Cosmeceuticals

US Industry Study with Forecasts for 2015 & 2020

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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 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.
Cosmeceuticals
US Industry Study with Forecasts for 2015 & 2020

Sample Text, Table & Chart

Demand for medicated lotions (excluding acne preparations) is expected to increase 3.5 percent annually to $630 million in 2015. These lotions form a group of over-the-counter and prescription cosmeceuticals that improve intrinsic skin properties such as smoothness, moisture retention and texture, but do not provide any direct anti-aging benefits. Steady growth in the number of skin conditions will provide opportunities for medicated lotions. Currently, most product development efforts involving medicated lotions most often 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 products like ATOPICAIR (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 ITCH 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, irritated skin.

TABLE III-1
COSMECEUTICAL PRODUCT DEMAND
(million dollars)

<table>
<thead>
<tr>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Resident Population (mil persons)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$ cosmeceuticals/capita</td>
<td>10.5</td>
<td>16.6</td>
<td>20.9</td>
<td>26.3</td>
<td>31.7</td>
</tr>
<tr>
<td>Cosmeceutical Product Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By Type:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Skin Care</td>
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<td>3100</td>
<td>4060</td>
<td>5480</td>
<td>7030</td>
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<tr>
<td>Injectables</td>
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<td>490</td>
<td>686</td>
<td>980</td>
<td>1310</td>
</tr>
<tr>
<td>Hair Care</td>
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<td>300</td>
<td>460</td>
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<td>By Market:</td>
<td></td>
<td></td>
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<tr>
<td>Over-the-Counter</td>
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<tr>
<td>Professional</td>
<td>1199</td>
<td>2246</td>
<td>3115</td>
<td>4225</td>
<td>5370</td>
</tr>
</tbody>
</table>

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CHART V-2
US COSMECEUTICAL CHEMICAL MARKET SHARE BY COMPANY
($1.1 billion, 2010)

CHART SAMPLE

Click here to purchase online
Sample Profile, Table & Forecast

COMPANY PROFILES

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

Revenues: $56 million (2010, as verified by company)
Employment: 135 (verified by company, 6/11)
Key Products: prescription & nonprescription skin care cosmeceuticals

SkinMedica is a specialty pharmaceutical company 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 VANIQIA and EPIQUI brand names. VANIQIA (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. VANIQIA is reported to noticeably reduce hair growth and the need for hair removal methods in as little as eight weeks.

“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

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- Automotive & Transportation Equipment
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