

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

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Cosmeceuticals

US Industry Study with Forecasts for **2012 & 2017**

Study #2413 | October 2008 | \$4700 | 339 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Overview	5
Demographic Trends	9
Consumer Spending	12
Physicians	14
Spa Industry Outlook	16
Dermatological Conditions	18
Hair Loss	20
Skin Conditions	21
Cosmetic & Toiletry Market	23
Skin Care Products	27
Hair Care Products	31
Oral Hygiene Products	33
Other Cosmetics & Toiletries	36
Cosmetic Surgery Procedures	40
Dermatological Pharmaceutical Overview	43
Nanotechnology in Cosmeceuticals	44
Regulatory Considerations	46
Historical Market Trends	49
International Activity & Foreign Trade	51

COSMECEUTICAL PRODUCTS

General	54
Skin Care Cosmeceuticals	58
Age-Defying Products	61
Types	65
Applications	69
Acne Preparations	71
Professional Acne Preparations	72
Over-The-Counter Acne Preparations	74
Medicated Lotions	75
Sun Care Products	77
Other Skin Care Products	80
Hair Care Cosmeceuticals	82
Hair Growth Products	84
Finasteride-Based	86
Minoxidil-Based & Other	87
Anti-Dandruff Shampoos	90
Injectable Cosmeceuticals	92
Botulinum Toxin-Based	94
Tissue Fillers	97
Hyaluronic Acid	98
Other Tissue Fillers	102
Collagen	102
Calcium Hydroxylapatite	105

Synthetic Polymers	106
Other Injectables	107
Lip Care Products	110
Tooth Whiteners	113
Professional Tooth Whiteners	115
Over-The-Counter Tooth Whiteners	117
Other Cosmeceutical Products	119
Ingestibles	120
Color Cosmetics	123
Anti-Cellulite/Body Slimming	124
Breast/Penis Enhancers	125
Hair Growth Retardants	126
Nail, Hand & Foot	127
All Other Cosmeceutical Products	128

COSMECEUTICAL CHEMICALS

General	130
Antioxidants	133
Vitamin A Compounds	135
Vitamin E Compounds	137
Vitamin C Compounds	138
Coenzyme Q10 & Other	140
Sunscreens	142
Organic	145
Inorganic	147
Acids	148
Alpha Hydroxy Acids	149
Other Acids	151
Enzymes	153
Botulinum Toxin	155
Other Enzymes	157
Proteins	159
Collagen	160
Amino Acids	162
Elastin	164
Other Proteins	165
Botanicals	167
Other	170
Finasteride	171
Minoxidil	172
All Other	172

INDUSTRY STRUCTURE

General	176
Market Share	180
Cosmeceutical Products	181
Cosmeceutical Chemicals	188
Marketing & Distribution	193

Manufacturing	195
Competitive Strategies	196
Research & Development	198
Cooperative Agreements	200
Acquisitions & Divestitures	205

COMPANY PROFILES

Active Organics	210
Allergan Incorporated	212
Arch Chemicals	217
Ashland Incorporated	220
Avon Products	221
BASF SE	225
Bayer AG	228
Beiersdorf AG	229
Ciba Specialty Chemicals	233
Clariant International	235
Cognis Deutschland	237
Colgate-Palmolive Company	241
Croda International	244
Desert Whale Jojoba	249
DuPont (EI) de Nemours	250
Eastman Chemical	252
Estee Lauder	253
Evonik Industries	261
Indena SpA	264
International Specialty Products	265
Janson Beckett	267
Johnson & Johnson	269
Kao Corporation	276
Kyowa Hakko Kogyo	279
L'oreal SA	281
Medicis Pharmaceutical	290
Merck & Company	294
Murad Incorporated	295
Novartis AG	298
Obagi Medical Products	299
PerriconeMD Cosmeceuticals	303
Pfizer Incorporated	305
Procter & Gamble	306
Rhodia SA	311
Roche Holding	313
Royal DSM	314
Schering-Plough Corporation	316
SkinMedica Incorporated	318
Symrise AG	321
Unilever Group	324
Other Companies Mentioned in Study	327

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table3

MARKET ENVIRONMENT

1 Macroeconomic Indicators9
 2 Population & Households 12
 3 Personal Consumption Expenditures..... 14
 4 Physicians 16
 5 Spa Facilities by Type 18
 6 Selected Aesthetic-Related Conditions..... 19
 7 Cosmetic & Toiletry Supply & Demand 26
 8 Skin Care Product Supply & Demand 31
 9 Hair Care Product Supply & Demand 33
 10 Oral Hygiene Product Supply & Demand 36
 11 Other Cosmetic & Toiletry Product Supply & Demand.... 40
 12 Cosmetic Surgery Procedures.. 43
 13 Dermatological Pharmaceutical Supply & Demand 44
 14 Cosmeceutical Chemical Market, 1997-2007 50

COSMECEUTICAL PRODUCTS

1 Cosmeceutical Product Demand 57
 Cht Cosmeceutical Product Demand by Type, 2007 58
 2 Skin Care Cosmeceutical Product Demand 60

Cht Skin Care Cosmeceutical Product Demand by Type, 2007 61
 3 Age-Defying Cosmeceutical Product Demand 65
 4 Acne Preparation Cosmeceutical Product Demand 72
 5 Medicated Lotion Cosmeceutical Product Demand 77
 6 Sun Protection Cosmeceutical Product Demand 80
 7 Other Skin Care Cosmeceutical Product Demand 82
 8 Hair Care Cosmeceutical Product Demand 84
 9 Hair Growth Cosmeceutical Product Demand 86
 10 Anti-Dandruff Cosmeceutical Product Demand 92
 11 Injectable Cosmeceutical Product Demand 94
 12 Botulinum Toxin Cosmeceutical Product Demand 96
 13 Tissue Filler Cosmeceutical Product Demand 98
 14 Other Injectable Cosmeceutical Product Demand 110
 15 Lip Care Product Demand 113
 16 Tooth Whitener Demand..... 115
 17 Other Cosmeceutical Product Demand 120

COSMECEUTICAL CHEMICALS

1 Cosmeceutical Chemical Demand 132

Cht Cosmeceutical Chemical Demand by Type, 2007 133
 2 Antioxidants: Cosmeceutical Applications 135
 3 Sunscreens: Cosmeceutical Applications 145
 4 Acids: Cosmeceutical Applications 149
 5 Enzymes: Cosmeceutical Applications 155
 6 Proteins: Cosmeceutical Applications 160
 7 Botanicals: Cosmeceutical Applications 170
 8 Other Cosmeceutical Chemical Demand 171

INDUSTRY STRUCTURE

1 US Cosmeceutical Product & Chemical Sales by Company, 2007 178
 Cht US Cosmeceutical Product Market Share by Company, 2007 183
 Cht US Cosmeceutical Chemical Market Share by Company, 2007 189
 2 R&D Spending Patterns: Selected Cosmeceutical Suppliers 200
 3 Selected Cooperative Agreements 202
 4 Selected Acquisitions & Divestitures..... 207

Growth will be driven by an aging populace seeking to maintain the appearance of youth, coupled with an increasingly competitive work force, new products and astute marketing.

US demand to rise 7.4% annually through 2012

Demand for cosmeceutical products is expected to increase 7.4 percent per annum to \$8.2 billion in 2012, driven by an aging populace seeking to maintain the appearance of youth in an image-conscious society. This, coupled with an increasingly competitive work force, a steady stream of new and technologically advanced products and the continuation of astute marketing, will bode well for cosmeceuticals. Due to America's obsession with a youthful appearance, the cosmeceuticals target market continues to expand beyond the traditional 45 years and older demographic to include much younger individuals.

Botanicals, enzymes, acids among best opportunities

The value of chemicals used in cosmeceutical products is expected to advance 7.7 percent per year through 2012, with gains spurred by the use of new, value-added active ingredients in product formulations. Antioxidants will remain the largest category, with above-average gains promoted by their incorporation in both topical and ingestible formulations. Botanicals and enzymes, as well as hyaluronic acid, amino acids and peptides, are among the active ingredients set for favorable opportunities in a variety of cosmeceutical products. For example, enzymes -- particularly botulinum toxin -- and hyaluronic acid will post strong advances, primarily based on their use in dermal filler injectables. In



addition, hyaluronic acid is finding greater use in many over-the-counter products, ranging from age-defying moisturizers to ingestibles.

Injectables, skin care products to grow fastest

Injectables and skin care products will register the fastest growth. Growth in the injectables sector boomed with the introduction of BOTOX (Allergan) in the 1990s when it was used for "off label" wrinkle treatments. Further growth was achieved with the subsequent introduction of hyaluronic acid injectables. Growth in injectables will benefit from the ability of these products to provide quick wrinkle reduction without recovery time.

Further propelling gains will be the FDA approval of new injectables -- such as calcium hydroxylapatite -- that provide long-lasting results.

In addition to achieving above-average growth, skin care products will remain the largest product category, set to account for 63 percent of all cosmeceutical product demand in 2012. Age-defying products will achieve above-average growth, with gains driven by a highly receptive, fast-expanding group of middle-aged consumers, as well as a growing number of younger individuals, who want to redress or prevent visible damage to the skin caused by aging, ultraviolet radiation and other environmental stressors.

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Sample Text, Table & Chart

COSMECEUTICAL PRODUCTS

Tissue Fillers

Demand for tissue fillers is expected to rise 10.8 percent to \$425 million in 2012, driven by the continued market penetration and the continued market penetration. Application of tissue fillers will result in more aggressive growth of the growing number of first time users. Tissue fillers are expected to require no allergic reactions and are administered in less than one hour, providing a faster procedure than currently approved tissue fillers.

SAMPLE TEXT

Tissue fillers are composed of bovine collagen, processed collagen, compositions of synthetic polymers or microspheres in collagen solutions, hyaluronic acid, silicone oil, and calcium hydroxylapatite. Tissue fillers are commonly used to plump up facial depressions and wrinkles, and are generally applied to the lower half of the face. Tissue fillers are also commonly used in lip augmentation procedures, providing fuller and plumper lips.

Among the tissue fillers, hyaluronic acid and newly FDA approved products are projected to achieve the most rapid gains, especially as more individuals are convinced of the performance advantages hyaluronic acid has over other injectable materials. In addition, market penetration of hyaluronic acid will expand as many new products are poised to gain FDA approval over the next several years. Newer tissue fillers will achieve rapid gains, arising from a small 2007 base, due to greater product availability and expanded marketing campaigns. In addition, many of these newer tissue fillers feature longer lasting effects than established fillers, providing value for individuals looking for more "bang for their buck."

Historically, collagen products dominated the tissue filler market. Collagen's market position dramatically changed when hyaluronic acid

TABLE III-2

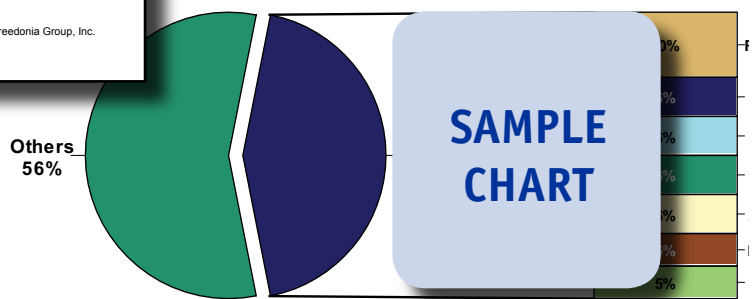
SKIN CARE COSMECEUTICAL PRODUCT DEMAND (million dollars)

Item	1997	2002	2007	2012	2017
Resident Population (million)	265	275	285	295	305
\$ skin cosmeceutical/capita	10	15	20	25	30
Skin Care Cosmeceutical Prdt Demand	2650	4125	5700	7375	9150
By Type:					
Age-Defying Products	1000	1500	2000	2500	3000
Acne Preparations	500	750	1000	1250	1500
Medicated Lotions	250	375	500	625	750
Sun Protection Products	125	187	250	312	375
Other Skin Care Products	625	937	1250	1562	1875
By Market:					
Over-the-Counter	2000	3075	4200	5375	6500
Professional	650	1050	1500	1900	2350
% skin care cosmeceuticals	10	15	20	25	30
Cosmeceutical Product Demand	2650	4125	5700	7375	9150

SAMPLE TABLE

CHART V-2

US COSMECEUTICAL CHEMICAL MARKET SHARE BY COMPANY, 2007 (\$965 million)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE IV-2
ANTIOXIDANTS: COSMECEUTICAL APPLICATIONS
 (million dollars)

Item	1997	2002	2007	2012	2017
Skin Care Cosmeceutical Demand	14			250	
\$ antioxidant/000\$ cosmeceutical					95
Antioxidant Demand					25
Vitamin A Compounds					55
Vitamin E Compounds					90
Vitamin C Compounds					20
Coenzyme Q10 & Other					30
% antioxidant					3
Cosmeceutical Chemical Demand					70



COMPANY PROFILES

PerriconeMD Cosmeceuticals
 639 Research Parkway
 Meriden, CT 06450
 203-379-0726
 http://www.perricone.com

Annual Sales:
 Employment:
 Key Products: supplements

PerriconeMD Cosmeceuticals came from NV Perricone MD Limited in April 2008, manufactures and distributes a range of skin care cosmeceuticals and dietary supplements through authorized retailers, therapeutic spas and other outlets. The Company is privately held.

The Company's skin care cosmeceuticals include eye care, face care, lip care, and body care products. Eye care cosmeceuticals from PerriconeMD Cosmeceuticals, which are formulated with 2-dimethylaminoethanol (DMAE), encompass ADVANCED EYE AREA THERAPY, CERAMIC EYE SMOOTHER and EYE AREA CONTOUR products. These cosmeceuticals are designed to diminish the appearance of dark circles, puffiness and fine lines around the eyes. Specifically, the Company's ADVANCED EYE AREA THERAPY lotion contains alpha lipoic acid, DMAE, vitamin C ester, sodium hyaluronate, borage seed oil, rice bran oil and tocopherol.

PerriconeMD Cosmeceuticals' face care cosmeceuticals encompass a variety of cleanser, toner, serum, moisturizer, mask and sunscreen products formulated with DMAE, alpha lipoic acid, sodium

SAMPLE PROFILE

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"Demand for vitamin E compounds in cosmeceuticals is projected to expand 9.0 percent per annum to \$200 million in 2012. Demand will benefit from the vitamin's role as a secondary ingredient of broad-based age-defying preparations, where the vitamin is valued as a moisturizing agent and a vehicle for delivery of active anti-aging ingredients. In addition, demand will be stimulated by positive consumer perceptions of the vitamin, based largely on outdated information regarding its skin healing actions (and even its supposed aphrodisiac properties) and marketing efforts in the dietary supplements sector, where vitamin E has proven to be an important component in ..."

--Section IV, pg. 137

OTHER STUDIES

Cardiac Implants

US demand for cardiac implants will grow 8.8% yearly through 2012, rebounding from a slowdown caused by product recalls and safety controversies. Pacing devices will remain the top-selling group, with gains led by CRT devices. Stents and accessories will be the fastest growing segment, driven by improved designs with reduced risk of complications. This study analyzes the \$10.7 billion US cardiac implant industry, with forecasts for 2012 and 2017 by type and indication. It also evaluates market share and profiles industry players.

#2398 09/2008..... \$4500

Cosmetic Surgery Products

US cosmetic surgery product demand will grow 8.4% yearly through 2012, driven by an ongoing desire for a youthful appearance and an aging population. Less invasive procedures (e.g., injections, laser dermal resurfacing) will grow the fastest. Implants and other surgical products will do well where there are no alternatives. This study analyzes the \$1.9 billion US cosmetic surgery product industry, with forecasts for 2012 and 2017 by procedure, product and raw material. It also evaluates market share and profiles industry players.

#2389 09/2008..... \$4600

Orthopedic Implants

US orthopedic implant demand will grow 8.9% annually through 2012. Knees and hips will continue to claim most reconstructive joint replacements. New technologies and surgical techniques will boost demand for spinal implants. Orthobiologics will benefit from breakthroughs in biotechnology and nanotechnology. This study analyzes the \$14.3 billion US orthopedic implant industry, with forecasts for 2012 and 2017 by product and market. It also evaluates company market share and profiles industry players.

#2372 07/2008..... \$4500

Enzymes

US demand for enzymes will grow 6% annually through 2012. Advances will be led by continued rapid expansion in the fuel ethanol segment of the starch processing enzyme market, as well as strong growth in the large pharmaceutical and smaller biocatalyst and pulp and paper markets. Animal feed will also contribute to gains. This study analyzes the \$1.9 billion US enzyme industry, with forecasts for 2012 and 2017 by market and product. It also evaluates market share and profiles industry competitors.

#2351 06/2008..... \$4600

Dental Products & Materials

US demand for dental products will rise 4.5% per year through 2012, aided by favorable population trends and continued interest in cosmetic dentistry. More concern about overall good health will provide added opportunities for mouthwash/dental rinses, sealants, fluoride treatments and other products. This study analyzes the US dental product and material industry, with forecasts for 2012 and 2017 by product and raw material. It also evaluates company market share and profiles leading industry competitors.

#2313 03/2008..... \$4500

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