

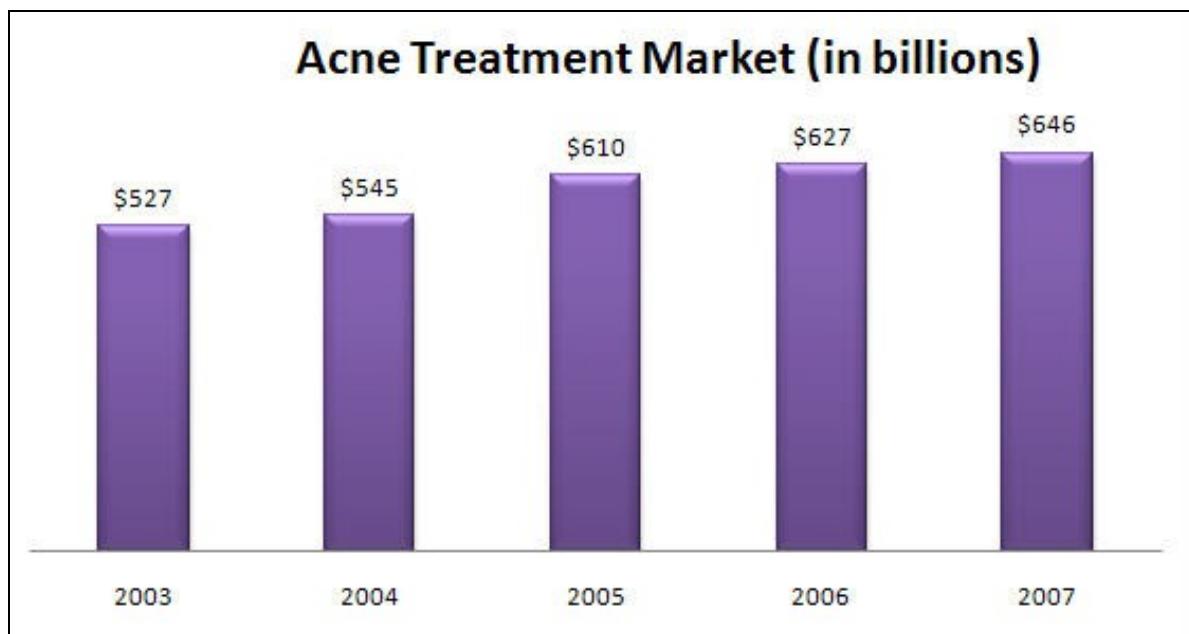
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## Historic Sales

- Anti-acne products sold through mass retail channels totaled \$646 million in 2007 to account for about 4% of all cosmeceutical sales. Subtracting these products from total sales translates to growth from \$12.4 billion in 2001 to \$15.6 billion in 2005?still a 6% CAGR.
- The sales figures are of OTC products only and not prescription drugs.

The sales figures are for Mass Channel (Mass channel includes mainstream supermarkets, chain drugstores and mass merchandisers)



Source

## Major Payers in Acne Space

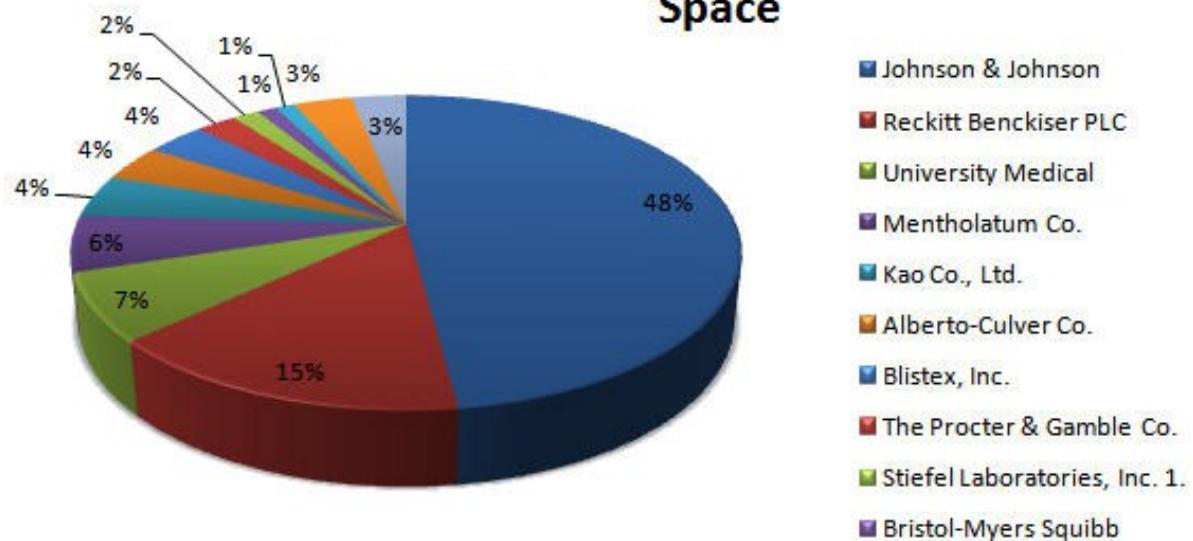
J&J commanded over 47% of anti-acne preparation sales in 2007. About 27 points of that share was yielded by the Neutrogena brand and another 16 points by Clean & Clear. J&J's closest rival was Reckitt Benckiser, which had only a 15% share, thanks to its early 2006 acquisition of Boots Healthcare and its time-honored Clearasil brand.

Share of U.S. Retail Dollar Sales of Anti-Acne Preparations in Mass Channels for 2007 are shown below Mass Channel (Mass channel includes mainstream supermarkets, chain drugstores and mass merchandisers).

Various Channels of Distribution:

- Mass channel includes mainstream supermarkets, chain drugstores and mass merchandisers.
- Prestige includes upscale-priced department stores (e.g., Bloomingdale's, Nordstrom), beauty chains (Sephora), brand-dedicated stores (Aveda, M.A.C.), salons and spas with retail counters, etc.
- Online Stores
- Direct Sales

## % Share of Major Player in Acne Treatment Space



Source

## Consumer Target Group & Product Categorization

### Consumer Target Group

Here we have divided entire population into various categories. These 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 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	Category	Target
Johnson & Johnson	<u>Ambi</u>	Moisturiser/Lotion/Cream	General Population	Mentholatum Co.	<u>OXY Body Wash</u> <u>2% Salicylic Acid</u> <u>Acne Treatment</u> <u>Island Wave</u>	Moisturiser/Lotion/Cream	Teen and Adult
Johnson & Johnson	<u>Aveeno Clear Complexion</u>	Moisturiser/Lotion/Cream	General Population	Mentholatum Co.	<u>OXY Face Wash</u> <u>Acne-Fighting Formula</u>	Moisturiser/Lotion/Cream	Teen
Johnson & Johnson	<u>Clean &amp; Clear Advantage Acne Cleanser</u>	Kits and Moisturiser/Lotion/Cream	Adult	Mentholatum Co.	<u>Oxy chill factor</u> <u>Face Scrub Acne treatment</u>	Moisturiser/Lotion/Cream	Teen and Adult
Johnson & Johnson	<u>Neutrogena Acne Stress Control</u>	Moisturiser/Lotion/Cream	Teen and Adult	Mentholatum Co.	<u>Phisoderm</u> <u>Anti-Blemish Body Wash</u>	Moisturiser/Lotion/Cream	General Population
Johnson & Johnson	<u>Neutrogena Advanced Solutions</u>	Moisturiser/Lotion/Cream	Teen and Adult	Mentholatum Co.	<u>Phisoderm</u> <u>Anti-Blemish Cleansing Pads</u>	Moisturiser/Lotion/Cream	Teen and Adult
Johnson & Johnson	<u>Neutrogena Clear Pore</u>	Moisturiser/Lotion/Cream	Teen and Adult	Kao Co., Ltd.	<u>Biore Blemish Fighting Ice Cleanser</u>	Kits and Moisturiser/Lotion/Cream	Teen and Adult
Johnson & Johnson	<u>Neutrogena Healthy Skin</u>	Moisturiser/Lotion/Cream	Teen and Adult	Kao Co., Ltd.	<u>Biore Warming Anti-Blackhead Cream Cleanser</u>	Moisturiser/Lotion/Cream	Adult
Johnson & Johnson	<u>Neutrogena Oil Free Acne Wash</u>	Moisturiser/Lotion/Cream	Teen and Adult	Alberto-Culver Co.	<u>St Ives Apricot Face Wash</u>	Moisturiser/Lotion/Cream	Teen and Adult
		Moisturiser/Lotion/Cream		Blistex, Inc.	<u>Stridex</u>	Moisturiser/Lotion/Cream	

Johnson & Johnson	<a href="#">Neutrogena On the Spot</a>		Teen and Adult				Teen and Adult
Johnson & Johnson	<a href="#">Neutrogena Men Skin Clearing Face Wash</a>	Moistureriser/Lotion/Cream	Teen and Adult	The Procter & Gamble Co.	<a href="#">Noxzema</a>	Kits and Moistureriser/Lotion/Cream	Adult
Johnson & Johnson	<a href="#">Neutrogena Rapid Clear</a>	Moistureriser/Lotion/Cream	Teen and Adult	The Procter & Gamble Co.	<a href="#">Olay Daily Facials Clarity</a>	Moistureriser/Lotion/Cream	Teen and Adult
Reckitt Benckiser PLC	<a href="#">Clearasil Daily Acne Control Vanishing Acne Treatment Cream</a>	Moistureriser/Lotion/Cream	Teen and Adult	Stiefel Laboratories, Inc.	<a href="#">Stiefel Panoxy</a>	Kits and Moistureriser/Lotion/Cream	Teen and Adult
Reckitt Benckiser PLC	<a href="#">Clearasil Acne Control Adult Acne Treatment Cream</a>	Moistureriser/Lotion/Cream	Teen and Adult	Bristol-Myers Squibb	<a href="#">Sea Breeze</a>	Moistureriser/Lotion/Cream	Teen and Adult
University Medical	<a href="#">University Medical</a>	Kits and Moistureriser/Lotion/Cream	Teen and Adult	Bristol-Myers Squibb	<a href="#">Sea Breeze Naturals Gentle Cream Cleanser</a>	Kits and Moistureriser/Lotion/Cream	Teen and Adult
University Medical	<a href="#">University Medical AcneFree Clear Skin System</a>	Kits and Moistureriser/Lotion/Cream	Adult	Nature?S Cure, Inc.	<a href="#">Nature?S Cure</a>	Moistureriser/Lotion/Cream	Teen and Adult

## OTC Products

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

[Link to Product Dashboard](#)