

Japan

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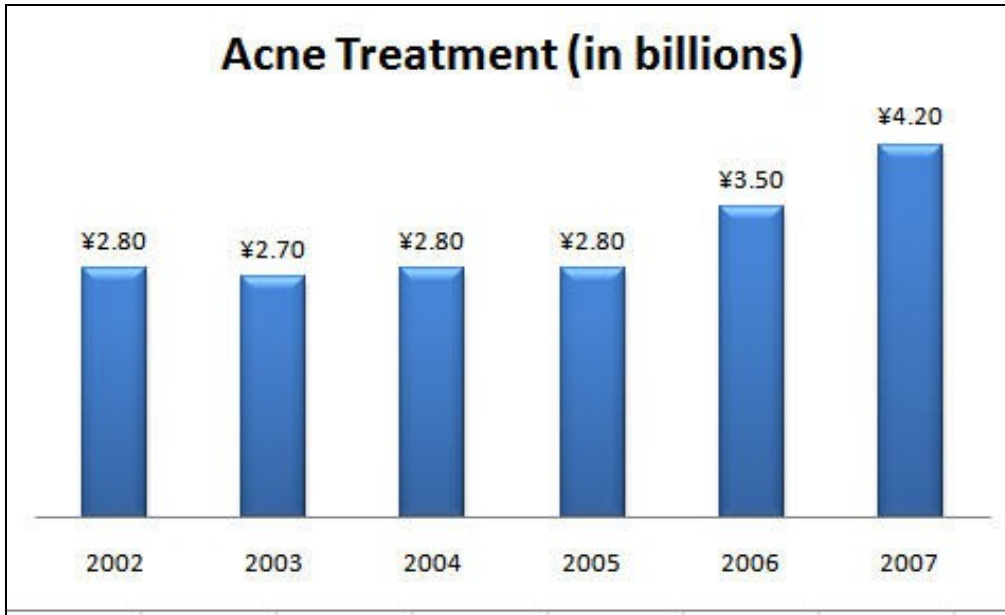
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Market Facts

- 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 the re- launch of leading brand Mentholatum Acnes from Rohto Pharmaceutical Co Ltd in 2006. The brand was re -launched with a more effective formulation and grew share dynamically in 2007 as a result.
- Acne treatments are also expected to see strong growth during the forecast period, with constant value growth of 42%. Growth will be supported by further new product development. The growing number of busy and affluent young workers suffering from acne will make this product area highly attractive to players during the forecast period, with these consumers generally willing to pay more for products that are convenient and enhance their appearance. New launches are therefore expected to focus on swiftly absorbed 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

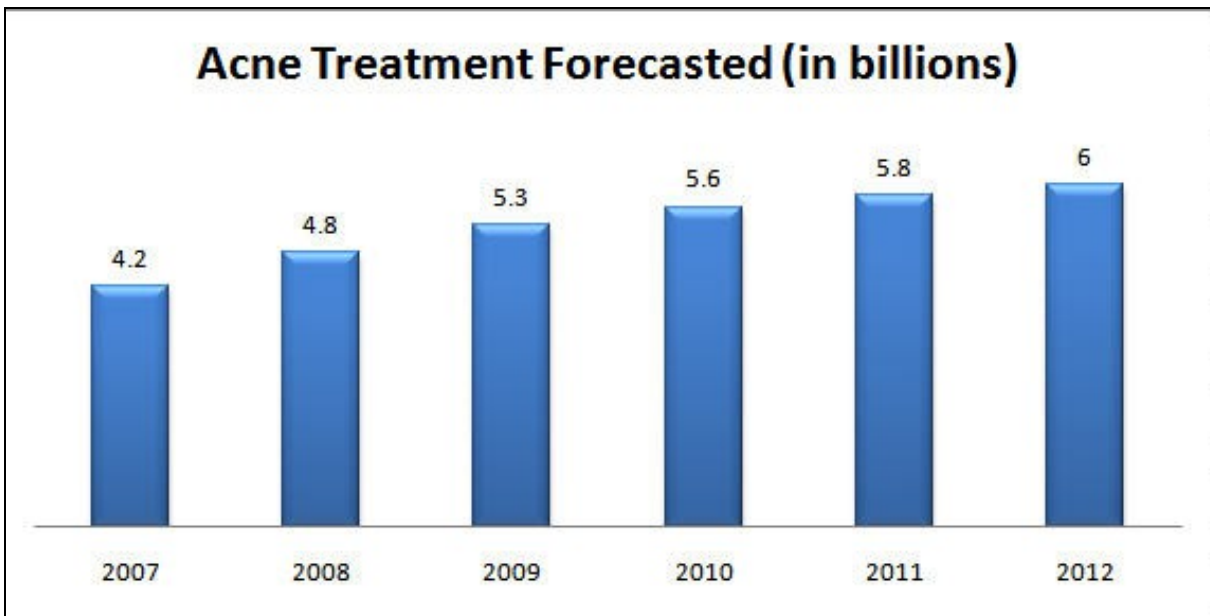
- Here, we had tried to categorize the the different products under following 3 categories.

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