zinc oxide for UV protection. It also contains chamomile and marigold extracts to soothe and calm the skin. It is hypo-allergenic and free of chemical sunblocks, parabens and fragrance.

Jason also offers Sunbrellas for effective, natural sun protection. "Jason formulates all products with the most gentle, pure and natural botanicals from around the world, free of parabens and harmful chemicals," Ms. Wang said. "Sunbrellas also offer gentle, effective and easy-to-use sun protection for people who have sensitive skin or chemical sensitivities."

She added that natural sun protection can offer similar protection to chemical-based products. "Natural sunscreens can be as effective as mainstream products, but also offer botanical benefits," she said. "Instead of mineral oils, lanolin and paraffin waxes, natural sun protectors are made with natural oils and botanicals to moisturize and soothe skin."

Jason executives said sun care trends are shifting fast toward individual protection for different parts of the body. "In the past, people have just thought of 'sun block' and used a single product for all of their exposure and protection needs," said Ms. Wang.

Try a Little Tenderness

Ms. Wang of Jason added that the natural trend works well when protecting children from the hazards of the sun, as children's skin tends to be more sensitive than adult skin. "Since children's sensitivities are on the rise, it is important to have sunscreens specially formulated with gentle ingredients made for children's skin and sensitive skin," she pointed out.

Other marketers agree. Breeze Products, Largo, FL, created Crazy Island, with lotion and spray for the younger salon-tanning set—an ever-increasing market, according to industry executives contacted by Happi.

Hawaiian Tropic launched Sun Junk to cater to the tween market. Sun Junk includes a Sunblock stick and SPF 45 Sunblock spray. "Our new Sun Junk products are specific to 8-12 year olds," said Ms. Engler of Hawaiian Tropic. "We added texture and a thermochromic link to the front label to stimulate their touch and sight senses." The Tropical Fusion fragrance line also appeals to tweens, Ms. Engler said.

Children are an important segment of the sun care market because parents teach the lifetime sun care habits, marketers said. This broadens the category because each member of the family can have his or her own sunblock.

"Consumers will purchase several different SPF's for the family," said Ms. Fufidio of B. B. Brown. "Mom may buy a sun care product just for her face, an SPF 50 for her baby and SPF 15 for her kids."

Adults can have sensitive skin, too. Products are being launched to protect, soften and soothe adult skin that needs a little extra babying.

Bonita Springs, FL-based Mexitan Products introduced such new products as SPF 15 Golfers and SPF 15 for Anglers and will shortly introduce a skiing line. But whatever the purpose in choosing sunscreen, gentleness is key, Mexitan executives insist. Therefore, all products are "all natural and chemical-free," a company representative said.

Minneapolis-based Aveda launched Dual Nature Face Protection SPF 15, formulated

derived sunscreens, plant-based antioxidants and a pleasant, organic aroma. "Aveda nature's most protective plants and minerals with organic aromas to create this high-performance skin care product for sun and environmental protection," commented Diana Maranis, product director for Aveda skin and body care. Neutrogena also pampers the skin with new Ultra Hydrating Sunblock SPF 30 and SPF 45. The products include soy and glycerin to help soften the skin, plus broad-spectrum UVA/UVB sun protection. They leave no heavy residue on soft, supple, protected skin, company executives said.

"Many sunscreens...leave a slick, sticky film that no one wants anywhere near their clothes," Neutrogena spokesperson. "Wouldn't you be more likely to use a sunblock daily if it was just as silky and lightweight as your body moisturizer?" Ultra Soft Hydrating Sunblock Neutrogena executives explained.

Face, body, parents, baby—there is a sun care product for every need in today's sun care program. "Consumers are gaining awareness that they don't just need a single sun protection product," said Mr. Mizelle of Sothys. "(This) program must offer different levels of protection based on different levels of exposure, plus pre-sun preparation products and after-sun products."



Hawaiian Tropic launched Sun Junk in fun scents to appeal to younger consumers.

Shun the Sun

For those who want a safer, self-applied glow, self-tanners are popular, though industry experts caution self-tan product users to continue to use sun protection when outside. Self-tanning (usually with the ingredient dihydroxyacetone) darkens the skin but offers no protection. However, it is still safe, according to marketers.

Breeze Products offers products for both suntanning and self-tanning. "I don't think that the wave of health consciousness concerning skin care will continue to grow and that sunless tanning is here to stay," said Mr. Lemle, president of the company.

Self-tanning products tend to take two or more hours to show results, necessitating a little surface "boost" of color, Mr. Lemle said. "I favor bronzers," he observed. "People like to receive the gratification of instantaneous color."

Breeze has taken sunless airbrush booths to a new level, according to Breeze executives. The company now offers more than 50 different solutions for tanning booths. "We also offer new Booster drop-in solutions of intensity which can be applied to the solution according to the requirements," said Mr. Lemle.

Banana Boat executives also see a huge demand for self tanning, whether in a salon or at home. "We tested our Summer Color (self-tanning) line with consumers, and they absolutely loved it," revealed Ms. Fufidio of the company. "They love the fragrance, which is a difficult thing to overcome, as most sunless products smell terrible. Consumers also like the quick application foam."

Coppertone got in on the foam-application trend too; the company developed the new Summer Sunless tanning foam. "It's the same dual-chambered formula that contains sunscreen on one side and the tanning agent on the other, but in a foam form," said Mr. Concannon. "It dries in just five minutes and is available next month in Light/Medium and Medium/Dark formulas."

Executives at Sothys agreed that self-tanning is no flash in the pan trend. "Self-tanners are very strong with consumers because they give a very natural tan, hydrate and soothe the skin and allow one to be tanned without sun exposure," said Mr. Mizelle. "The improvement is in the application and the results."

making of self tanners has greatly increased their popularity. No more stinky smells, no messy clothing, they're easy to use and the color really is natural looking."

Hot Trends

Application methods, packaging, pleasant feel and smell and superior protection are all in consumers' reach. Where will it go from here?

According to many marketers, educating consumers on sun safety is an ongoing trend in the sun care industry. They plan on continuing to roll out informational packages and ads on the seriousness of sun care, and just how much protection a person needs.

"Consumers need to know how much sunscreen is really needed to fully cover the whole body," pointed out Ms. Wang of Jason Natural Products. "Typically, one ounce is needed to cover the whole body. So if the container is four ounces, they should know that this is only enough for four applications." In addition, "We need to reapply sunscreen every two hours or more after swimming or sweating," Ms. Wang said.

More frequent use would mean more product purchases—which is good news for marketers. This is due to the fact that sun care sales have begun to rise at last, and sun care marketers see a very bright future.

Looking for a new ingredient to incorporate into your sun care product? A list of them is on p. 94 in the print version of Happi.

Return