

## Health and Beauty Cosmeceuticals Industry and Market Expansion in Saudi Arabia

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### Abstract

**Background:** Cosmeceutical regulatory and legislation framework continue to play a significant role in beauty and care companies and biotechnology establishment and market expansion worldwide. Comparably, in local high quality cosmeceutical and international brands production and marketing innovations is one of the fastest growing sectors with economic benefits in the Kingdom. This article examines cosmeceuticals market landscape and investment opportunities insights important market investment, opportunities-driven demand and emerging economy in saudization and employment growth in Saudi Arabia.

**Results:** Our findings showed that there is a growing need to enhance and build partnerships and collaborations in improving pharmaceuticals including cosmeceuticals investments, networks and platforms to move forward market diversification and growth in the Kingdom. Moreover, adequate and efficient harmonization and regulatory processes are vital in accelerating the current empowerment, sustainable economic and social gains and benefits including increasing saudization. Fostering comprehensive health and beauty products regulatory compliance and capacity development in existing and new products premarket approval, ingredient control and labeling warnings and marketing best practices. Notably, constant cosmetovigilance nationwide is vital for evidence-based solutions in flourishing new cosmeceutical firms and market needs and demand. Promoting import and export minimize clearance approval barriers and challenges, scaling up market openness to international competition, while ensuring consumers safety is crucial.

**Conclusions:** Cosmeceutical industry and market has great potential to change population perception, acceptance, uptake and utilization of beauty and personal care products. With increasing fascination among young vibrant populations including annual large Muslim pilgrims and visitors, the cosmeceuticals product market partnerships and investment technology advancements should be supported in new emergence potential strategic market ties and solutions.

**Keywords:** Beauty; Cosmeceuticals; Care industry; Health; Economy; Saudi Arabia

### Introduction

Cosmeceuticals industry is one the fastest growing sector with the developing benefits of cosmetics and pharmaceutical mixture for health, esthetics and beauty. These products claim to abide to all medical/drug-like benefits and beauty ethical standards with national guidelines for consumers' protection and safety [1]. The emerging paradigm shift in global cosmeceutical market continues to be fuel by the growing demand which is increasingly fascinating amongst young and elderly population worldwide. The significant growing rate of cosmeceutical industry, innovative products and services for beauty and care is sprung by the science and technology advancements with the emergence of new natural drug-like beneficial ingredients from plan, marine and fauna [1,2]. It is documented that in 2013, the cosmeceuticals market was estimated at USD\$35 billion and is expected to growth around 7% and 9% between 2013-2018 and 2020 per compound annual growth rate (CAGR), respectively [2,3].

In the Saudi Arabia, the growing cosmeceutical business trend is been recognized for its potential market share growth and is expected to revolutionize positively consumers behavior and uptake from skincare, hair care, anti-ageing, anti-acne, sun protection to injective care products [3-5]. The Kingdom's large and buoyant economy has been a key growth market and potential investment focus for cosmetics companies and global brands retailers shops (LOreal, Bath & Body Works, Boots, Marks & Spencer, Clara, Halal cosmetics market include Inika, One Pure, LLC, FX, etc...) [3,5,6]. Moreover, the competitive landscape featuring amongst the major cosmetics industries analysis has been conducted on the key strategies to support their clients' optimal understanding and source of knowledge related to the cosmeceuticals market worldwide [5-7]. It is worth noting that cosmetics are defined as care/make-up substance used to enhance the appearance or odor of the human body, while esthetics deals with beauty and the beautiful. The industry covers different components including anti-ageing, growth factors, surgery and orthodontics, skin care, hair care, injectable and others esthetics products and services [6-8].

The rapid cosmetics growth including the Saudi beauty and personal care industries in recent years has been astonishing based on

several boosters factors such as growing young population, increasing disposable incomes and expansion of domestic and foreign cosmetics brands [7-11]. In addition, increasing internet marketing and online shopping sites, media advertisements and establishment of Western brands shops in major cities continue to promote brand awareness that shape cosmetics consumer behaviour and new fashionable culture. These, coupled with annual Muslims pilgrims' population and tourists, thus are increasing the demand for diverse personal care and beauty products in major cities in the Kingdom [9-15].

However, little is documented in peer reviewed literature on the cosmetics industry landscape opportunities, also how the increasing demand can play an important role in heightening Saudi economic and population wellbeing [2,5,16-19].

This article assesses the cosmeceuticals industry landscape and provides insights into new market investment opportunities-driven demand in accelerating. Saudization and economic benefits in the Kingdom.

### **Beauty and healthcare market landscape investment opportunities in Saudi Arabia**

Cosmeceuticals industry offer strategic industry investment and market opportunities for emerging companies including research and development, new products design, development and manufacturing, procurement and supply chain management, increasing urbanization and per capita expenditure, pricing regulation and pharmacovigilance demand and needs. Moreover cutting-edge technological transformation continue to stimulate new lifestyle adaptations, globalization related behavioural and cultural influences that enhance people and community perception and fashion on the acceptance, uptake and utilization of cosmeceuticals [8-11]. The enabling environment and appropriate pharmaceuticals or cosmeceuticals regulations and requirements provide ample cosmeceuticals market landscape investment opportunities in Saudi Arabia [9-12,13]. Over the last decade, strong commitment and investment that is responsible for rapid growth is expected to be competitive due to increasing consumers quality and brand demand and value-priced products driven by digital marketing and advertising awareness among customers for better health and wellness.

Saudi Arabia has a population of 28.828 million and a GDP of USD \$ 25961.8 dollars. Largest cities in Saudi Arabia include Riyadh, Jeddah, Mecca, Medina, etc. Cosmeceuticals market potentials to offer significant and fast growing segment of the cosmetics and personal care are attributable to drug-like traditional speculations benefits [2,3,14]. Hence, emerging cutting edge technology in technology and emergence of new and herbal ingredients coupled with digital marketing have further contributed to the progress in the marketing, awareness, acceptance and commercialization of cosmeceutical products and branded generics [15].

The shifting economic focus is already evident to build and enlarge their footprint in the "promised land" as these cosmetics markets offer potential solutions and increase reliance on local producers as well as increasing import-export of branded pharmaceuticals. Branded pharmaceutical products account for around 80% of the total pharmaceutical sales in Saudi Arabia, in as much Saudi authorities need to protect local manufacturing against the giant foreign brands [2,14,15].

Will domestic cosmetics firms are able to adapt to the growing and changing landscape consumers' needs and demand? The answers to this question requires further investigation into short and long term income per capita and the consumers' population disposable income as well the quality and cost of the such commodity. Interestingly, the establishment and proliferation of multiple free-zones in the Kingdom allow foreign giant firms to lure and seek establishment into the promising Saudi pharmaceutical manufacturing and market as well as pacing the regulatory process [16,17]. For example, King Abdullah Economic City (KAEC) has already attracted the attention of big pharmaceutical stakeholder's agreements such as Sanofi-Aventis and Pfizer manufacturing facilities, with increasing public tenders and competition dynamics of pharmaceutical and biotechnology firms close collaborative activities and value chain management expected sooner or later in the Kingdom [17-19].

### **Cosmeceuticals sources, formulation, applications and classification**

Research and development into cosmeceutical products can vary from the nature and origin, usefulness and purposes from various sources, natural synthetic and semi-synthetic. The trend and future implications of cosmeceuticals is fuelled from micro- and macro-fauna, flora and marine environment [20,21]. These are productive source of novel cosmeceuticals highlighting the potential development of novel effective and bioactive cosmeceuticals agents such retinoids, esthetics, surgery and orthodontics, anti-ageing and sunscreens, moisturizers, enzymes, hydroacids, depigmentation, proteins and peptides, and growth factors [22-24]. There are various formulation depending on the firms and the consumers' needs and varied from (skincare, hair-care, tooth whiteners, injectable, lipcare), chemical (antioxidants, sunscreens, acids, enzymes or hormones and botanical) to organic/biological or bio-products (Table 1). These products can use for specified purposes in beauty and personal care, with diverse mechanisms of action including 1) increasing exfoliation or normalization of cellular repair or response, 2) receptor activation and photoprotection, 3) skin barrier enhancement, 4) cellular messenger communication and provision, 5) up or down regulation and modulation of pigmentation and anti-ageing or anti-acne [20-25]. Furthermore, their applications have been showed with less scientific rationale to be beneficial and yet some still have documented scientific proof or rationale. These products can be used in diverse functions including personal consumption vitamins A, E, C, Q-10, glycosaminoglycans that increase collagen and help in xerotic and ichthyolytic disorders, skin barrier function, hydration, radiation and skin softening. Some are prescribed by physicians/dermatologists in photo-aging therapy, useful in aesthetic and dermatological conditions including tissue repair, wound healing promotion, skin growth, skin appearance elastin and collagen activation, wound healing promotion and skin growth or regeneration [26-29] (Table 1). It is worth noting skin care, antioxidant and injectable products are fast growing based on anti-ageing properties speculations benefits. However, more investment is required to increase the market and consumers size in the growing trend of competitors and giant pharmaceuticals such as Johnson & Johnson, Proctor & Gamble and L'Oréal [18,19,30,31].

Cosmeceutical applications	Mechanisms of action	Cosmeceutical products	Cosmeceutical demand and supply
<b>Chemical</b>	Increase exfoliation or normalization of cellular repair or response	Skin, Hair and Lip Care	Macroeconomic indicators & population
<b>Antioxidants</b>	Inhibition of oxidation and photoprotection	Age-Defying	Personal consumption Vitamins A, E, C, Q-10, glycosaminoglycans, increase collagen, help in xerotic and ichtilyotic disorders
<b>Retinoids and Sunscreens</b>	Receptor activation and photo protection	Acne Preparation and other Medicated Lotion	Physicians/ dermatologists in photo-aging therapy
<b>Moisturizers</b>	Skin barrier enhancement	Sun Protection and Tissue Filler Product	Skin barrier function, hydration, radiation and skin softening
<b>Enzymes, hydroacids, depigmentation</b>	Cellular messenger provision	Injectable and related product	Selected Aesthetic & Dermatological Conditions
<b>Proteins and peptides , and Anti-ageing</b>	Cellular messenger communication and	Botulinum Toxin	Tissue repair, wound healing promotion, skin growth, skin appearance elastin and collagen activation
<b>Growth factors and Anti-ageing</b>	Regulation of communication, cellular messenger and response	Hair Growth and Anti-Dandruff	R&D spending patterns, tissue repair, wound healing promotion, skin growth, skin appearance elastin and collagen activation
<b>Esthetics</b>	Modulation of pigmentation	Tooth Whitener	Partnerships and cooperative agreements
<b>Surgery and orthodontics</b>	Recovery and renewal	Other Cosmeceuticals	Acquisitions, ties & divestitures

**Table 1:** Global cosmeceuticals classification, mechanisms of action and applications in practice.

In recent years, marine cosmeceuticals compounds exploration in the marine/oceanic habitat has been performed for novel marine cosmeceuticals such as chitosan, marine fish and sponge derived collagens for enhanced cosmeceutical production via biotechnology sch RNA and nanotechnologies production [21,32,33]. Their application in the treatment of skin diseases, diabetes, and arthritis using advanced research on marine or fauna originated cosmeceutical substances evaluated [19-22,34,35]. The skincare industry is growing and its contribution for example to the US economy (measured by its industry value added, or IVA) has far outpaced general economic growth and is expected to continue during coming years [22,23,36,37]. Over the 10 years to 2020, IBIS World anticipates IVA to grow at an average annual rate of 8.2%; meanwhile, US GDP is forecast to increase at an annualized 2.5%. There is further need of research and development (R&D) investment in cosmeceutical products, coupled with technological advances in order to expand and underpin the cosmeceuticals industry's expansion and opportunities [1,2,37,38].

### Benefits of local cosmeceuticals stakeholders partnership and investment

The global cosmeceutical market is projected to grow at a CAGR of 8.62% from 2014-2019. It is anticipated that the global cosmeceutical market will hit USD \$61 billion by 2020 majorly driven par consumers desired maintain the skin/body care, beauty and resolve the imperfections and anti-ageing [1,29,30,31]. Personal care and beauty industries have the ability to improve Saudi import and export transactions and market (e.g., Banaja Saudi Import Company, Spimaco, Tabuk Pharmaceutical and Biotechnology Manufacturing and Al-Jazeera Pharmaceutical Industries), population income growth, employment and increasing the appetites for quality healthcare and hygiene under the regulation, supervision and coordination Saudi Food and drug Authority (SDFA) and other government stakeholders

agencies [6,8,24,25, 32,39,40]. The prediction showed that new ingredients will continue to be developed in this sector locally from plant, animal and marine sources [1,2,27,33,41].

Local cosmetics firms' production and market have the opportunity to increasing their momentum with over 27 pharmaceutical manufacturers operating in the Kingdom and accounting for about 18% of the national market value from generic branded manufacturing [6,9,42]. Domestic players are mostly focused on branded generics manufacturing or license agreement with Pfizer, GSK and J&J pharmaceutical firms [43,44]. Moreover, the government has the responsibility to support the local value chains, nurturing capital for joint ventures and sponsoring price regulation and good practices as well as mitigating R&D into drugs and drug-like products innovations [24,27,44,45].

### Forecasting the future of cosmeceutical industries development

Forecasting cosmeceutical industries growth and performance in enhancing beauty and personal care will continue to conditioning considerably the cosmeceutical industry, however the outpaced of digital and media marketing will provide stronger value growth worldwide [27,33,41]. It is expected that Saudi cosmetics market growth will continue due to the growing traditional and western lifestyle young population, rising disposable income, leading domestic and international stakeholders, substantial government expenditures and strong economic growth [23,28,36]. Moreover, understanding of local market dynamics, strong local partnership and collaboration, strategic alliances or in-licensing agreements, mutual beneficial joint ventures are active mechanisms for investment and attractive business opportunities [1,2]. Likewise, liaising with big pharmaceutical firms with strong brand equity, advanced technical know-how and capital,

R&D capabilities to scale up supply and economy of scale [2,4,30,37,38,41]. The quality of beauty service delivery and outcome of the new generation of biological products activities and beneficial applications is importance. In such, functional cosmeceutical bioactive ingredients isolation and characterization should be ascertained scientifically valuable for healthcare and beauty [39,40,46]. Development of innovative drug-like products for personal care and beauty requires establishment of infrastructures and facilities to support manufacturing and local employment as well as nurtured legal environment suitable of protecting and securing intellectual property rights (IPR) and propelling market and return of investment [2,5,21,23].

It is projected that health and beauty specialists will remain the leading distribution channel up to 2019, ahead of beauty specialist retailers shops, care centers and pharmacies for specialized/branded personal care and beauty products[40,41,47,48]. This is expected to be due to the wide selection of the latest products available ahead of other distribution channels. The popularity of all three top distribution channels is mainly due to consumers' preference to be able to get product information on the spot from knowledgeable consumers and diverse target groups in the entire cosmeceutical landscape [24,27,28,42,49]. Importantly, exploring and establishing consumers penetration, acceptance and uptake strategies including beauty esthetics and orthodontics private healthcare providers and insurers are other alternative channels to ease domestic manufacturers or retailer of branded generics [5,8,29,50].

It is clear that as the Kingdom market-driven transition model will continue to grow, leveraging on local and regional cosmetics manufacturing resources [5,8,18,23,25,43]. With the increasing public spending on healthcare as CAGR rise from 13.5% to 17.3% in 2009 and 2012, expansion of new brand and generics acquisitions and capacity need to be scale up significantly with related support from India and China pharmaceuticals competitiveness in generic price of these products [24,27,30,51].

### **Promoting cosmeceuticals industry in Saudi economy dynamism and prosperity**

Cosmeceuticals have become the fastest growing segment of the cosmetics and personal care Industry. The need to build brand equity at regional and global level could help to leverage the rise of low cost/price-focused generic and pave ways to strengthening stakeholders' investment, new products or brands development and establishment in ensuring industry sustainability and productivity[2,5,30,41]. Nevertheless, the extent and nature of cosmeceuticals firms also poses specific challenges related to branding versus corporate branding management, local regulation, product patent and clearance, consumer target to marketing niche on case by case basis [25,28,31,47]. The benefits of advancing beauty and care continue to dominate the scenery and boost the good value-based services and performance. The leading category amongst the two in terms of increased growth was mass beauty and personal care. This is expected to be due to rising consumer awareness concerning the benefits of better hygiene and anti-bacterial products mainly through advertising in online websites, print media, in-store promotions and on satellite TV channels [25,28,30,52]. It is worth noting that the paradigm shift in consumers acceptance and uptake of beauty and personal care products continue to be significant and gradually coupled with grooming patterns of lifestyle adaptations and economic transformation in the Kingdom [31,32,41,42]. In addition, men's grooming products saw a good

growth performance as more men in Saudi Arabia respond to increased advertising on satellite TV channels linking good hygiene and stylishness to a successful professional life, especially in men's premium fragrances and men's skin care products [3,8,13,17,45]. Arabian Oud retains leading position in premium fragrances in 2014 and continued to be the leading player in overall beauty and personal care in 2014 [28,43,53]. This is expected to be due to its reputation of providing the highest quality natural Oud and Klobook products, which has allowed its brand share in premium fragrances to continue to register increased growth in 2014. There is also an increasing competition between Saudi Oud and Premium Fragrance competitor, Abdul Samad Al Qurashi Co. with other branded cosmetics products [24,26,29,44,54]. Interestingly, beauty and personal care products such as Binzagr Lever (Unilever Arabia), Procter and Gamble Arabia top the list, followed by Abdul Samad Al Qurashi Co with a number of men's, women's and unisex fragrances [24,25,45]. Importantly, the increasing personal care and beauty needs of the growing Saudi population and pilgrims continue to lure the promise of greener economic pastures, public and private cosmeceuticals sectors market investment expansion [19,30,47,55].

### **Conclusion**

Domestic and international cosmeceutical and pharmaceutical industries should capitalize on the Saudi Arabia strategic positioning and advantages in the regional and global market landscape opportunities for large scale investment. The value in creating and building-up of strong cosmeceutical brand and new products equity architecture models enhanced by digital media and online marketing is crucial for clients/consumers' awareness, taste and satisfaction greater economic dynamism. Building and implementing governments enabling environments in fostering public and private stakeholders' commitment and investment, regulations and strong intellectual property rights is needed to enhance local/global trade and financial flows in sustainable Saudi economic diversification and prosperity.

### **Conflict of Interest:**

No competing interests were disclosed.

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