

Dermatologicals

Trends, Innovations, Opportunities

(201 pages)

Definitions & methodology

Executive Summary (20 pages)

Global overview

Low growth category sees fair share of promising trends

Derma sales mid-2017 & mid-2018

Derma sales by region mid-2018

Leading derma markets mid-2018

Derma sales by category mid-2018

Leading derma brands 2017

Derma players

NPD vital for top derma players

Leading derma marketers 2017

Stop Press – GSK and Pfizer to combine consumer health businesses

GSK and Pfizer combined derma portfolios 2017

Crown Labs acquires four N American OTC derma brands from GSK

Acquired GSK US derma brands sales mid-2018

Category trends & innovations

Acne remedies

Anti-ageing

Antifungals

Cold sore treatments

Cosmeceuticals

Eczema & psoriasis

Feminine intimate care

Lip care

Wound care

Diabetics targeted via new derma launches

Opportunities for innovation and consumer engagement

Dermatologicals forecast sales 2022-27

Acne remedies (22 pages)

Overview (6pp)

Growth found outside established segments

Acne remedies sales mid-2017 & mid-2018

Topline acne remedies trends

Acne remedies sales by region mid-2018

Leading acne remedies markets mid-2018

Leading acne remedies 2017

Leading acne remedies marketers 2017

"Soko" acne products (2pp)

Western consumers turning to Asia for beauty products to manage acne

Patches and masks popular formats

Phototherapy devices (2pp)

Light-based devices for management of acne expanding positionings

Diagnostic scanners (1p)

Neutrogena extended with app-powered skin health tracker

C&C by Clean & Clear (2pp)

Clean & Clear subrange targets younger demographic

Clean & Clear US acne remedies sales mid-2017 & mid-2018

Key learnings from C&C by Clean & Clear launch

Differin's post-switch strategy in USA (2pp)

After slow start in USA, Differin aims to raise awareness of benefits

Differin acne remedies sales mid-2017 & mid-2018

Growth strategy

Nestlé's Proactiv dominates online channel (2pp)

Online-focused range Proactiv dominates acne category

Success factors

New opportunities (4pp)

Azelaic acid a potential switch candidate?

Oxy rolls out innovative Acne Stick

Emami expands India's male grooming market with waterless face wash

Yes to Tomatoes launches world's first bubbling face mask

Ibuprofen piconol rolled out in S Korea

Daiichi Sankyo bridges gap between antifungals and acne remedies

Isdin launches first spray for body acne in Spain

Urgo's Filmogel technology applied to acne treatment

CBD Herbal Balm brings medicated cannabis to Australia's acne market

Outlook (1p)

Numerous opportunities in high-demand category

Acne remedies forecast sales 2022-2027

Anti-ageing (23 pages)

Overview (2pp)

Reduced signs of ageing a focus for derma marketers

Key anti-ageing ingredients

Intrinsic vs extrinsic ageing

Retinol an effective anti-ageing ingredient

L'Oréal (8pp)

SkinCeuticals offers skincare "backed by science"

Anti-ageing serums include antioxidants and hyaluronic acid "booster"

SkinCeuticals' cream presentations include retinol treatments

La Roche-Posay specialises in sensitive skin

L'Oréal Paris range includes number of anti-ageing lines, with pro-retinol a focus

Success factors

Beiersdorf (3pp)

Beiersdorf active in anti-ageing via La Prairie range and presentations of Nivea

La Prairie marketed as exclusive skincare range

Nivea range includes Q10 anti-ageing line

J&J's Neutrogena & RoC (1p)

J&J fields selection of anti-ageing products in selected markets

Ageless Boost offers adenosine-based anti-ageing options in UK

Obagi Nu-Derm, 360 System and Obagi-C Rx (1p)

Professionally-oriented derma company Obagi offers clinical anti-ageing solutions

Clinique (1p)

Estée Lauder subsidiary Clinique offers diverse selection of ingredients

Body & hand skin care (2pp)

Crepe Erase targets "Dry, Crepey skin"

Anti-ageing products for hands diversify category

Supplements (3pp)

Marketers investing in supplements to combat effects of ageing

Snapshot of OTC hair loss market (1p)

Minoxidil dominates top tier, little innovation

Outlook (1p)

Demand for new products high

Antifungals (21 pages)

Overview (8pp)

Sales largely flat in developed markets

Antifungals sales mid-2017 & mid-2018

Topline antifungals trends

Antifungals sales by region mid-2018

Leading antifungals markets mid-2018

Antifungals sales by segment mid-2018

Leading antifungals 2017

Leading antifungals marketers 2017

Excilor multi-symptom launches (1p)

Excilor boosted by multi-symptom launch activity

Convenient, hygienic formats in S Korea (1p)

Launch activity focused on convenient, hygienic formats in South Korea

Butenalock launching innovative products (1p)

Butenalock driving growth in Japanese antifungals with high levels of NPD

Dusting powder in India (1p)

Competition heats up in Indian dusting powder segment

VYI products with added benefits / improved efficacy (2pp)

Monodose / dual-relief treatment offer improved convenience for consumers

Other notable VYI trends (1p)

Switch activity in VYI

Cosmetic launches (3pp)

Launches focusing on cosmetic benefits provide boost

Leading marketers in Latin America increasing investment in foot talcs and deodorants

Nail antifungals category in Japan evolving

MOB-015 (1p)

Moberg Pharma hopes MOB-015 will be nail antifungals game-changer

Switch activity & opportunities (1p)

Switch activity opens antifungals category

Outlook (1p)

Segmentation and switch offer best hope for future growth

Antifungals forecast sales 2022-2027

Cold sore treatments (14 pages)

Overview (4pp)

Cold sore treatments sales mid-2017 and mid-2018

Cold sore treatment sales by region mid-2018

Regulatory environment increasingly favourable

Topline cold sore treatments trends

Leading cold sore treatments markets mid-2018

Leading cold sore treatments 2017

Leading cold sore treatments marketers 2017

Zovirax expands range (2pp)

Cold sore No.2 extended into hydrocortisone combinations

Zovirax cold sore treatments sales mid-2017 & mid-2018

Systemic aciclovir (2pp)

Systemic aciclovir emerging segment in Poland

Hascovir Control sales mid-2017 & mid-2018

Virulite phototherapy device (1p)

Infra-red therapy Virulite launched in USA in 2015

Key developments (4pp)

Lyranda offers dietary supplement-based method of cold sore management

Oleavicin olive leaf extract-based gel offers natural relief

Herpotherm offers heat-based non-medicated treatment of cold sores

The Better Health Company extends cold sore relief supplement into Australia

Lysi-Herp Trinkampullen offers convenient cold sore fighting supplement drink

Protective patches and films convenient formats

Herpatch Cold Sore Serum combines benefits of cream and film

Outlook (1p)

Innovation will drive bright future for category

Cold sore treatments forecast sales 2022-27

Cosmeceuticals (25 pages)

Overview (4pp)

Cosmeceuticals in brief

Snapshot of cosmetics regulations in N America

Snapshot of cosmetics regulations in key Asia-Pacific markets

South Korea has clear regulatory framework

Functional Cosmetics in South Korea

Snapshot of cosmetics regulations in Europe

Advantages over cosmetics (1p)

Asian skincare products gaining overseas presence thanks to demand for cosmeceuticals

Benefits of cosmeceuticals

Rationale at forefront of cosmeceutical innovation

Rationale's new technologies (1p)

Ultraceuticals' clear selling points (1p)

Australian skincare specialist Ultraceuticals explores new niches via gender-specific ranges

Shiseido builds diverse portfolio (3pp)

Shiseido's portfolio extends across OTCs, cosmeceuticals and personal care
Shiseido leading Japanese OTC derma brands mid-2018

Fancl building skincare presence (1p)

VMS powerhouse Fancl expanded into international skincare market

Kiehl's established name in premium derma (1p)

L'Oréal subsidiary since 2000, Kiehl's offers diverse premium skincare portfolio

Vaseline Clinical Care offers "clinical strength" (1p)

Petroleum jelly brand Vaseline building stronger therapeutic identity

Obagi offers "physician-dispensed" skincare (1p)

Scientific backing and HCP distribution key for Obagi

Ceramide-based CeraVe enters UK, France (2pp)

L'Oréal's CeraVe extended into Europe in 2018

Other products (1p)

Dermaquest uses plant stem cell technology as USP
Synergie Skin increasing focus on male skincare

Kobayashi focuses on niche skincare (3pp)

Kobayashi invests in niche "Skincare Pharmaceuticals"
Kobayashi leading Japanese OTC derma brands mid-2018
Timeline: Key Kobayashi derma launches 2013-18

CH marketers turning to skincare niches (3pp)

NeoTeric's Diabetic Skincare product offers intensive treatment for dryness
Soleve Sunburn Relief UK's only sunburn treatment combining emollient and analgesic
SkinCeuticals tailors skin-lightening products to needs of Brazilian consumers
Probulin launches portfolio of dermatological probiotics in 2017
Cantabria focuses marketing for Endocare on effects of pollution on skin
Beiersdorf bridges gap between deodorants and cosmetics in Mexico
Trimb Healthcare explores cosmetic aftercare for nail antifungal
"SoKo" Korean beauty products gaining international appeal

"SoKo" beauty products (1p)

Key ingredients in Korean beauty products

Opportunities (1p)

Targeted positioning will be key to development in cosmeceuticals market

Eczema & psoriasis treatments (14 pages)

Overview (6pp)

Eczema & psoriasis sales mid-2017 and mid-2018
Eczema & psoriasis sales by region mid-2018
Good growth outside static Western Europe market
Topline eczema & psoriasis trends
Leading eczema & psoriasis markets mid-2018
Leading eczema & psoriasis brands 2017
Leading eczema & psoriasis marketers 2017

Colloidal oatmeal (2pp)

Colloidal oatmeal continues to be key natural launch area

Ceramides (1p)

Products based on ceramides a growing launch area

Options for diabetics (1p)

Presentations specifically for diabetics a growing niche

Very dry skin (2pp)

Ultra-moisturising products for very dry skin form niche growth area

Switch opportunities (1p)

Some switch opportunities for eczema & psoriasis treatments

Outlook (1p)

Niche launch areas best route to future growth
Eczema & psoriasis forecast sales 2022-27

Feminine intimate care (16 pages)

Overview (7pp)

Feminine intimate care sales mid-2017 and mid-2018
Feminine intimate care sales by region mid-2018
Brands that offer vaginal health support key to growth
Topline feminine intimate care trends
Leading feminine intimate care markets mid-2018
China's two-child policy yet to drive birth rates
Leading feminine intimate care brands 2017
Leading feminine intimate care marketers 2017
Distribution of Top 3 FIC brands globally

Increased focus on vaginal health (3pp)

NPD in China focused on vaginal health treatments since two-child policy
Increased awareness of intimate health drives demand for added health benefits

Demand for personalised natural products (2pp)

Consumers demand natural, organic products from female-focused brands

Probiotics for intimate flora (2pp)

Probiotic innovations to maintain balance of vaginal flora

Other notable trends (1p)

Growing niche for male intimate care
Medical devices for post-childbirth support
FIC products gaining trendy image

Outlook (1p)

Marketers tailoring brands to female health and lifestyle to drive solid growth
Feminine intimate care forecast sales 2022-27

Lip care (15 pages)

Overview (6pp)

Lip care sales mid-2017 and mid-2018

Lip care sales by region mid-2018

Marketers looking to NPD to stimulate growth

Topline lip care trends

Leading lip care markets mid-2018

Leading lip care brands 2017

Leading lip care marketers 2017

Sphere-shaped packs (2pp)

Competition heats up in sphere-shaped packaging

Enhanced care claims (2pp)

High number of launches making "lip conditioning" enhanced care claims

Cosmetic positioning (1p)

More marketers launching cosmetically-focused products to target younger consumers

Organic, Natural (1pp)

Organic, natural launches to appeal to environment-conscious consumers

Burt's Bees focuses on natural (1pp)

Honey-based beauty brand boosted by natural heritage

Burt's Bees lip care sales mid-2017 & mid-2018

Sun protection (1p)

More marketers launching products to protect lips from sun

Outlook (1p)

Lip care sales set for solid growth

Lip care forecast sales 2022-27

Wound care (20 pages)

Overview (6pp)

Wound care sales mid-2017 and mid-2018

Wound care sales by region mid-2018

Dynamic wound care sales driven by well-supported NPD

Topline wound care trends

Leading wound care markets mid-2018

Wound care sales by segment mid-2018

Leading wound care brands 2017

Leading wound care marketers 2017

NPD in wound healers (5pp)

Wound healers benefit from NPD focused on new technology, formats and positioning

Innovation in formulations / technology

Dressings and bandages offering new benefits

Niche positioning appeals to specific consumers

Wound healers positioned for cosmetic benefits (not just scar reduction)

Scar treatments (4pp)

Scar treatments focus on format, positioning and formulation to stand out
Stretch mark reduction niche expanding via limited launches
Study points to promising ingredients for stretch mark reduction

Nappy rash (2pp)

Nappy rash treatments extended with new formats and formulations

Other notable innovations (2pp)

Antiseptics marked by paucity of innovative developments, with handful of exceptions
Little innovation to be seen among topical antibiotics

Outlook (1p)

Positive outlook for wound care via NPD and segmentation
Wound care forecast sales 2022-27
Wound care forecasts sales by segment 2027

Outlook (4 pages)

Derma prospects & opportunities (4pp)

Numerous opportunities for innovation
Dermatologicals forecast sales 2022-27
Dermatologicals forecast sales by category 2027