

Cosmeceuticals 2020

Exploring the space where Cosmetics meet Pharmaceuticals

(301 Pages)

Definitions & methodology (2 pages)

Executive Summary (30 pages)

Global Overview (2 pages)

Cosmeceuticals buoyed by consumer interest

Chart: Global cosmeceuticals sales 2015-19[†] (MSP, \$mn)

Chart: Global cosmeceuticals sales by category 2019[†] (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Defining Cosmeceuticals (6 pages)

What do we mean by Cosmeceuticals?

Regulatory uncertainty, classifications and health claims

Fortified cosmetics vs Aesthetic treatments

Category Review (9 pages)

Acne remedies

Chart: Global leading acne remedies 2019 (MSP, \$mn)

Eczema & psoriasis

Chart: Global leading eczema & psoriasis treatments 2019 (MSP, \$mn)

Hair & beauty supplements

Chart: Global leading hair & beauty supplements 2019 (MSP, \$mn)

Hair loss treatments

Chart: Global leading hair loss treatments 2019 (MSP, \$mn)

Lip care

Chart: Global leading lip care brands 2019 (MSP, \$mn)

Scar treatments

Chart: Global leading wound healers (incl. scar treatments) 2019 (MSP, \$mn)

Anti-ageing

Aesthetic treatments

Key Markets (4 pages)

Cosmeceuticals around the world

Chart: Global cosmeceuticals sales by region & key markets 2019[†] (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Key Players & Brands (1 page)

Chart: Global leading cosmeceuticals players 2019[†] (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Emerging Segments (6 pages)

Personalisation offers premium tailored skin care solutions, with innovations on the horizon

Probiotics for skin care form an expanding segment

CBD-infused cosmeceuticals

Impact of Covid-19 (1 page)

Covid-19 will have short-term impact on cosmeceuticals sales

Outlook (1 page)

Increased consumer focus on appearance will boost sales

Chart: Cosmeceuticals forecast sales 2024-29† (MSP, \$mn)

*† includes **DB6** categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers*

Brazil (24 pages)

Overview (2 pages)

Dynamic market with established beauty industry

Chart: Brazil cosmeceuticals sales 2015-19† (MSP, \$mn)

Chart: Brazil cosmeceuticals sales by category 2019† (MSP, \$mn)

*† includes **DB6** categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers*

Acne remedies (3 pages)

Broad range of cosmeceuticals available

Chart: Brazil leading acne remedies 2019 (MSP, \$mn)

Eczema & psoriasis (3 pages)

High levels of launch activity for dry skin

Chart: Brazil leading eczema & psoriasis treatments 2019 (MSP, \$mn)

Hair & beauty supplements (3 pages)

Strong performance from innovative mid-tier

Chart: Brazil leading hair & beauty supplements 2019 (MSP, \$mn)

Hair loss treatments (2 pages)

Launch activity frequent in relatively small category

Chart: Brazil leading hair loss treatments 2019 (MSP, \$mn)

Lip care (1 page)

Relatively little activity in underdeveloped category

Chart: Brazil leading lip care brands 2019 (MSP, \$mn)

Scar treatments (2 pages)

Products for consumers with tattoos a new niche

Chart: Brazil leading wound healers (incl. scar treatments) 2019 (MSP, \$mn)

Anti-ageing (3 pages)

Wide range of products and new technologies

Aesthetic treatments (3 pages)

Cellulite and sun care key segments

Outlook (2 pages)

Initiative likely to remain with established brands

Chart: Brazil cosmeceuticals forecast sales 2024-29[†] (MSP, \$mn)

Chart: Brazil cosmeceuticals forecast sales by category 2024-29[†] (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Short-term forecast: Bright spots of growth although pandemic will lead to some downturns

China (27 pages)

Overview (3 pages)

E-Commerce improves consumer choice

Chart: China cosmeceuticals sales 2015-19[†] (MSP, \$mn)

Chart: China cosmeceuticals sales by category 2019[†] (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Acne remedies (3 pages)

TCMs dominant and regarded as more efficacious

Chart: China leading acne remedies 2019 (MSP, \$mn)

Eczema & psoriasis (3 pages)

Online channel offers consumers access to international brands

Hair & beauty supplements (3 pages)

Collagen brands gaining favour, although TCMs remain dominant

Chart: China leading hair & beauty supplements 2019 (MSP, \$mn)

Hair loss treatments (3 pages)

TCM Bawang scandal provides opportunity for minoxidil brands

Chart: China leading hair loss treatments 2019 (MSP, \$mn)

Lip care (2 pages)

Natural options popular, lip care for men launched

Chart: China leading lip care brands 2019 (MSP, \$mn)

Scar treatments (3 pages)

Scar treatments a significant niche with specialist brands preferred

Chart: China leading wound healers (incl. scar treatments) 2019 (MSP, \$mn)

Anti-ageing (2 pages)

Foreign hyper-premium brands dominate, benefiting from “early anti-aging” trend

Aesthetic treatments (3 pages)

Beauty brands from Korea, Japan and China drive demand

Outlook (2 pages)

Male beauty sector will be key future market driver

Chart: China cosmeceuticals forecast sales 2024-29† (MSP, \$mn)

Chart: China cosmeceuticals forecast sales by category 2024-29† (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Short-term forecast: Covid-19 pandemic will dampen 2020 sales despite post-lockdown shopping spree

France (29 pages)

Overview (2 pages)

Broad range of products available

Chart: France cosmeceuticals sales 2015-19† (MSP, \$mn)

Chart: France cosmeceuticals sales by category 2019† (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Acne remedies (4 pages)

Personal care products building complete treatments programmes

Chart: France leading acne remedies 2019 (MSP, \$mn)

Eczema & psoriasis (3 pages)

Cosmetic-focused brands key

Chart: France leading eczema & psoriasis treatments 2019 (MSP, \$mn)

Hair & beauty supplements (4 pages)

Demand for leading products declining, but lower tier sees frequent launches

Chart: France leading hair & beauty supplements 2019 (MSP, \$mn)

Hair loss treatments (3 pages)

Diverse range of cosmeceuticals for hair loss available

Chart: France leading hair loss treatments 2019 (MSP, \$mn)

Lip care (1 page)

Little genuine innovation, with clear and established category leader

Chart: France leading lip care brands 2019 (MSP, \$mn)

Scar treatments (2 pages)

Scar treatments a significant niche for some wound care ranges

Chart: France leading wound healers (incl. scar treatments) 2019 (MSP, \$mn)

Anti-ageing (4 pages)

Vitamins A and C and antioxidants are popular ingredients

Aesthetic treatments (4 pages)

Major derma players have strong presence in aesthetic products

Outlook (2 pages)

Initiative likely to remain with established brands

Chart: France cosmeceuticals forecast sales 2024-29[†] (MSP, \$mn)

Chart: France cosmeceuticals forecast sales by category 2024-29[†] (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Short-term forecast: Covid-19 pandemic likely to hold back skin care market

Germany (23 pages)

Overview (2 pages)

Moderate growth with little innovation

Chart: Germany cosmeceuticals sales 2015-19[†] (MSP, \$mn)

Chart: Germany cosmeceuticals sales by category 2019[†] (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Acne remedies (5 pages)

Solutions, treatment and benefits drive growth

Chart: Germany leading acne remedies 2019 (MSP, \$mn)

Eczema & psoriasis (3 pages)

Derma specialists with scientific backing dominate a conservative category

Chart: Germany leading eczema & psoriasis treatments 2019 (MSP, \$mn)

Hair & beauty supplements (2 pages)

Diverse range of supplements available

Chart: Germany leading hair & beauty supplements 2019 (MSP, \$mn)

Hair loss treatments (2 pages)

Dr Wolff caffeine brands dominate, with some growth from innovative naturals

Chart: Germany leading hair loss treatments 2019 (MSP, \$mn)

Lip care (2 pages)

Little genuine innovation, with category leaders targeting younger consumers

Chart: Germany leading lip care brands 2019 (MSP, \$mn)

Scar treatments (2 pages)

Scar treatments a significant niche for some wound care ranges

Chart: Germany leading wound healers (incl. scar treatments) 2019 (MSP, \$mn)

Anti-ageing (2 pages)

Derma specialists, global cosmetic brands and local niche players compete in a crowded field

Aesthetic treatments (1 page)

Well-established cosmetics segment for treatment of rosacea-prone skin

Outlook (2 pages)

Modest long-term growth for most categories

Chart: Germany cosmeceuticals forecast sales 2024-29+ (MSP, \$mn)

Chart: Germany cosmeceuticals forecast sales by category 2024-29+ (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Short-term forecast: Covid-19 pandemic will flatten growth

Italy (15 pages)

Overview (2 pages)

Solid growth in traditional, conservative market

Chart: Italy cosmeceuticals sales 2015-19+ (MSP, \$mn)

Chart: Italy cosmeceuticals sales by category 2019+ (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Acne remedies (2 pages)

Little innovation in a category leaning more to adult acne than teens

Chart: Italy leading acne remedies 2019 (MSP, \$mn)

Eczema & psoriasis (1 page)

Conservative and underdeveloped category with limited innovation

Chart: Italy leading eczema & psoriasis treatments 2019 (MSP, \$mn)

Hair & beauty supplements (1 page)

Modest launch activity drives growth in underdeveloped category

Chart: Italy leading hair & beauty supplements 2019 (MSP, \$mn)

Hair loss treatments (2 pages)

Innovation and targeted media activity challenge a traditional and saturated minoxidil market

Chart: Italy leading hair loss treatments 2019 (MSP, \$mn)

Lip care (2 pages)

Range refreshes drive growth in lip care

Chart: Italy leading lip care brands 2019 (MSP, \$mn)

Scar treatments (1 page)

Hyaluronic acid formulations lead wound care with very few dedicated scar treatments

Chart: Italy leading wound healers (incl. scar treatments) 2019 (MSP, \$mn)

Anti-ageing (2 pages)

International anti-ageing brands are well represented in Italy, alongside local options

Outlook (2 pages)

Only modest gains forecast for Italy's cosmeceuticals

Chart: Italy cosmeceuticals forecast sales 2024-29† (MSP, \$mn)

Chart: Italy cosmeceuticals forecast sales by category 2024-29† (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Short-term forecast: Covid-19 pandemic likely to hold back skin care market

Japan (24 pages)

Overview (2 pages)

Market is sizeable but sales stagnant

Chart: Japan cosmeceuticals sales 2015-19† (MSP, \$mn)

Chart: Japan cosmeceuticals sales by category 2019† (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Acne remedies (3 pages)

Little differentiation between leading ranges

Chart: Japan leading acne remedies 2019 (MSP, \$mn)

Eczema & psoriasis (2 pages)

Demand steady for leading brands, while lower tier expanded via launches

Chart: Japan leading eczema & psoriasis treatments 2019 (MSP, \$mn)

Hair & beauty supplements (3 pages)

Collagen drinks a key segment

Chart: Japan leading hair & beauty supplements 2019 (MSP, \$mn)

Hair loss treatments (2 pages)

Launch activity frequent in minoxidil segment

Chart: Japan leading hair loss treatments 2019 (MSP, \$mn)

Lip care (2 pages)

Relatively little activity in underdeveloped category

Chart: Japan leading lip care brands 2019 (MSP, \$mn)

Scar treatments (1 page)

Small range of niche products available

Chart: Japan leading wound healers (incl. scar treatments) 2019 (MSP, \$mn)

Anti-ageing (3 pages)

Longline skin care ranges field large numbers of products for older consumers

Aesthetic treatments (3 pages)

Focus on skin lightening, with vitamin C key

Kobayashi's "Skin care Pharmaceuticals" (1 page)

Outlook (2 pages)

Online channel likely to continue to grow

Chart: Japan cosmeceuticals forecast sales 2024-29† (MSP, \$mn)

Chart: Japan cosmeceuticals forecast sales by category 2024-29† (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Short-term forecast: Return to relatively flat topline in 2021

Poland (21 pages)

Overview (2 pages)

Polish cosmeceuticals market driven by launches

Chart: Poland cosmeceuticals sales 2015-19† (MSP, \$mn)

Chart: Poland cosmeceuticals sales by category 2019† (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Acne remedies (3 pages)

Category has heavy cosmetic focus, with teenagers main target of consumer promotion

Chart: Poland leading acne remedies 2019 (MSP, \$mn)

Eczema & psoriasis (2 pages)

Sales grew well, although much dynamism is from baby products

Chart: Poland leading eczema & psoriasis treatments 2019 (MSP, \$mn)

Hair & beauty supplements (1 page)

Hair & beauty supplements compete on strength

Chart: Poland leading hair & beauty supplements 2019 (MSP, \$mn)

Hair loss treatments (2 pages)

Launches give new cosmeceutical focus

Chart: Poland leading hair loss treatments 2019 (MSP, \$mn)

Lip care (2 pages)

High launch activity boosted sales

Chart: Poland leading lip care brands 2019 (MSP, \$mn)

Scar treatments (3 pages)

Leading wound healers have more ethical focus than cosmetic

Chart: Poland leading wound healers (incl. scar treatments) 2019 (MSP, \$mn)

Anti-ageing (2 pages)

Strong competition among leading players in anti-ageing market

Aesthetic treatments (2 pages)

Cosmeceuticals market for specific aesthetic concerns well developed

Outlook (2 pages)

Solid growth forecast for cosmeceuticals

Chart: Poland cosmeceuticals forecast sales 2024-29† (MSP, \$mn)

Chart: Poland cosmeceuticals forecast sales by category 2024-29† (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Short-term forecast: Cosmeceuticals sales likely to be hit by coronavirus in 2020

South Korea (21 pages)

Overview (3 pages)

Korea remains a pioneer in skin care innovation

Chart: South Korea cosmeceuticals sales 2015-19† (MSP, \$mn)

Chart: South Korea cosmeceuticals sales by category 2019† (MSP, \$mn)

† includes DB6 categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers

Acne remedies (2 pages)

Shift to mass market options following clindamycin reverse-switch

Chart: South Korea leading acne remedies 2019 (MSP, \$mn)

Hair & beauty supplements (2 pages)

Hair loss supplements dominate, with collagen launches expanding category

Chart: South Korea leading hair & beauty supplements 2019 (MSP, \$mn)

Hair loss treatments (2 pages)

Launch activity within minoxidil-dominated category creating new segments

Chart: South Korea leading hair loss treatments 2019 (MSP, \$mn)

Lip care (1 page)

International brands locked in decline owing to competition from domestic beauty channel

Chart: South Korea leading lip care brands 2019 (MSP, \$mn)

Scar treatments (2 pages)

A+P an effective growth driver in increasingly cosmetic-focused category

Chart: South Korea leading wound healers (incl. scar treatments) 2019 (MSP, \$mn)

Anti-ageing (4 pages)

Vibrant skin care market targets young consumers

Aesthetic treatments (3 pages)

Products for skin appearance and tone popular, with frequent NPD

Outlook (2 pages)

Bright future thanks to high levels of innovation

Chart: South Korea cosmeceuticals forecast sales 2024-29[†] (MSP, \$mn)

Chart: South Korea cosmeceuticals forecast sales by category 2024-29[†] (MSP, \$mn)

*† includes **DB6** categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers*

Short-term forecast: Possible second wave of Covid-19 may slow recovery

UK (35 pages)

Overview (2 pages)

Market for cosmeceuticals developing rapidly

Chart: UK cosmeceuticals sales 2015-19[†] (MSP, \$mn)

Chart: UK cosmeceuticals sales by category 2019[†] (MSP, \$mn)

*† includes **DB6** categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers*

Acne remedies (5 pages)

Category has increasingly strong cosmetic focus

Chart: UK leading acne remedies 2019 (MSP, \$mn)

Eczema & psoriasis (5 pages)

High incidence of eczema in UK makes this a lucrative category

Chart: UK leading eczema & psoriasis treatments 2019 (MSP, \$mn)

Hair & beauty supplements (2 pages)

Well developed market, but sales starting to level out

Chart: UK leading hair & beauty supplements 2019 (MSP, \$mn)

Hair loss treatments (3 pages)

Hair loss treatments diversifying beyond traditional minoxidil options

Chart: UK leading hair loss treatments 2019 (MSP, \$mn)

Lip care (3 pages)

Wide variety of therapeutic and cosmetic options available

Chart: UK leading lip care brands 2019 (MSP, \$mn)

Scar treatments (4 pages)

Traditional scar treatment brands face growing competition from cosmetic-focused options

Chart: UK leading wound healers (incl. scar treatments) 2019 (MSP, \$mn)

Anti-ageing (5 pages)

Cosmeceutical ranges from global giants dominate the arena

Aesthetic treatments (4 pages)

Aesthetic treatments focus on even skin tone

Outlook (2 pages)

UK cosmeceuticals market has strong unlocked potential

Chart: UK cosmeceuticals forecast sales 2024-29+ (MSP, \$mn)

Chart: UK cosmeceuticals forecast sales by category 2024-29+ (MSP, \$mn)

*+ includes **DB6** categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers*

Short-term forecast: Cosmeceuticals sales forecast to be hit by coronavirus

USA (32 pages)

Overview (2 pages)

Several bright spots for US cosmeceuticals

Chart: USA cosmeceuticals sales 2015-19+ (MSP, \$mn)

Chart: USA cosmeceuticals sales by category 2019+ (MSP, \$mn)

*+ includes **DB6** categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers*

Acne remedies (7 pages)

Marketers look to stand out in crowd

Chart: USA leading acne remedies 2019 (MSP, \$mn)

Eczema & psoriasis (3 pages)

Traditional brands facing increasing competition from the cosmetic sector

Chart: USA leading eczema & psoriasis treatments 2019 (MSP, \$mn)

Hair & beauty supplements (3 pages)

“Beauty from within” concept drives sales

Chart: USA leading hair & beauty supplements 2019 (MSP, \$mn)

Hair loss treatments (2 pages)

Rogaine facing challenge to dominance

Chart: USA leading hair loss treatments 2019 (MSP, \$mn)

Lip care (3 pages)

Heavy focus on natural launches, with moisturising and hydrating claims prominent

Chart: USA leading lip care brands 2019 (MSP, \$mn)

Scar treatments (3 pages)

Room for expansion

Chart: USA leading wound healers (incl. scar treatments) 2019 (MSP, \$mn)

Anti-ageing (4 pages)

Longline derma ranges dominate

Aesthetic treatments (3 pages)

Male skin care and Korean beauty are the trends

Outlook (2 pages)

Bright future predicted for US cosmeceuticals

Chart: USA cosmeceuticals forecast sales 2024-29[†] (MSP, \$mn)

Chart: USA cosmeceuticals forecast sales by category 2024-29[†] (MSP, \$mn)

*† includes **DB6** categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers*

Short-term forecast: Cosmeceuticals sales to be hit by coronavirus in 2020

CBD Cosmeceuticals (7 pages)

Growing cannabis market offers numerous opportunities in skin care

European and Canadian regulators less favourable to CBD cosmetics than USA

Cannabis skin care a fashionable segment in USA

CBD cosmetics growing in China since opening up of segment in 2017

UK seeing a growing number of hemp and cannabis options

Overview of selected other topical CBD markets

Outlook & Prospects (6 pages)

Increased consumer focus on appearance will boost sales

Chart: Cosmeceuticals forecast sales 2024-29[†] (MSP, \$mn)

Chart: Cosmeceuticals forecast sales by category 2024-29[†] (MSP, \$mn)

Chart: Cosmeceuticals forecast sales by region 2024-29[†] (MSP, \$mn)

Short-term forecast: Cosmeceuticals sales to face disruption in 2020

Chart: Cosmeceuticals forecast sales by category 2020-21[†] (MSP, \$mn)

Chart: Cosmeceuticals forecast sales by region 2020-21[†] (MSP, \$mn)

*† includes **DB6** categories: acne remedies, eczema & psoriasis, hair & beauty supplements, hair loss treatments, lip care, wound healers*