



[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](#)

[Order Form & Corporate  
Use License 7](#)

[About Freedonia,  
Custom Research,  
Related Studies, 8](#)

# Cosmeceuticals

---

US Industry Study with Forecasts for **2015 & 2020**

---

Study #2758 | July 2011 | \$4900 | 376 pages

---

[www.freedoniagroup.com](http://www.freedoniagroup.com)



**The Freedonia Group**

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: [info@freedoniagroup.com](mailto:info@freedoniagroup.com)

## Table of Contents

### EXECUTIVE SUMMARY

### MARKET ENVIRONMENT

General .....	4
Macroeconomic Overview.....	5
Demographic Trends .....	9
Consumer Spending .....	13
Physicians.....	16
Spa Industry Outlook.....	18
Aesthetic/Dermatological Conditions.	21
Hair Loss .....	22
Skin Conditions.....	24
Cosmetic & Toiletry Market .....	26
Skin Care Products.....	29
Hair Care Products.....	33
Oral Hygiene Products .....	35
Other Cosmetics & Toiletries.....	38
Professional Cosmetic Procedures.....	42
Dermatological Pharmaceutical	
Overview .....	46
Nanotechnology in Cosmeceuticals ...	47
Regulatory Considerations .....	49
Historical Market Trends.....	53
International Activity & Foreign Trade	55

### COSMECEUTICAL PRODUCTS

General .....	59
Skin Care Cosmeceuticals.....	63
Age-Defying Products.....	66
Types.....	71
Applications .....	75
Acne Preparations .....	77
Professional Acne Preparations ...	79
Over-the-Counter	
Acne Preparations.....	82
Medicated Lotions .....	83
Sun Care Products .....	85
Other Skin Care Products .....	88
Injectable Cosmeceuticals .....	90
Botulinum Toxin-Based .....	93
Tissue Fillers .....	96

Hyaluronic Acid.....	98
Other Tissue Fillers .....	100
Other Injectables .....	105
Hair Care Cosmeceuticals.....	108
Hair Growth Products .....	110
Finasteride-Based .....	112
Minoxidil-Based .....	113
Other.....	115
Anti-Dandruff Shampoos.....	116
Lip Care Products .....	118
Tooth Whiteners .....	121
Professional Tooth Whiteners .....	123
Over-the-Counter Tooth Whiteners	125
Other Cosmeceutical Products .....	126
Ingestibles.....	127
Color Cosmetics.....	130
Anti-Cellulite/Body Slimming .....	131
Breast/Penis Enhancers.....	132
Hair Growth Retardants .....	133
Nail, Hand & Foot .....	134
All Other Cosmeceutical Products ..	134

### COSMECEUTICAL CHEMICALS

General .....	136
Antioxidants .....	139
Vitamin E Compounds .....	141
Vitamin A Compounds .....	142
Vitamin C Compounds .....	144
Coenzyme Q10 & Other.....	146
Sunscreens.....	148
Organic.....	151
Inorganic.....	152
Acids .....	153
Alpha Hydroxy Acids .....	154
Other Acids .....	156
Enzymes .....	159
Botulinum Toxin.....	161
Other Enzymes .....	163
Proteins .....	165
Collagen .....	166
Amino Acids .....	168
Elastin.....	170
Other Proteins .....	171

Botanicals .....	173
Other Cosmeceutical Chemicals.....	176
Finasteride.....	177
Hyaluronic Acid.....	178
Minoxidil .....	179
All Other.....	180

### INDUSTRY STRUCTURE

General .....	182
Market Share .....	186
Cosmeceutical Products .....	187
Cosmeceutical Chemicals .....	193
Marketing & Distribution .....	197
Manufacturing .....	200
Competitive Strategies.....	201
Research & Development.....	204
Cooperative Agreements.....	205
Acquisitions & Divestitures.....	210

### COMPANY PROFILES

Active Organics.....	215
Allergan Incorporated.....	217
Arch Chemicals .....	224
Ashland Incorporated .....	228
Avon Products .....	229
BASF SE.....	233
Bayer AG .....	241
Beiersdorf AG .....	243
Clariant International .....	248
Colgate-Palmolive .....	249
Croda International .....	252
Desert Whale Jojoba.....	259
DuPont (EI) de Nemours.....	261
Eastman Chemical .....	263
Estée Lauder .....	265
Evonik Industries .....	275
Indena SpA .....	279
International Specialty Products.....	280
Janson Beckett.....	283
Johnson & Johnson.....	284
Kao Corporation .....	293
Kyowa Hakko Kirin .....	296

(continued on following page)

[Click here to purchase online](#)

## Table of Contents

### COMPANY PROFILES

(continued from previous page)

L'Oréal SA .....	299
Medicis Pharmaceutical.....	311
Merck & Company.....	315
Merz GmbH .....	318
Murad Incorporated.....	320
Novartis AG.....	325
Obagi Medical Products.....	327
PerriconeMD Cosmeceuticals .....	330
Pfizer Incorporated .....	333
Procter & Gamble.....	336
Rhodia SA.....	341
Roche Holding.....	342
Royal DSM NV.....	343
Sanofi-Aventis .....	347
SkinMedica Incorporated.....	350
Symrise AG.....	353
Unilever Group .....	356
Additional Companies Involved in the Cosmeceuticals industry.....	361

## List of Tables/Charts

### EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

### MARKET ENVIRONMENT

1 Macroeconomic Indicators .....	9
2 Population & Households.....	13
3 Personal Consumption Expenditures .....	16
4 Physicians.....	18
5 Spa Facilities.....	21
6 Selected Aesthetic & Dermatological Conditions .....	22
7 Cosmetic & Toiletry Supply & Demand.....	28
8 Skin Care Product Supply & Demand.....	33

9 Hair Care Product Supply & Demand.....	35
10 Oral Hygiene Product Supply & Demand.....	38
11 Other Cosmetic & Toiletry Product Supply & Demand.....	42
12 Professional Cosmetic Procedures	46
13 Dermatological Pharmaceutical Supply & Demand.....	47
14 Cosmeceuticals Market, 2000-2010.....	55

### COSMECEUTICAL PRODUCTS

1 Cosmeceutical Product Demand..	62
Cht Cosmeceutical Product Demand by Type, 2010.....	63
2 Skin Care Cosmeceutical Product Demand.....	65
Cht Skin Care Cosmeceutical Product Demand by Type, 2010.....	66
3 Age-Defying Cosmeceutical Product Demand.....	71
4 Acne Preparation Cosmeceutical Product Demand.....	79
5 Medicated Lotion Cosmeceutical Product Demand.....	85
6 Sun Protection Cosmeceutical Product Demand.....	88
7 Other Skin Care Cosmeceutical Product Demand.....	90
8 Injectable Cosmeceutical Product Demand.....	93
9 Botulinum Toxin Cosmeceutical Product Demand.....	96
10 Tissue Filler Cosmeceutical Product Demand.....	98
11 Other Injectable Cosmeceutical Product Demand.....	108
12 Hair Care Cosmeceutical Product Demand.....	110
13 Hair Growth Cosmeceutical Product Demand.....	112

14 Anti-Dandruff Cosmeceutical Product Demand.....	118
15 Lip Care Cosmeceutical Product Demand.....	121
16 Tooth Whitener Cosmeceutical Product Demand.....	123
17 Other Cosmeceutical Product Demand.....	127

### COSMECEUTICAL CHEMICALS

1 Cosmeceutical Chemical Demand.....	138
Cht Cosmeceutical Chemical Demand by Type, 2010.....	139
2 Antioxidants: Cosmeceutical Applications.....	141
3 Sunscreens: Cosmeceutical Applications.....	150
4 Acids: Cosmeceutical Applications.....	154
5 Enzymes: Cosmeceutical Applications.....	161
6 Proteins: Cosmeceutical Applications.....	166
7 Botanicals: Cosmeceutical Applications.....	176
8 Other Cosmeceutical Product Demand.....	177

### INDUSTRY STRUCTURE

1 US Cosmeceuticals Sales by Company, 2010.....	184
Cht US Cosmeceutical Product Market Share by Company, 2010 .....	188
Cht US Cosmeceutical Chemical Market Share by Company, 2010 .....	194
2 R&D Spending Patterns: Selected Cosmeceutical Suppliers .....	205
3 Selected Cooperative Agreements.....	208
4 Selected Acquisitions & Divestitures .....	212

[Click here to purchase online](#)

*Gains will be driven by an aging populace seeking to maintain the appearance of youth, as well as by much younger individuals intending to stave off the first signs of aging.*

## US demand to rise 5.8% annually through 2015

US demand for cosmeceutical products is expected to increase 5.8 percent per annum to \$8.5 billion in 2015, driven by an aging populace seeking to maintain the appearance of youth. The target market for cosmeceuticals continues to expand beyond the traditional 45-years-and-older demographic to include much younger individuals, as the national obsession with youth continues and focus shifts to products intended to stave off the first signs of aging. Further supporting growth will be an increasingly competitive employment environment, a steady stream of new and technologically advanced product introductions, and the continuation of astute consumer-targeted marketing.

## Antioxidants, botanicals to offer best prospects in chemicals

The chemicals used in cosmeceutical products provide a competitive advantage by which product manufacturers differentiate their products. The value of chemicals used in cosmeceutical products is expected to advance 6.1 percent per year to nearly \$1.5 billion in 2015, 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 into both topical and ingestible formulations. Botanicals will continue to

## US Cosmeceutical Product Demand (\$6.5 billion, 2010)



Skin Care  
63%

Injectables  
11%

Hair Care 8%

Lip Care 6%

Other Products  
12%

see the fastest gains in demand as consumers continue to favor “natural” products. Fast gains will also be seen for enzymes, particularly botulinum toxin used in injectables.

## Injectables, skin care cosmeceuticals to be fastest growing products

Injectables and skin care products will experience the fastest growth, based on anti-aging benefits. Leading brands such as Allergan’s BOTOX COSMETIC and JUVÉDERM will continue to lead growth in injectables going forward. The first direct competition to BOTOX emerged in 2009 with the Food and Drug Administration’s approval of DYSPORT (Medicis

Pharmaceutical), which will help to reshape the injectables market. Relatively recently-introduced hyaluronic acid-based dermal fillers will see particularly fast growth.

In addition to achieving above-average growth, skin care products will remain the largest cosmeceutical product category through 2015. Age-defying products will achieve the fastest gains in the segment, driven by a highly receptive, expanding group of graying “baby boomers,” who want to redress visible damage to the skin caused by aging, ultraviolet radiation and other environmental stressors, as well as a growing number of younger individuals seeking to prevent signs of aging.

Copyright 2011 The Freedonia Group, Inc.

[Click here to purchase online](#)



## Sample Text, Table & Chart

### COSMECEUTICAL PRODUCTS

#### Medicated Lotions

Demand for medicated lotions (excluding acne preparations) is expected to increase 3.5 percent annually through 2020. Lotions form a group of over-the-counter cosmetics that improve intrinsic skin properties such as moisture retention and texture, but do not provide significant anti-aging benefits. Steady growth in the number of prescriptions provides opportunities for medicated lotions. Continued product development, as some existing formulations are found to be prone to cause side effects. Similar to most skin care cosmeceutical product development efforts involving medicated lotions may focus on new ingredients and formulations that can improve overall quality, extend beneficial actions and/or reduce unwanted side effects.

Medicated lotions are designed to treat a variety of skin conditions including dermatitis, psoriasis and rosacea, and are available as prescription and OTC formulations. Prescriptions include both name brand and generic versions of oral or topical products. The active ingredient specified is dependent on the type of skin condition being treated. Historically, dermatitis was treated with antibiotics, antihistamines, steroids and immune system inhibitors. More recently, however, a new type of barrier repair moisturizer, based on natural lipids, has emerged. These ceramide moisturizers are available OTC and by prescription. Major ceramide moisturizer products include those available over-the-counter, such as Kao's CUREL line, and prescription product ATOPICLAIR (Graceway Pharmaceuticals). For example, CUREL products include lotions and creams formulated to moisturize and prevent dry skin. These products are made using an advanced therapy formula. Representative cosmeceuticals include CUREL SKIN DEFENSE (to relieve symptoms of eczema) and CUREL SENSITIVE SKIN REMEDY lotions. CUREL SENSITIVE SKIN REMEDY lotions, which were launched in 2010, can be applied to relieve dry, itchy skin.

83

Copyright 2011

SAMPLE  
TEXT

TABLE III-1

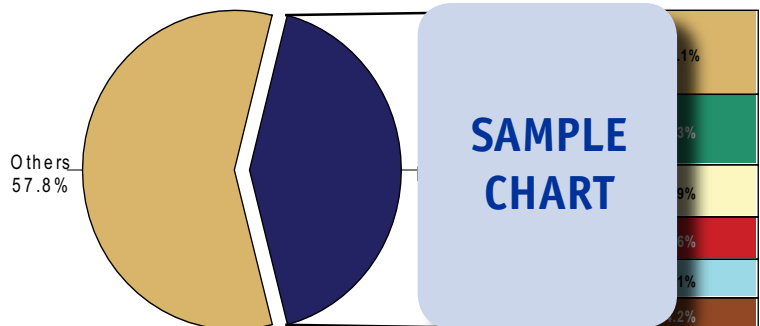
COSMECEUTICAL PRODUCT DEMAND  
(million dollars)

Item	2000	2005	2010	2015	2020
Resident Population (mil persons)	280	290	300	310	320
\$ cosmeceuticals/capita	119	220	310	420	570
Cosmeceutical Product Demand					
By Type:					
Skin Care					
Injectables					
Hair Care					
Lip Care					
Tooth Whitening					
Other					
By Market:					
Over-the-Counter					
Professional					

SAMPLE  
TABLE

CHART V-2

US COSMECEUTICAL CHEMICAL MARKET SHARE BY COMPANY  
(\$1.1 billion, 2010)

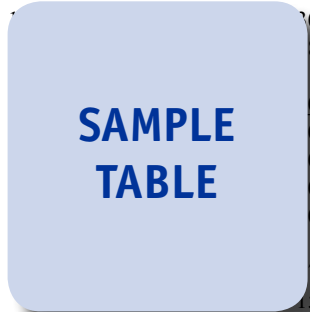


SAMPLE  
CHART

## Sample Profile, Table & Forecast

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

Item	2000	2005	2010	2015	2020
Skin Care Cosmeceutical Demand					
\$ antioxidants/000\$ cosmeceutical					
Antioxidant Demand					
Vitamin E Compounds					
Vitamin A Compounds					
Vitamin C Compounds					
Coenzyme Q10 & Other					
% antioxidants					
Cosmeceutical Chemical Demand					



### COMPANY PROFILES

**SkinMedica Incorporated**  
 5909 Sea Lion Place, Suite H  
 Carlsbad, CA 92010  
 760-448-3600  
 http://www.skinmedica.com

Revenues: \$  
 Employment:

Key Products: cosmeceuticals

SkinMedica is primarily focused on developing, acquiring and commercializing prescription and nonprescription cosmeceutical skin care products that are dispensed by physicians. The Company is privately held.

The Company's skin care products comprise nonprescription and prescription types designed to provide a variety of cosmeceutical benefits. SkinMedica's offerings include cosmeceuticals designed to provide hair growth inhibition, skin lightening, anti-aging, sun protection, acne-fighting and other effects.

**Prescription Cosmeceuticals** -- SkinMedica's prescription cosmeceuticals are marketed under the VANIQA and EPIQUI brand names. VANIQA (eflornithine hydrochloride) cream is reportedly the only US Food and Drug Administration (FDA)-approved prescription product for the reduction of unwanted facial hair in women. This cream, which is applied to the affected area twice daily, is designed to block an enzyme in the hair follicle that is necessary for hair growth. VANIQA is reported to noticeably reduce hair growth and the need for hair removal methods in as little as eight weeks.

350

Copyright 2011 The Freedonia Group, Inc.



"Demand for vitamin E compounds in cosmeceuticals is projected to expand 7.7 percent per annum to \$235 million in 2015, accounting for 42 percent of antioxidant demand in that year. In 2010, vitamin E demand surpassed that for vitamin A for the first time, a position this compound is expected to maintain through the foreseeable future. Demand will benefit from vitamin E's role as a ..."

--Section IV, pg. 141

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or + 1 440.684.9600

FAX: + 1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional \$2600, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

Click here to learn more about the Corporate Use License

ORDER FORM

F-WEB.2758

Cosmeceuticals..... \$4900

Corporate Use License (add to study price) \* + \$2600

Additional Print Copies @ \$600 each \*

Total (including selected option) \$

Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

Bill my company American Express MasterCard Visa

Credit Card #

Expiration Date MM YY

Signature

Name

Title

Company

Division

Street (No PO Box please)

City/State/Zip

Country

Phone Fax

Email

\* Please check appropriate option and sign below to order an electronic version of the study.

Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature

Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add \$2600; one additional user, add \$600; two additional users, add \$1200; three additional users, add \$1800.

Signature

**OTHER STUDIES**

**Biologics**

This study analyzes the US biologics industry. It presents historical demand data (2000, 2005, 2010) and forecasts for 2015 and 2020 by product (monoclonal antibodies, vaccines, hormones, growth factors, immunomodulators, blood and blood products, enzymes, and coagulation factors) and application (e.g., cancer, autoimmune diseases, infectious disease, blood disorders, diabetes, animal health, research, industrial). The study also considers market environment factors, evaluates company market share and profiles industry competitors.

#2792 ..... September 2011..... \$4900

**Excipients**

US excipients demand will advance 3.9 percent yearly through 2015, driven by continued growth in US pharmaceutical production and the increasing importance of excipients in drug formulation. Polymers will remain the top-selling type based on their use as fillers and binders in tablets. Fillers and diluents will remain the leading application and grow the fastest. This study analyzes the \$1.5 billion US excipients industry, with forecasts for 2015 and 2020 by product and application. The study also evaluates company market share and profiles industry players.

#2736 ..... May 2011..... \$4800

**Cosmetic Surgery Products**

US demand for cosmetic surgery products is expected to advance 7.4 percent annually through 2014, based on a return to growth in cosmetic procedures. Injectables will remain the largest and fastest growing segment, led by BOTOX COSMETIC, DYSPORT and newer types such as calcium hydroxylapatite. This study analyzes the \$1.8 billion US cosmetic surgery product industry, with forecasts for 2014 and 2019 by procedure, product and raw material. It also evaluates company market share and profiles industry participants.

#2712 ..... December 2010 ..... \$4800

**Enzymes**

US demand for enzymes will rise 4.8 percent annually through 2014. Gains will be driven by continued expansion of higher-value specialty enzymes in pharmaceuticals, diagnostics, research and biotechnology, and biocatalysts. In the biofuels segment, growth will moderate as the industry transitions to cellulases for producing biomass ethanol. This study analyzes the \$2.2 billion US enzymes industry, with forecasts for 2014 and 2019 by market and product. It also evaluates company market share and profiles industry competitors.

#2670 ..... September 2010..... \$4900

**World Flavors & Fragrances**

Global demand for flavors and fragrances is projected to increase 4.3 percent annually through 2014. Overall advances will be stimulated by gains in food and beverage processing, the largest market. The best opportunities will be found in developing areas, particularly the Asia/Pacific region. This study analyzes the \$19 billion world flavor and fragrance industry, with forecasts for 2014 and 2019 by product, market, world region and for 19 countries. It also evaluates company market share and profiles industry players.

#2673 ..... August 2010..... \$5800

**About The Freedonia Group**

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

**Freedonia Custom Research**

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)