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:

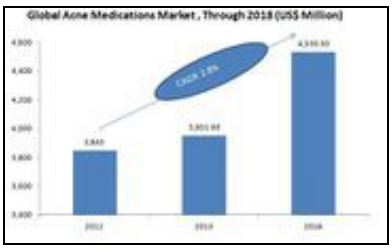
1. Euromonmitor International
2. BCC Research
3. IBISWorld Industry Research
4. MarketResearch.com
5. Frost and Sullivan
6. Marketline Business Information Center (Datamonitor)
7. Online Pharmacy Store: drugstore.com
8. Search Engine: Google

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

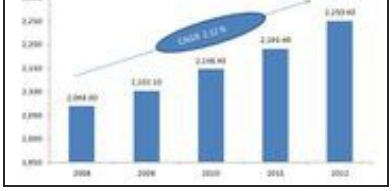
ASC-J9	AndroScience	Acne vulgaris	Phase II
AUS-131/doxycycline	Nexgen Dermatologics	Acne vulgaris	Phase I/II
BLI-1100	Braintree Laboratories	Acne vulgaris	Phase II
CD-07223	Galderma R &D	Acne	Phase II
CD-2475-101	Galderma Laboratories	Acne vulgaris	Phase I
Clindamycin/tretinoin topical combination	Skinvisible 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

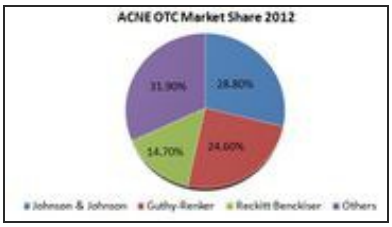
- From 2012 to 2017, industry revenue is expected to go up an annualized rate of 3.1% to $2.7 billion from current level of $2.3 billion.
- Improving economic conditions is likely to drive the market, as greater disposable income growth allows consumers to spend on higher-priced over-the



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

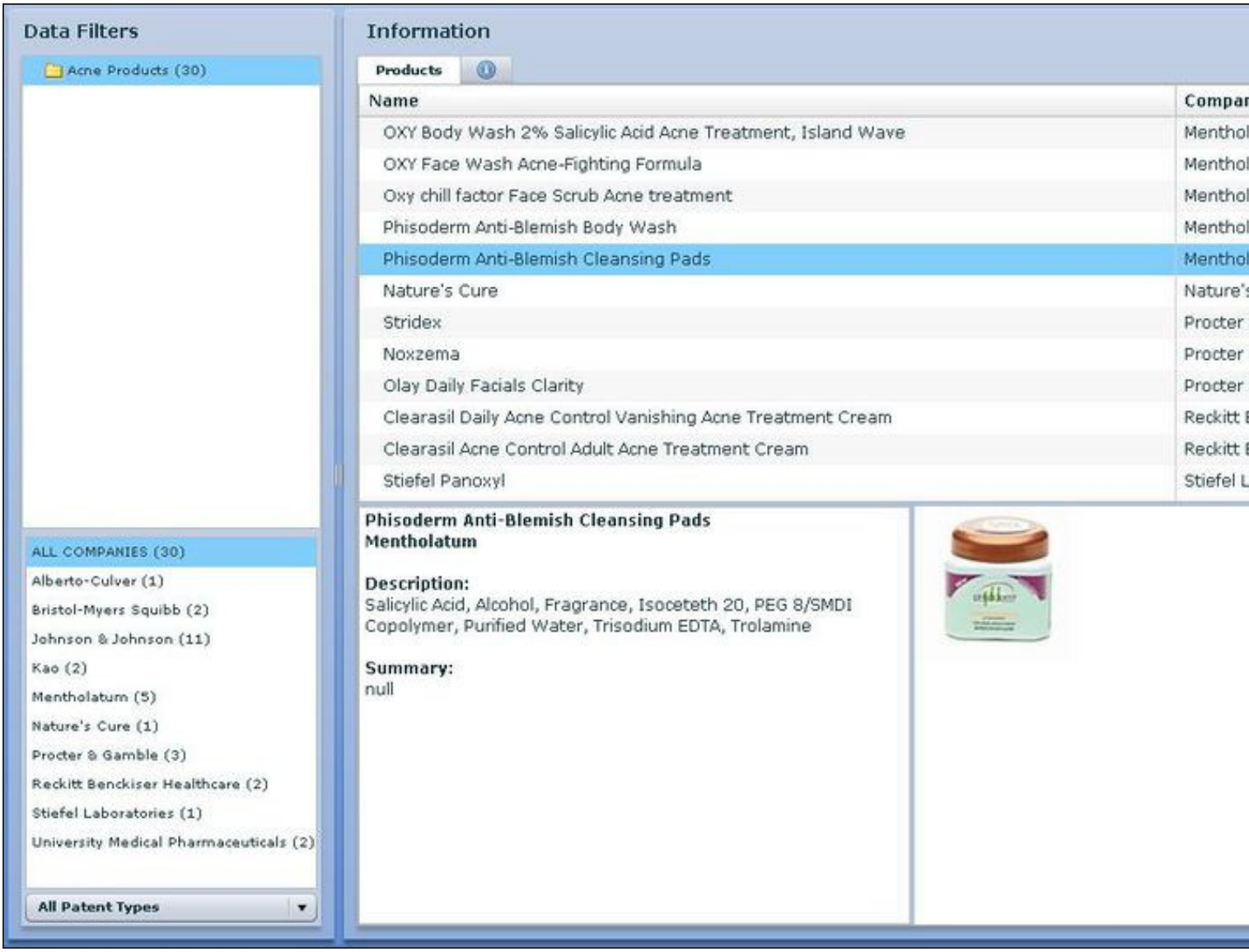
OTC Products

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

Product Dashboard

Link to the Product Dashboard

Snapshot of the dashboard



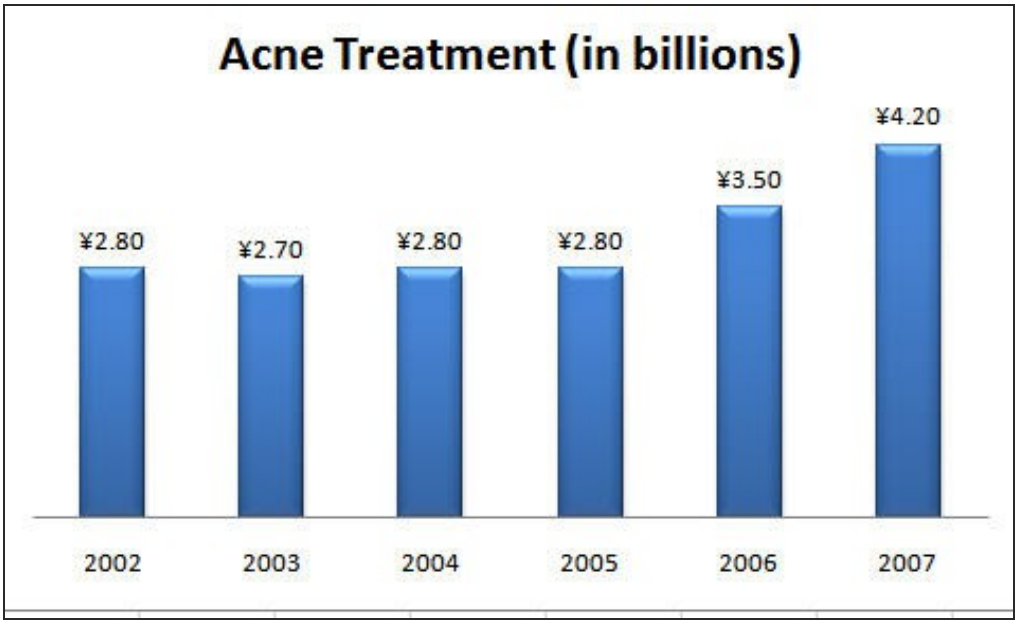
Japan Market Study

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

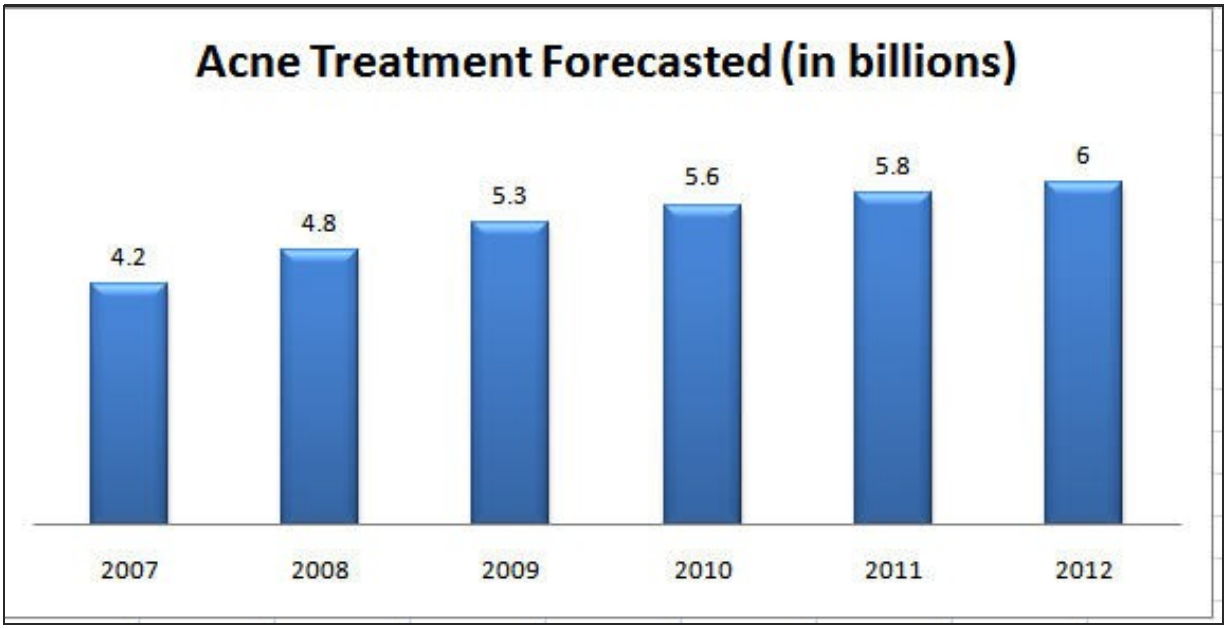
- Here, we had tried to categorize the the different products under following 3 categories.

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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