

The Skin Whitening Market as it Goes Global

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Anti-agers, skin whitening, US\$m, 2014



1. China

\$618.8m

2. Thailand

\$432.2m

3. Taiwan

\$334.0m

Source: Euromonitor International

Face masks, skin whitening, US\$m, 2014



1. China

\$828.6m

2. Taiwan

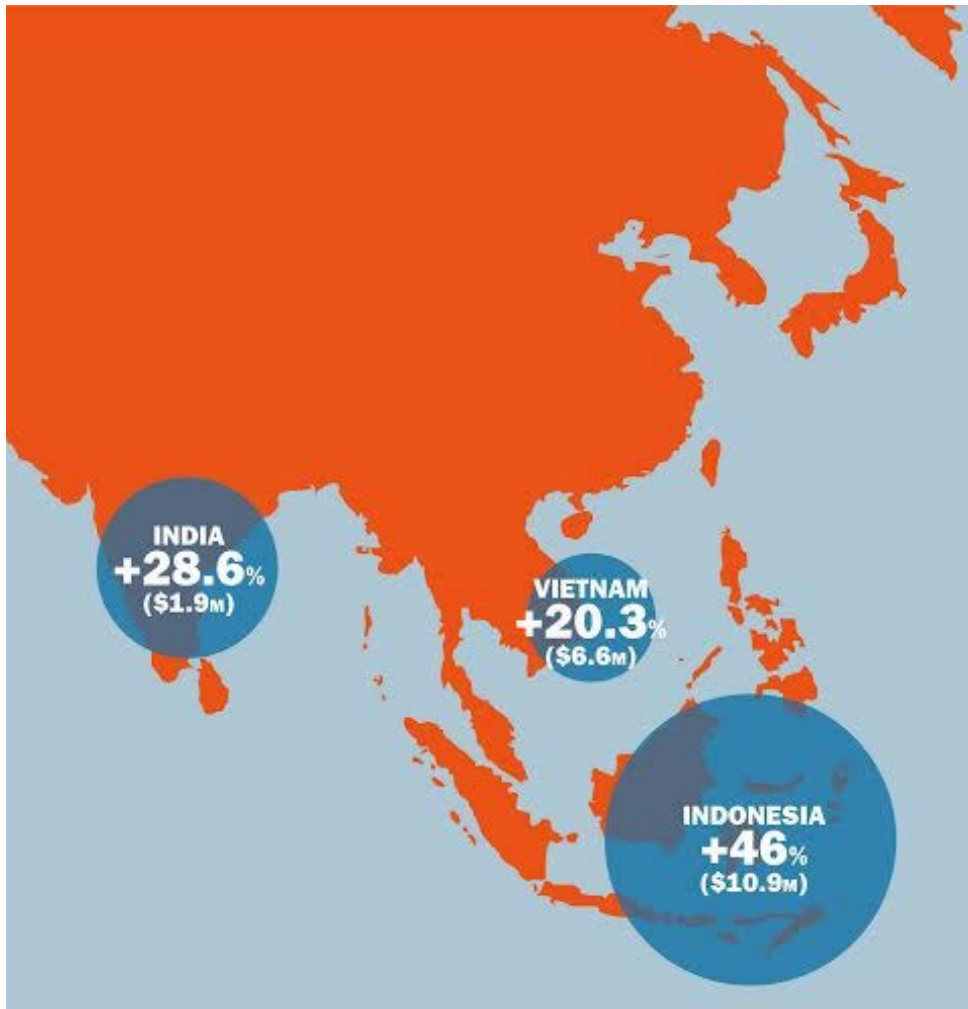
\$96.7m

3. Japan

\$80.8m

*Source: Euromonitor
International*

Anti-agers, skin whitening, % growth, 2013-14



1. Indonesia

+46%
[\$10.9m]

2. India

+28.6%
[\$1.9m]

3. Vietnam

+20.3%
[\$6.6m]

*Source: Euromonitor
International*

Face masks, skin whitening, % growth, 2013-14



1. China

+18.5%
[\$828.6m]

2. Vietnam

+18.4%
[\$1.8m]

3. Philippines

+15.5%
[\$1.0m]

Face masks



W.H.P White Hydrating Charcoal Mineral Mask, GDK
(Korea)

Ingredients: Chestnut tree charcoal

Scinic Black Dual Mask Aqua White
(Korea)

Ingredients: Black sesame, black rice, black beans



Face masks



Scinic Black Pearl Hydrogel Mask (Korea)

Ingredients: Caviar and black pearl
extracts

L'Herboflore, Royal Pearl Brightening Mask (Taiwan)

Ingredients: Japanese deep
sea pearl extracts



Carbonated

Too Cool For School, Egg Mousse Pack

(Korea)

Ingredients: Egg yolk and egg white extracts



AmorePacific's Laneige Brightening Sparkling Water Pop Essence

(Korea)

Ingredients: 31% sparkling water – 'carbonic acid massage'



Shuawa Mineral Carbonate Soap

(Japan)

Ingredients: Lava extract, fulvic acid

Nutricosmetics



Fancl White Advance

(Japan)

Ingredients: Hydroxytyrosol,
L-cystine, vitamin C and niacin

Multi-step



**COSRX,
Galactomyces
95 White Power
Essence**
(Korea)
Ingredients: 95%
concentration of
galactomyces

**Lei Lani, Wear
White Face
Whitening
Finisher**
(Korea)
Ingredients:
Licorice root
extract



**Mizon, Special
Solution Good
Night Sleeping
Mask**
(Korea)
Ingredients:
Niacinamide
and mulberry
extracts

Body part segmentation

**Namu, Snail
White Body
Booster**
(Malaysia)
Ingredients:
Snail



**Little baby
Underarm
Cup Cake
Cream**
(Thailand)
Ingredients:
Mulberry
extract and
vitamins A, C,
E and B3

**Hanaka,
Whitening
Sun
Protection
Cream (For
Body)
SPF50+++**
(Taiwan)
Ingredients:
Ascorbyl
glucoside



China

- All the ingredients used in cosmetics need to be listed on the Inventory of Existing Cosmetic Ingredients in China (IECIC) or it may need registration prior to use.
- Cosmetic products that claim skin whitening effects are classified under the category of special-purpose cosmetics. Those products that physically mask pigmentation issues in order to create a skin lightening/whitening effect, need to specifically mention this on the product label.
- **Whitening/lightening products permitted for use:**
- **Vitamins:** Niacinamide (vitamin B3), vitamin C and derivatives
- **Natural Extracts:** Arbutin kojic acid, *Rhodiola rosea* extract, *Glycyrrhiza glabra* extract, *Punica granatum* extract, hydrolyzed conchiolin protein, bisabolol
- **Synthesized raw materials:** SymWhite 377 [INCI: Phenylethyl resorcinol], undecylenoyl phenylalanine.

Taiwan

- Skin whitening products are classified as medicated cosmetics in Taiwan
- The Taiwan FDA classifies some cosmetic products containing certain types of skin whitening ingredients – tranexamic acid and potassium methoxysalicylate – as normal cosmetics
- Some active ingredients also have permitted limits. The maximum level of ascorbyl tetraisopalmitate is 3%
- If a new skin whitening ingredient has been used in the EU, US and/or Japan, the manufacturer must submit relevant standards and maximum levels along with the required registration documents
- However, if a new ingredient has not been used in the EU, US and/or Japan, then technical documents should be provided to the FDA for review.

Japan/Korea/ASEAN

Japan:

- Skin-whitening products are classified as medicated cosmetics (Quasi-drugs)
- The active ingredient used in the products should be approved by Ministry of Health, Labour and Welfare (MHLW).

• **South Korea:**

- The Korean Cosmetic Act was amended in August 2011 to promote the development of new cosmetic ingredients, and the approval procedure for new cosmetic ingredients was abolished. However, safety assessment for cosmetic ingredients is needed
- Skin whitening cosmetics are classified as functional cosmetics. Evidence is needed to substantiate claims and/or advertisements for the products.

• **ASEAN:**

- ASEAN mainly follows the EU cosmetic regulation. Does not specifically mention skin whitening products.

Europe

**Elemis, White
Brightening
System, Even
Tone Lotion
(UK)**
Ingredients:
Daisy, sophora
and kiwi extracts



**La Prairie, White
Caviar
Illuminating
Moisturizing
Cream
(Switzerland)**
Ingredients:
Licorice extract,
Swiss garden cress
sprout



**Bioderma, White
Objective H₂O
(France)**
Ingredients:
Hexapeptide 2,
lysine azelate

USA - hydroquinone

- 1982: A 'tentative final monograph' for OTC Skin Bleaching Drug Products – issued by US Food and Drug Administration (FDA) – yet to be finalised
- Hydroquinone only GRASE skin bleaching drug – can be used at a maximum of 2% in OTC but at 4% in prescription only products
- 2006: FDA issued a Proposed Rule to reclassify hydroquinone as non-monograph – significant new data on the safety of hydroquinone, specifically “some evidence” or carcinogenicity in rats and mice when administered orally. Also proposed a withdrawal of the 'tentative final monograph'.
- Recommended that additional studies should be conducted by the National Toxicology Program (NTP) and/or industry in order to determine if there is a risk to humans from the use of hydroquinone.
- 2009: FDA's nomination of hydroquinone was reviewed at a public meeting of the NTP Board of Scientific Counselors, at which point the nomination was approved with the following proposed studies: Comparative metabolism studies in rats and mice by the oral and dermal routes; Reproductive toxicity study by the oral route in rats and mice; Dermal carcinogenicity studies of hydroquinone in mice and rats.

USA



Olay Regenerist Luminous tone perfecting treatment (USA)
Ingredients:
Niacinamide

Rx for brown skin (USA)
Ingredients:
“Peptides, botanicals and natural ingredients”



Paula's Choice, Resist Triple Action Dark Spot Eraser 7% AHA Lotion (USA)
Ingredients:
Hydroquinone,

USA

SOKOGLAM!

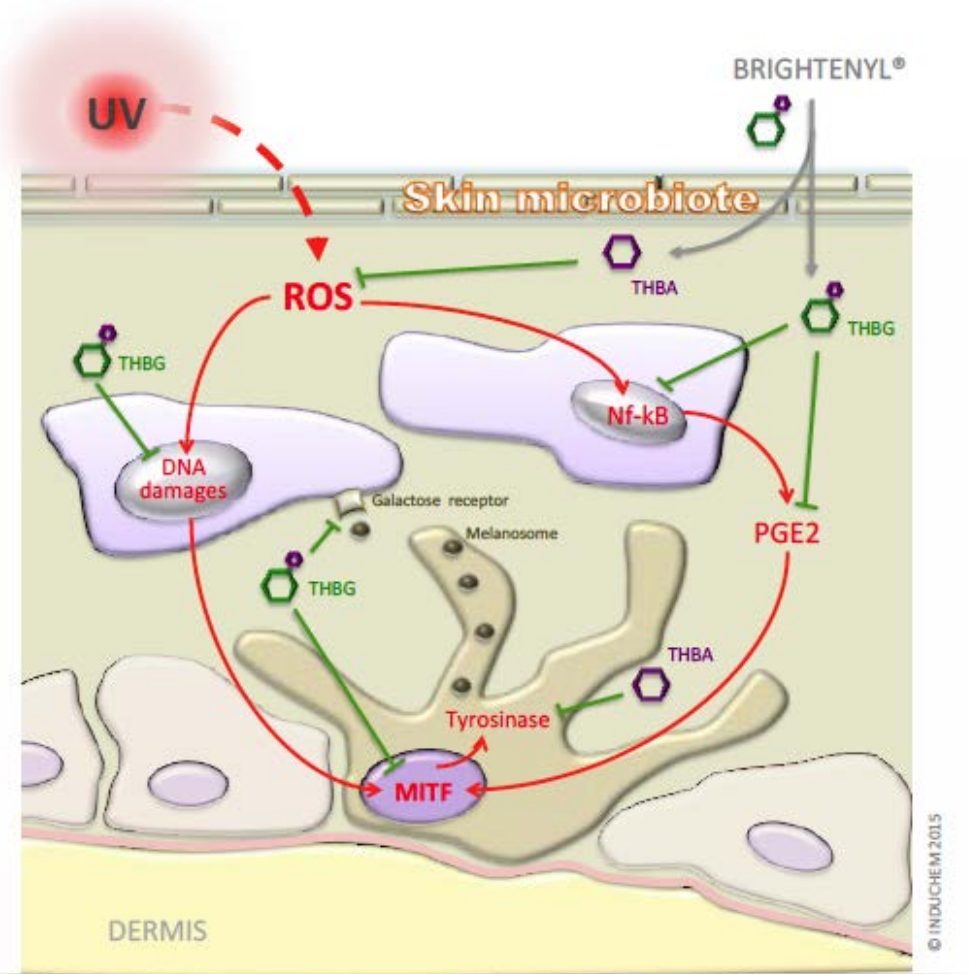


PEACH AND LILY



Brightenyl – Induchem

- Works in conjunction with microflora on the skin
- Trihydroxybenzoic acid [THBA] plus glucose branch = THBG. Once on the skin, certain microflora cleave this glucose branch, reverting it back to THBA
- It is claimed to work on different pathways: Inhibits UV-induced ROS production; UV-induced DNA damage; the expression of MITF; the expression of PEG2; controls the Nf-kB pathway; saturates galactose receptors.

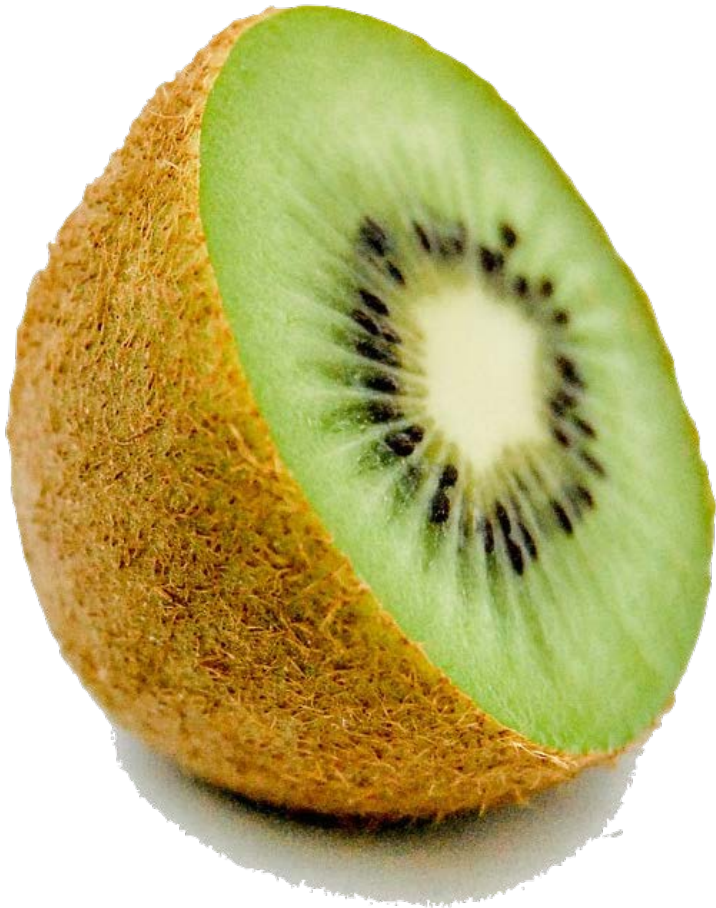


BRIGHLETTE – Lipotec

- In vivo, a 2% brightlette cream x2 day for 8 weeks = 61.1% reduction in melanin content of dark spots; shrinking of hyperpigmented areas by 6.9%; and 12.7% reduced contrast between dark spots and unaffected skin
- Multi-level approach. Works on MITF by down-regulating the activating endothelin-1 and WNT-1 receptors on the melanocyte surface
- Reduces melan-A – one of two key proteins involved in melanosome maturation
- Finally, it inhibits the transfer of melanosomes filled with melanin from the 'arms' of the melanocyte to keratinocytes.



Gatuline Spot-Light – Gattefossé



- Derivative of *Sophora flavescens* and kiwi fruit – extracted using a targeted technique to optimise the concentration of two key molecules sophoraflavanone G and matrine
- Targets the causes of age spots on both epidermal and dermal levels – 90% of panelists confirmed decreased visibility of age spots
- In the epidermis = strong inhibition of tyrosinase and reduction of transfer of melanin to keratinocytes
- Accelerates the skin's natural desquamation process

Thank you!

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