# OTC products for acne treatment

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## Objective

A global understanding of markets, products, and distribution channels related to the acne product market. Our overall focus is on the **OTC market**, not prescription.

## Introduction

**Definition**

Acne vulgaris (commonly called acne) is a common skin condition, affecting 85-100% of people at some time during their lives. It is caused by changes in the pilosebaceous units, skin structures consisting of a hair follicle and its associated sebaceous gland. It is characterized by noninflammatory follicular papules or comedones and by inflammatory papules, pustules, and nodules in its more severe forms. Acne vulgaris affects the areas of skin with the densest population of sebaceous follicles; these areas include the face, the upper part of the chest, and the back. Severe acne is inflammatory, but acne can also manifest in noninflammatory forms. Acne lesions are commonly referred to as pimples, blemishes, spots, zits, or acne. Source



Source
There's been a gap in products marketed to adult women--little or nothing was available to address their acne needs, and as a result, sales have lagged. "No one was looking to target the 30- to 40-year-olds," said Lee Feldman, vice president of sales for Advanced Research Labs. Source

- In this report we have presented Acne Market details for following countries.

### Causes of Acne

Acne is a common occurrence at puberty. With the increased production of sex hormones, the sebaceous glands become hyperactive. Androgen and progesterone are responsible for the hyperplasia of the oil glands. The usual premenstrual flare-up is explained by some observers as occurring during the period when the normal androgen-estrogen balance in the blood is altered in favor of androgen. Hence hormonal imbalance is held responsible for causing acne. Psychogenic stresses particularly the habit of picking pimples, makes them worse.

Besides seborrhoeic diathesis and hormonal imbalance, other factors which aggravate acne are:

- a diet rich in fats and starches;
- intestinal stasis, especially constipation;
- a sedentary life;
- excessive use of greasy cosmetics, pomade, detergents and mechanical rubbing
- Heavy or oily make up
- Over abrasive cleansing
- Diet high in nutritious food can also help aggravate acne.

Source

### Acne Types

There are various types of acne and they are:-

- Acne Rosacea
- Acne Cosmetica
- Acne Vulgaris

- Acne Fulminans
- Acne Keloidalis Nuchae
- Acne Chloracne
- Acne Medicamentosa

Source

### Acne Treatment

**Medical Treatment**

Medical treatment is suggested only in cases of chronic or severe acne and should be taken from the dermatologist.

To outline the drug treatment, it aims chiefly to:

- Cut down the bacteria in the hair follicles and on the skin surface.
- Open the hair follicles by removal of the blackheads.
- Cut down the acne inflammations.

**Local Drug Treatments**

Benzoyl Peroxide preparations available as gels and lotions have become very popular in the treatment of acne. Cream "Ultra Clearasil" is a very potent Benzoyl preparation. One of the main action points of Benzoyl Peroxide is to kill bacteria. It releases oxygen which helps in killing aerobic bacteria.

The sulphur drug preparations, available as creams, gels and lotions, are extremely effective in treating acne. Like Benzoyl Peroxide, sulphur is committed to killing bacteria. Sulphur is a disinfectant and used in skin treatments for eczema, etc.

Tetracycline usually has no side-effects and hence is the safest drug. However, in some uncommon cases, it causes bilousness, indigestion, vaginal thrush or rash.

Source

## Research Methodology

**Objective** A global understanding of markets, products, and distribution channels related to the acne product market. Our overall focus is on the OTC market(Excluding prescription drugs).

**Data Collection**

Secondary data sources are only used to conduct the research.

The list of various sources used to conduct the research are as follows:

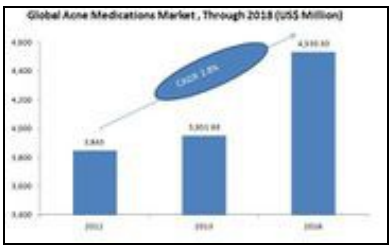
1. Euromonmitor International
2. BCC Research
3. IBISWorld Industry Research
4. MarketResearch.com
5. Frost and Sullivan
6. Marketline Business Information Center (Datamonitor)
7. Online Pharmacy Store: drugstore.com
8. Search Engine: Google

**Scope of the study**

1. Included two major markets namely U S and Japan.
2. Study covers leading brands for Acne treatment for OTC and not Prescription drugs for mass distribution channel that includes mainstream supermarkets, chain drugstores and mass merchandisers.

# Global Acne Medications Market

As per BCC Research the value of the Global Acne Medications Market for year 2012 was estimated to be $3.5 billion and it is expected to reach $4.5 billion by year 2018 at a CAGR of 2.8%.




Source:BCC Research,[1]

**The Acne Product Pipeline**

| Product | Company | Indication | Development Status |
|---|---|---|---|
| ACAT Inhibitor | Graceway Pharmaceuticals | Acne | Phase II |
| ANT-1207 (botulinum toxin A) | Anterios | Acne vulgaris | Phase II |

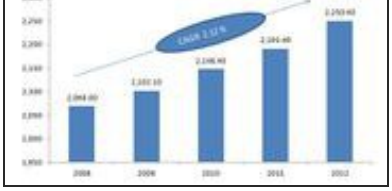
| | | | |
|---|---|---|---|
| ASC-J9 | AndroScience | Acne vulgaris | Phase II |
| AUS-131/doxycycline | Nexgen Dermatologics | Acne vulgaris | Phase I/II |
| BLI-1100 | Braintree Laboratories | Acne vulgaris | Phase II |
| CD-07223 | Galderma R &D | Acne | Phase II |
| CD-2475-101 | Galderma Laboratories | Acne vulgaris | Phase I |
| Clindamycin/tretinoin topical combination | Skinvisible Pharmaceuticals | Acne | In clinical trials |
| COL-177 | Onset Dermatologics | Acne vulgaris | In clinical trials |
| Duac Topical Gel low-dose clindamycin/benzoyl peroxide gel | Stiefel, a GSK company | Acne vulgaris | Application submitted |
| E-0301 | Elorac | Acne | Phase III |
| IDP 107 | Valeant Pharmaceuticals | Acne vulgaris | Phase II |
| Isotretinoin | Cipher Pharmaceuticals | Acne | Phase III |
| JNJ-10229570 | Johnson & Johnson | Acne vulgaris | Phase II |
| Metvixia | PhotoCure methyl aminolevulinate | Acne | Phase II |
| NB-003 (nanoemulsion) | NanoBio | Acne | Phase I |
| NVC-422 | Galderma | Acne | Phase I completed |
| Tazarotene foam (retinoid foam) | Stiefel, a GSK company | Acne vulgaris | Phase III |
| Tretinoin topical | Phosphagenics | Acne | Phase I |
| WC-3018 | Warner Chilcott | Acne | Phase II |
| WC-3035 | Warner Chilcott | Acne | Phase I |

Source: Pharmaceutical Research and Manufacturers of America, 2011

## USA market study

### Historic Sales

- The Acne Treatment Manufacturing OTC industry has maintained strong growth during the past five years. As per IBIS World estimates from 2007 to 2 steady, and it is expected to grow at an average annual rate of 2.4% to $2.3 billion.
- Because acne-prone individuals consider treatment products a necessary expense, revenue continued to rise during the recession, though growth did to more inexpensive products.
- Increasing prevalence of adult-onset and persistent acne conditions has given rise to new, targeted products and an expanded consumer base, anothe revenue growth during the period.
- In 2012, industry revenue is expected to maintain its growth, gaining 2.7% during the year, due to modest improvements in per capita disposable incon




Source:IBIS World,[2]

### Industry Forecast

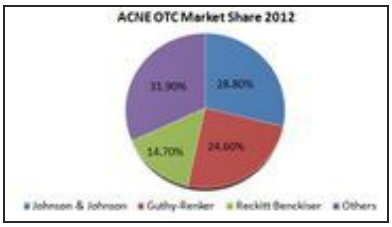
- From 2012 to 2017, industry revenue is expected to go up an annualized rate of 3.1% to $2.7 billion from current level of $2.3 billion.
- Improving economic conditions is likely to drive the market, as greater disposable income growth allows consumers to spend on higher-priced over-the




Source:IBIS World,[3]

## Major Players in Acne Space

- As per IBIS World estimates the top three industry players (Johnson & Johnson, Guthy-Renker and Reckitt-Benckiser) hold a combined market share o rest of the market is characterized by a large number of small and medium-size businesses.
- J&J (Neutrogena, Clean & Clear, Aveeno, Ambi) commanded over 28.8% of anti-acne preparation sales in 2012. J&J?s closest rival was Guthy Renke had a 24.6% share followed by Reckitt Benckiser at 14.7%.




Source:IBIS World,[4]

## Consumer Target Group & Product Categorization

**Consumer Target Group**

Here we have divided entire population into various categories. This categories are defined as follows:

1. Teenager/Young Adult : Age 13 to 20 years
2. Adult : Age 25 and Above
3. General population

**Product Categorization**

Here, we had tried to categorize the the different products under following 3 categories.

1. Devices
2. Kits
3. Moisturizers/Lotion/cream

The below information is regarding the target group and categories are obtained from company websites and review published on various online pharmacy sites.

| Company | Brand | Category | Target | Company | Brand | Cate |
|---|---|---|---|---|---|---|
| Johnson & Johnson | Ambi | Moistureriser/Lotion/Cream | General Population | Mentholatum Co. | OXY Body Wash 2% Salicylic Acid Acne Treatment, Island Wave | Moistureriser/L |
| Johnson & Johnson | Aveeno Clear Complexion | Moistureriser/Lotion/Cream | General Population | Mentholatum Co. | OXY Face Wash Acne-Fighting Formula | Moistureriser/L |
| Johnson & Johnson | Clean & Clear Advantage Acne Cleanser | Kits and Moistureriser/Lotion/Cream | Adult | Mentholatum Co. | Oxy chill factor Face Scrub Acne treatment | Moistureriser/L |
| Johnson & Johnson | Neutrogena Acne Stress Control | Moistureriser/Lotion/Cream | Teen and Adult | Mentholatum Co. | Phisoderm Anti-Blemish Body Wash | Moistureriser/L |
| Johnson & Johnson | Neutrogena Advanced Solutions | Moistureriser/Lotion/Cream | Teen and Adult | Mentholatum Co. | Phisoderm Anti-Blemish Cleansing Pads | Moistureriser/L |
| Johnson & Johnson | Neutrogena Clear Pore | Moistureriser/Lotion/Cream | Teen and Adult | Kao Co., Ltd. | Biore Blemish Fighting Ice Cleanser | Kits and Moistureriser/L |
| Johnson & Johnson | Neutrogena Healthy Skin | Moistureriser/Lotion/Cream | Teen and Adult | Kao Co., Ltd. | Biore Warming Anti-Blackhead Cream Cleanser | Moistureriser/L |
| Johnson & Johnson | Neutrogena Oil Free Acne Wash | Moistureriser/Lotion/Cream | Teen and Adult | Alberto-Culver Co. | St Ives Apricot Face Wash | Moistureriser/L |
| Johnson & Johnson | Neutrogena On the Spot | Moistureriser/Lotion/Cream | Teen and Adult | Blistex, Inc. | Stridex | Moistureriser/L |
| Johnson & Johnson | Neutrogena Men Skin Clearing Face Wash | Moistureriser/Lotion/Cream | Teen and Adult | The Procter & Gamble Co. | Noxzema | Kits and Moistureriser/L |
| Johnson & Johnson | Neutrogena Rapid Clear | Moistureriser/Lotion/Cream | Teen and Adult | The Procter & Gamble Co. | Olay Daily Facials Clarity | Moistureriser/L |
| Reckitt Benckiser PLC | Clearasil Daily Acne Control Vanishing Acne Treatment Cream | Moistureriser/Lotion/Cream | Teen and Adult | Stiefel Laboratories, Inc. | Stiefel Panoxyl | Kits and Moistureriser/L |
| | | Moistureriser/Lotion/Cream | | | Sea Breeze | Moistureriser/L |

| | | | | | | |
|---|---|---|---|---|---|---|
| Reckitt Benckiser PLC | Clearasil Acne Control Adult Acne Treatment Cream | | Teen and Adult | Bristol-Myers Squibb | | |
| University Medical | University Medical | Kits and Moistureriser/Lotion/Cream | Teen and Adult | Bristol-Myers Squibb | Sea Breeze Naturals Gentle Cream Cleanser | Kits and Moistureriser/L |
| University Medical | University Medical AcneFree Clear Skin System | Kits and Moistureriser/Lotion/Cream | Adult | Nature?s Cure, Inc. | Nature?s Cure | Moistureriser/L |

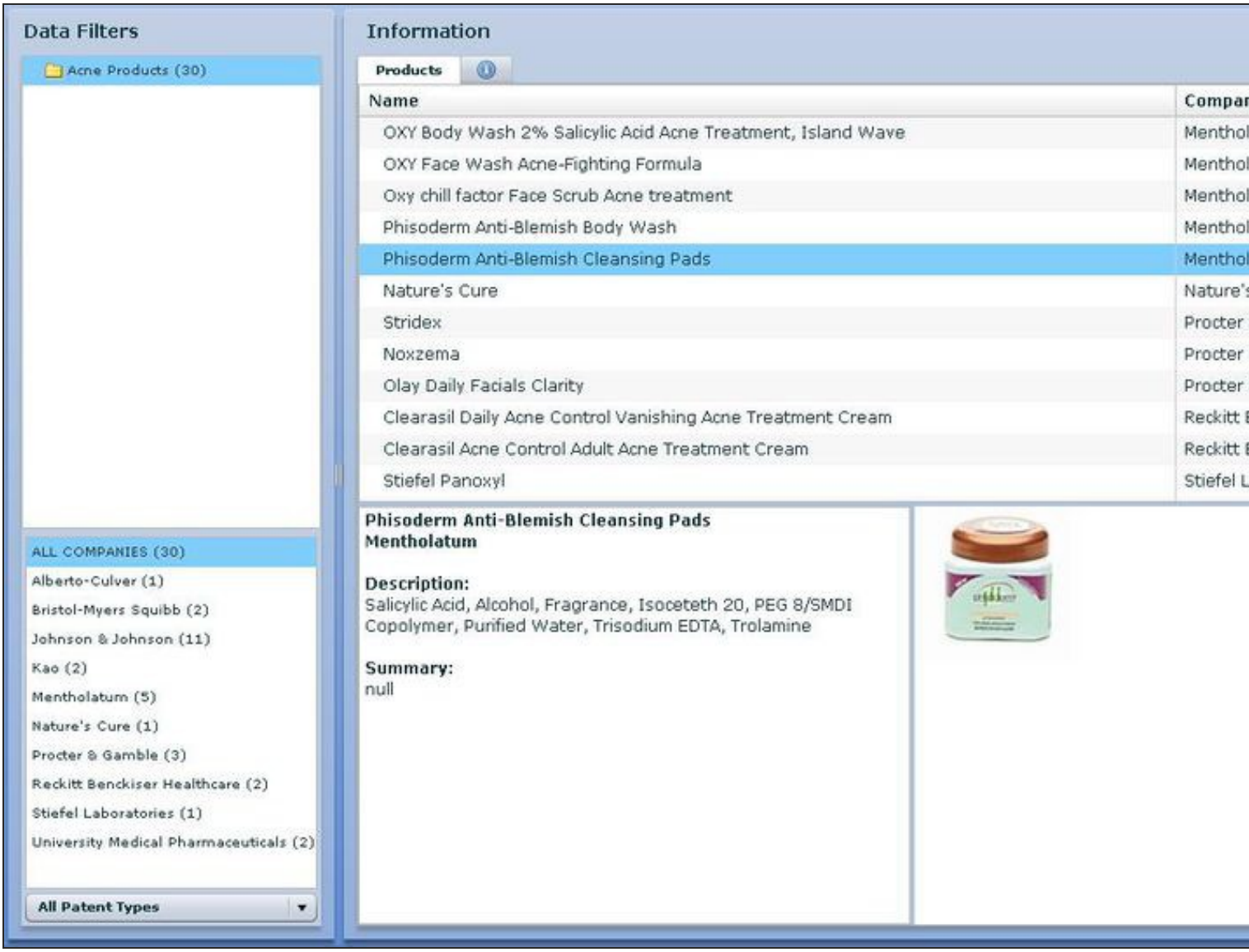
### OTC Products

This report covers the product available in mass distribution channel only.

### Product Dashboard

Link to the Product Dashboard

Snapshot of the dashboard



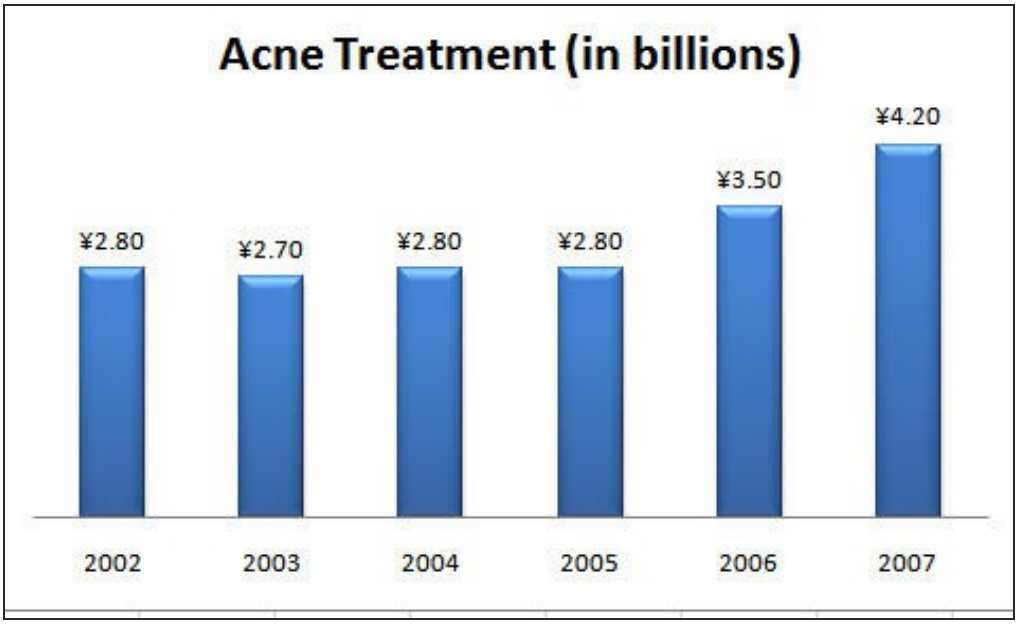

## Japan Market Study

### Market Facts

- Acne treatments most dynamic with 20% current value growth in 2007
- Acne treatments were the best performing product area in 2007, achieving 20% current value growth over the previous year. This was chiefly due to th Mentholatum Acnes from Rohto Pharmaceutical Co Ltd in 2006. The brand was re -launched with a more effective formulation and grew share dynami
- Acne treatments are also expected to see strong growth during the forecast period, with constant value growth of 42%. Growth will be supported by fur development. The growing number of busy and affluent young workers suffering from acne will make this product area highly attractive to players durin these consumers generally willing to pay more for products that are convenient and enhance their appearance. New launches are therefore expected t formulations that also claim to improve skin condition.

## Historic Sales

Following figure shows the sales of acne treatment product during the period 2004 to 2007.




Source : Euromonitor International

## Brands and their Sales

- The below table shows the names of various brands under acne care and their respective **sales percentage** for the period between 2004 to 2007.

| Acne Treatments Brand Shares by Value 2004-2007 | | | | |
|---|---|---|---|---|
| Brand | 2004 | 2005 | 2006 | 2007 |
| Mentholatum Acnes(Oxy) | 13.4 | 13.4 | 14.3 | 19.1 |
| Clearasil Acne | 19.5 | 22 | 17.5 | 15.5 |
| Pair Acne | 5.4 | 5.4 | 17.2 | 14.6 |
| Bif Night | 13.5 | 14.4 | 14.3 | 12.4 |
| Pimplit | 9.4 | 9.4 | 8.6 | 7.6 |
| Menturm Acne Lotion | 8.7 | 8.6 | 6.6 | 5.7 |
| Skinlife | 4 | 4 | 2.9 | 2.4 |
| Pair Acne Cream W | | | 2.9 | 2.4 |
| Eva Youth | | | | 2.4 |
| Acnepell | 3.3 | 3.3 | 2.3 | 2.1 |
| Freshing Cream | 2.9 | 2.9 | 2 | 1.9 |
| Eskamel | 2.5 | 2.5 | 1.7 | 1.7 |
| Annsalbe | 1.8 | 1.8 | 1.1 | 1 |
| Eva Youth | 3.3 | 3.3 | 2.6 | |
| Private label | 2.2 | 2.1 | 1.4 | 1.2 |
| Others | 10.1 | 6.8 | 4.6 | 10 |

[Source : Euromonitor International]

## Categorization of Products

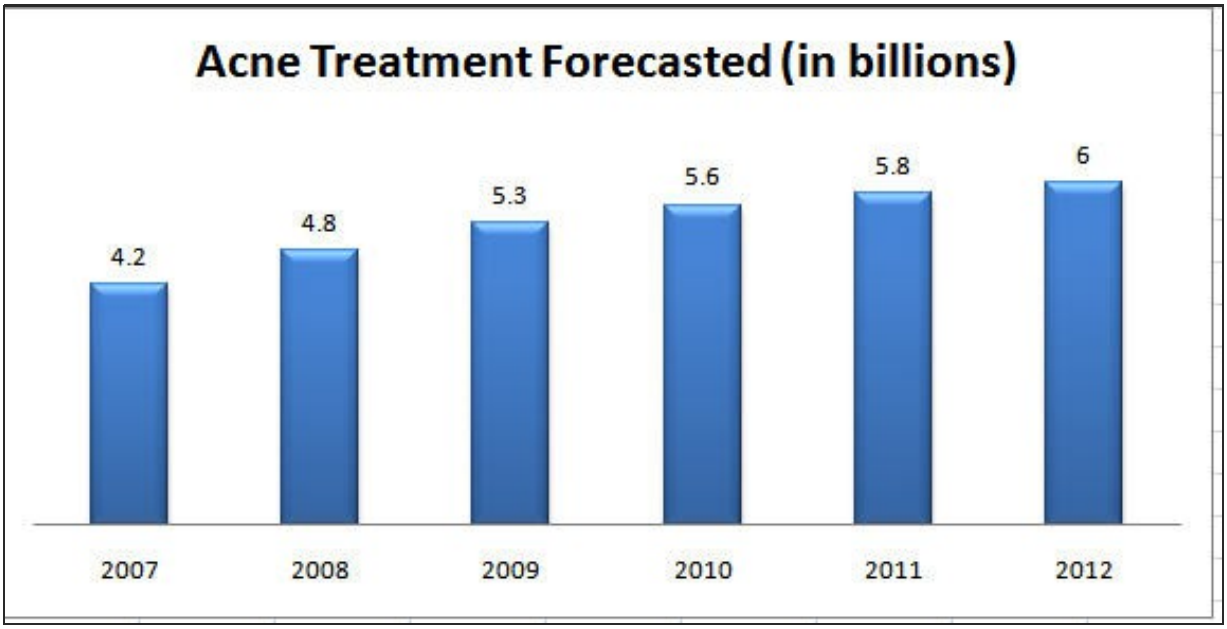
- Here, we had tried to categorize the the different products under following 3 categories.

1. Devices
2. Kits
3. Moisturizers/Lotion/cream

| Brand | Category |
|---|---|
| Mentholatum Acnes(Oxy) | Moistureriser/Lotion/Cream |
| Clearasil Acne | Kits and Moistureriser/Lotion/Cream |
| Pair Acne | Moistureriser/Lotion/Cream |
| Bif Night | Moistureriser/Lotion/Cream |
| Pimplit | Moistureriser/Lotion/Cream |
| Menturm Acne Lotion | Moistureriser/Lotion/Cream |
| Skinlife | Moistureriser/Lotion/Cream |
| Pair Acne Cream W | Moistureriser/Lotion/Cream |
| Acnepell | Moistureriser/Lotion/Cream |
| Eskamel | Moistureriser/Lotion/Cream |
| Annsalbe | Moistureriser/Lotion/Cream |

### Sales Forecast

- The following image shows the forecasted sales figure of the acne treatment market for Japan.




Source : Euromonitor International

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**Samir Raiyani**
**Email**: info@dolcera.com
**Phone**: +1-650-269-7952