

MARKET FOR EPIDERMAL GROWTH FACTOR COSMETICS

Prepared by:

CPL Business Consultants

Innovation Centre, Milton Park, Abingdon, Oxfordshire, OX14 4RY

Tel: +44 1865 257 257, info@cplconsult.com, www.cplconsult.com

Dr Esther Hunter
Dr Steve Lisansky

STRATEGIES TO GROW YOUR BUSINESS

TABLE OF CONTENTS

OBJECTIVE.....	1
METHOD	1
PRINCIPAL FINDINGS	2
REGULATION	2
SAFETY	3
EFFICACY	5
MARKET FOR COSMETICS & PERSONAL CARE	5
CONCLUSIONS	10
REGULATION	10
SAFETY	10
EFFICACY AND ITS COMPETITIVE IMPORTANCE.....	11
MARKET FOR COSMETICS & PERSONAL CARE	11
RECOMMENDATIONS	13
REGULATION	14
EU REGULATION	14
<i>Banned and restricted substances.....</i>	14
<i>Approved substances</i>	14
<i>Safety assessment.....</i>	14
<i>Information to consumers</i>	15
<i>In-market surveillance</i>	15
<i>Safety objectives</i>	16
<i>Safety assessment.....</i>	16
<i>In-market control.....</i>	16
<i>Carcinogenic, mutagenic and reprotoxic (CMR) substances</i>	16
<i>Facilitating the management of cosmetics legislation</i>	17
REGULATION (EC) NO 1223/2009 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL	17
<i>Chapter II Safety, Responsibility, Free Movement</i>	17
<i>ANNEX I Cosmetic Product Safety Report</i>	17
INCI ENTRY FOR EGF	20
USA FDA	22
<i>Federal Food, Drug, and Cosmetic Act (FD&C Act).....</i>	22
<i>Voluntary Cosmetic Registration Program (VCRP).....</i>	23
DEFINITIONS FOR EGF	26
<i>Function.....</i>	26
<i>EGF-family.....</i>	26
<i>EGF as Therapeutic Protein.....</i>	26
SCIENTIFIC RESEARCH ON SAFETY (AND EFFICACY) OF EGF	27
OVERVIEW	27
<i>Safety</i>	27
<i>Efficacy</i>	29
PUBLICATIONS	30
<i>39 publications</i>	30
FORUM DISCUSSIONS & MAGAZINE ARTICLES	142
<i>3 discussions.....</i>	142
PATENTS	164
OVERVIEW OF COSMETIC/PERSONAL CARE MARKET	166
GLOBAL MARKET	166
PER CAPITA SPENDING.....	169

BUYING PATTERNS AND SHIFTING TRENDS.....	169
DIVISION BY SECTOR	170
GROWTH FORECASTS	180
NATURE OF COMPETITION & PLAYERS	181
BARRIERS TO ENTRY	182
COMPETITION FROM MEDICAL DEVICES AND PHARMACEUTICALS INDUSTRIES.....	183
SMALL AND MEDIUM-SIZED ENTERPRISES	184
DIRECT SELLING APPROACH	184
KEY POLICY ISSUES — RESEARCH & DEVELOPMENT	184
INTELLECTUAL PROPERTY / PATENTS	186
ADDITIONAL INFORMATION	188
<i>Structure of Industry and Production</i>	<i>188</i>
<i>Counterfeit Goods.....</i>	<i>189</i>
<i>External Trade.....</i>	<i>189</i>
<i>Revealed Comparative Advantage.....</i>	<i>190</i>
INGREDIENT SUPPLIER PERSPECTIVE OF THE MARKET	196
INTRODUCTION.....	196
MARKET.....	197
STRUCTURE OF THE INDUSTRY	197
TRENDS	199
KEY SUCCESS FACTORS	200
MAJOR INGREDIENT PRODUCERS	201
PERSONAL CARE PRODUCTS	204
<i>Personal Care Chemical Products and Functions</i>	<i>204</i>
<i>Emollients and Moisturizers</i>	<i>205</i>
<i>Markets</i>	<i>207</i>
THICKENING AGENTS	209
<i>Markets</i>	<i>212</i>
<i>Carriers</i>	<i>213</i>
EXAMPLES OF HIGH-END SKINCARE PRODUCTS ON THE MARKET.....	219
NEWS.....	250
<i>14 articles</i>	<i>250</i>
CONTACTS	265
4 CONTACTS	265
APPENDICES – SCIENTIFIC PAPERS.....	270

TABLES

TABLE 1	MARKET FORECAST	167
TABLE 2	COSMECEUTICAL PRODUCT & CHEMICAL DEMAND (\$M)	168
TABLE 3	PER CAPITA CONSUMPTION BY COUNTRY AND REGION.....	169
TABLE 4	COSMECEUTICAL COMPETITIVE SITUATION (IRI DATA, % SHARE).....	174
TABLE 5	ESTIMATED US SALES OF COSMECEUTICAL SKIN CARE PRODUCTS (\$MM).....	175
TABLE 6	MARKET SIZE FORECAST- OVERVIEW.....	180
TABLE 7	MARKET SHARE FOR TOP 10 GLOBAL COSMETICS COMPANIES	182
TABLE 8	R&D SPENDING	185
TABLE 9	R&D EXPENDITURE BY COUNTRY	186
TABLE 10	TOTAL COSMETICS PATENTS - EUROPEAN PATENT OFFICE.....	187
TABLE 11	C&T INDUSTRY EXPORTS	190
TABLE 12	PERSONAL CARE – KEY SUCCESS FACTORS.....	201
TABLE 13	PERSONAL CARE – MAJOR PLAYERS	202
TABLE 14	PERSONAL CARE – 5 FORCES.....	203
TABLE 15	PERSONAL CARE PRODUCT GROUPS	204
TABLE 16	PERSONAL CARE – EMOLLIENT MARKET BY GEOGRAPHY	208

FIGURES

FIGURE 1	EUROPE, US, CHINA, JAPAN C&T MARKET SIZES, RETAIL SALES PRICE.....	167
FIGURE 2	GROWTH OF EU COSMETICS AND TOILETRIES PRODUCT CATEGORIES	170
FIGURE 3	REVENUE (\$VOL.(B) AND %CAGR)	171
FIGURE 4	GLOBAL COSMECEUTICAL DEMAND	172
FIGURE 5	ESTIMATED GLOBAL SALES OF COSMECEUTICAL SKIN CARE PRODUCTS	173
FIGURE 6	ALL COSMETICS - MARKET SEGMENTS BY AGE	176
FIGURE 7	SUN CARE MARKETS – GEOGRAPHICAL	176
FIGURE 8	SUN CARE MARKETS – SUBSEGMENTS	177
FIGURE 9	US SUN CARE MARKET SHARE	178
FIGURE 10	EU SUN CARE MARKET SHARE	179
FIGURE 11	GLOBAL COSMETIC MARKET SHARE.....	181
FIGURE 12	COSMETICS INDUSTRY RCA ANALYSIS	191
FIGURE 13	EU COSMETICS INDUSTRY RCA ANALYSIS	192
FIGURE 14	CHINA COSMETICS RCA ANALYSIS	192
FIGURE 15	JAPAN COSMETICS INDUSTRY RCA ANALYSIS	193
FIGURE 16	UNITED STATES RCA ANALYSIS.....	194
FIGURE 17	PERSONAL CARE – MARKET VOLUME AND VALUE BY REGION	197
FIGURE 18	PERSONAL CARE – KEY VALUE CHAIN	198
FIGURE 19	PERSONAL CARE – PRODUCT RANKING	205
FIGURE 20	PERSONAL CARE – EMOLLIENT VALUE CHAIN.....	206
FIGURE 21	PERSONAL CARE – EMOLLIENT MARKET BY COMPOUND.....	209
FIGURE 22	PERSONAL CARE – THICKENING AGENT VALUE CHAIN.....	210
FIGURE 23	PERSONAL CARE – THICKENING AGENT MARKET BY GEOGRAPHY	213