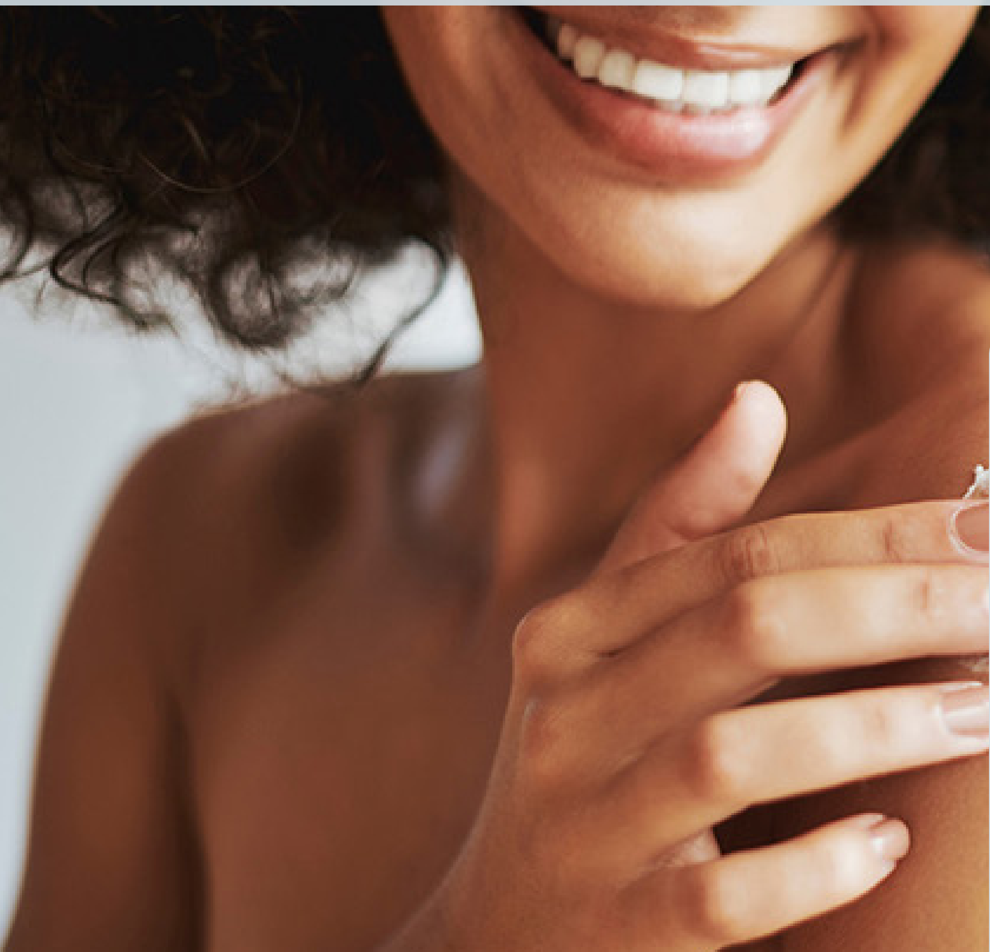
Dermatologicals

Exploring the Current & Future Self-Care Market for Skin Care and Aesthetics



Key Features of the report:

- An in-depth exploration of the Dermatologicals market, including **Antifungals**, **Wound healers**, **Acne remedies**, **Anti-itch** & more, plus coverage of adjacencies such as **Hair & beauty supplements**
- Coverage of **8 major countries** from across the globe, with topline sales, brand performances, new developments, launches and promotional campaigns, as well as **additional key markets in brief**
- Very latest mid-year 2023 sales from ***DB6***, our dedicated **CHC sales database**, plus historical growth rates to help track performance fluctuations
- **Antifungals** sales segmented into **general, VYI and nail presentations**
- **Case studies** of key Derma brands, highlighting **success factors, sales, NPD and A+P activity**, including digitally-native and online brands
- A look to the future includes long-term **forecast sales** for all categories and countries to 2027 & 2032, plus the most up-to-date short-term forecasts

Nicholas Hall's
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There are countless opportunities for marketers to capitalise on the growth potential of skincare and aesthetic products, and the pandemic has shown that hygiene and personal care have become unprecedented concerns for consumers across the world.

With overall sales held back to a degree by the stabilisation of antiseptics & disinfectants following a pandemic-related spike, much of the Derma market is actually in rude health, featuring exciting pockets of dynamism and opportunities for future growth. Strong showings among lip care, acne remedies and wound healers are just a few signs of strong demand. The picture is even brighter online, with the e-commerce skincare market taking almost $3bn in sales and enjoying year-on-year strong growth.

Categories covered in this report include:

- Antifungals
- Wound healers
- Antiseptics & disinfectants
- Anti-itch
- Acne remedies
- Feminine intimate care
- Lip care
- Haemorrhoid preparations
- Circulatory aids
- Hair loss treatments
- Eczema & psoriasis
- Scalp treatments
- Cold sore treatments
- Lice treatments
- Wart & verruca treatments
- Hair & beauty supplements†

† sales tracked under VMS in DB6

8 individual markets profiled in depth

Brazil, China, France, Germany, Italy, Japan, UK, USA

Plus selected additional markets in brief

Australia, Canada, India, Mexico, Poland, S Korea

Launch activity remains key to driving growth, with innovations in delivery format and formula frequent, while niches such as post-surgery recovery can potentially reach new audiences. A+P investment has proved an important growth driver in some areas – with marketers turning to digital channels to educate consumers and promote their products. Personalisation is also a key trend, with consumers looking for something more than a “one-size-fits-all” skincare solution.

By examining 8 core markets in detail (and additional key markets in brief), analysing brand performances and launch activity, this report investigates the untapped potential in this CHC category.

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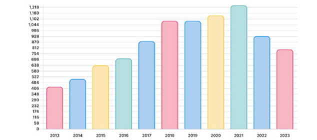
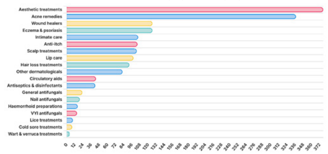
Executive Summary | Innovation round-up

- The whole CHC market has seen a slowdown in launch activity, with Derma no exception, while genuine innovation is still relatively scarce; derma launch activity slowed 2022-23, marked by a shortage of groundbreaking Rx-to-OTC switches and a particularly sharp fall in NPD activity among antiseptics & disinfectants as the world escaped Covid-19
- *Nicholas Hall's CHC New Products Tracker* shows launch activity across the CHC derma market fell from 1,239 products at its peak in 2021 to 798 in 2023, a drop of 36% over two years (following years of growing or stable launch activity)
- Yet while the volume of NPD has fallen, the proportion of good quality NPD seems to be on an upward trajectory, with derma launches ranked 3 or 4 stars† climbing to 1.8% as a proportion of new launches in 2023, from 0.7% in 2021 and 1.1% in 2022
- It is worth noting that this still leaves the vast majority of derma NPD scoring just 1 or 2 stars for innovation – hardly a ringing endorsement of the category's product development
- 9 products earned a 3-star ranking in 2023 (including just one Rx-to-OTC switch), but there were no 4-star launches
- Aesthetic treatments accounted for the vast majority of NPD activity in 2022-23 (with 377 new products), followed by Acne remedies (337), Wound healers and Eczema & psoriasis (both 126), Intimate care (105), Anti-itch (104), Scalp treatments (103), Lip care (98) and Hair loss treatments (92)

Global derma launch activity 2013-23



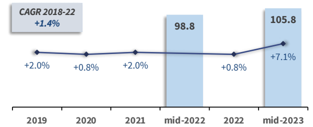
Global derma launch activity by subcategory 2022-23



† Nicholas Hall's CHC New Product Tracker grants products a star rating from 1 ("me too" products not appreciably different from those already available) to 4* (Rx-to-OTC switches, creation of new OTC class or other major leap forward in terms of innovation)*

Germany | Acne remedies

Germany acne remedies sales mid-2022 & mid-2023
(MSP, $mn)



Sales reflect MAT for 12-month period ending June 2022 & 2023
Growth rates are % change on previous 12 months

Key trends & developments

- After years of low growth, 2023 saw a marked upswing in sales, underpinned by pharmacy-exclusive brands, which garner a strong category share, and benefiting from regular NPD
- Leading brand highlights its commitment to "green beauty", with a focus on environmentally-friendly and cruelty-free formulas and recycled packaging
- Effectiveness (and dermatologist recommendation) is a common theme, along with on-the-go convenience, adult acne and overnight treatment

- L'Oréal leads via mass market **Garnier Hautklar** (31% category share) and pharmacy-exclusive **Effaclar** (via La Roche-Posay; 12% share); A+P in recent years for the former has focused on sustainability and the products' environmental impact – in line with the wider global trend – with garnier.de highlighting its digital labelling system that allows consumers to check environmental & social impact of products

  - Brand is also promoted via micro-influencers and online magazines
  - Most recent line extension was Hautklar AHA + BHA Kohle serum for acne-prone skin (charcoal, niacinamide 4%, AHA, BHA), added in late 2021
  - Effaclar was extended via Effaclar Duo+M cream, described as a "triple-correcting anti- blemish treatment for oily, acne-prone skin, powered by microbiome science"; TV & digital ads claim it delivers visible results in 8 hours, while also highlighting its environmental credentials (*see left*)

UK | Lip care

- **Vaseline** was the strongest performer in the category, with sales boosted by limited-edition launches and personalised packaging, for example Tropical Zest launched in 2023 and marketed via social media

- Current limited-edition presentation is Gold Dust, a pear-scented lip balm with gold sparkles for cosmetic effect
- **Carmex** is frequently extended with new flavours and SKUs, including a 2024 limited edition "#NotwithoutmyCarmex Gift Set" featuring a keyring with reusable cap for Carmex products; brand generates high levels of sales online

UK leading lip care brands mid-2023 *(MSP, $mn)*

	Brand	$mn	mid-23/ mid-22	CAGR 22/18
1	**Nivea** (Beiersdorf)	14.0	+18%	+3%
2	**Vaseline** (Lever Faberge / Unilever)	11.9	+31%	+6%
3	**Carmex** (Carma)	7.1	+15%	+1%
4	**Burt's Bees** (Burt's Bees / Clorox)	4.4	+17%	+10%
5	**Blistex** (Ceuta Healthcare for Blistex)	2.7	+30%	-1%
6	**O'Keeffe's** (O'Keeffe's Company)	1.6	+15%	+20%
7	**Palmer's** (E.T. Browne Drug Co)	1.2	-24%	+3%
8	**Neutrogena** (Neutrogena / Kenvue)	1.0	+23%	+8%
9	**ChapStick** (Haleon)	0.9	+25%	-9%
10	**Dr Paw Paw** (Dr Paw Paw)	0.8	+6%	+87%
	Private labels	0.9	+6%	-8%
	Others	1.4	+14%	-4%

- **Blistex** was another standout performer, reviving strongly following transfer of ownership to Ceuta and return to sale after a period of unavailability; promotion included support of gynaecological health charity The Eve Appeal, with Get Lippy campaign encouraging women to talk about health issues and challenge taboos about women's health

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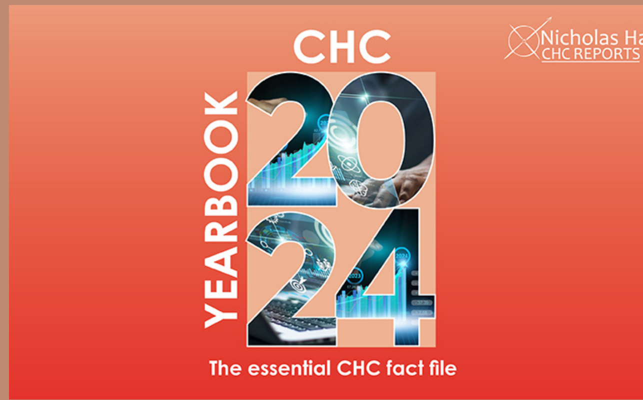

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