

## Case Study

# How We Helped an **FMCG** Player Unlock Growth Opportunities in **Skin Microbiome Modulation** for a Competitive Edge

## Objective

A leading FMCG player in the cosmetics and personal care sector engaged us to unlock value from their R&D efforts, focusing on skin microbiome modulation. The client aimed to identify high-potential, underexplored modulation mechanisms and develop a roadmap for disruptive product launches, going beyond traditional formats and facial care. The study required navigating complex layers such as mapping industry activity, analyzing technology gaps, exploring body-zone innovations, and prioritizing modulation mechanisms with the highest potential for disruption.

## Our Strategic Approach

To uncover unexplored growth spaces in skin microbiome innovation, we implemented a multi-layered, insights-driven approach designed to combine competitive intelligence with an actionable R&D strategy.

### Competitive & Innovation Landscape Mapping

We conducted a comprehensive analysis of global players and top patent assignees, segmenting the market by modulation mechanisms, delivery formats, and target skin concerns. This structured mapping revealed saturated innovation areas alongside clear whitespaces that could be leveraged for competitive advantage.

### Technology & Product Segment Whitespace Analysis

We applied visual matrices to identify underrepresented formats, neglected body zones, and low adoption of advanced mechanisms such as Phage Therapy, Microbiota Transplants, and Engineered Commensals—particularly outside facial care applications.

### Investment Prioritization Matrix

Each modulation mechanism was evaluated based on the business unit strength and industry attractiveness. This ranking revealed high-disruption opportunities and mechanisms with strong innovation positioning.

## Whitespace/Grey Area

Our analysis pinpointed several key areas for improvement, including a narrow focus on probiotics/prebiotics in facial serums, limited multi-zone innovation, regulatory uncertainty around live biotic ingredients, and the absence of standardized microbiome-specific efficacy endpoints, along with safety considerations for sensitive demographics.

## Intervention Strategy

We developed a targeted pathway involving zonal and age-specific microbiome profiling, strategic partnerships with biotech innovators, application of Phage Therapy in advanced delivery systems, and building regulatory-ready clinical validation frameworks.

## Snippets

### TOP PLAYERS IN ACTION

#### TOP ASSIGNEES VS DELIVERY SYSTEMS

ASSIGNEE/DELIVERY SYSTEMS	SERUMS	CREAMS	CLEANSERS	MOISTURIZERS	TONERS	DEODORANTS	GELS	SPRAYS	MASKS	POWDERS
EVONIK INDUSTRIES	Target	Maintain	Target	Expand	Maintain	White-Space	Target	White-Space	Expand	White-Space
GIVAUDAN	White-Space	White-Space	White-Space	White-Space	White-Space	Target	Target	White-Space	White-Space	White-Space
AMOREPACIFIC	Target	Target	Target	Expand	Target	White-Space	Expand	White-Space	Expand	White-Space
SHISEIDO GROUP	Target	Target	Target	Expand	Target	White-Space	Expand	White-Space	Expand	White-Space
L'ORÉAL	Target	Target	Target	Expand	Target	White-Space	Expand	White-Space	Expand	White-Space
DSM FIRMENICH	Maintain	Maintain	Maintain	Maintain	Maintain	White-Space	Maintain	White-Space	Maintain	White-Space
AOBIOME	White-Space	White-Space	White-Space	White-Space	White-Space	White-Space	White-Space	White-Space	White-Space	White-Space
PSOMAGEN	White-Space	White-Space	White-Space	White-Space	White-Space	White-Space	White-Space	White-Space	White-Space	White-Space

#### TOP ASSIGNEES VS SKIN CONCERNS

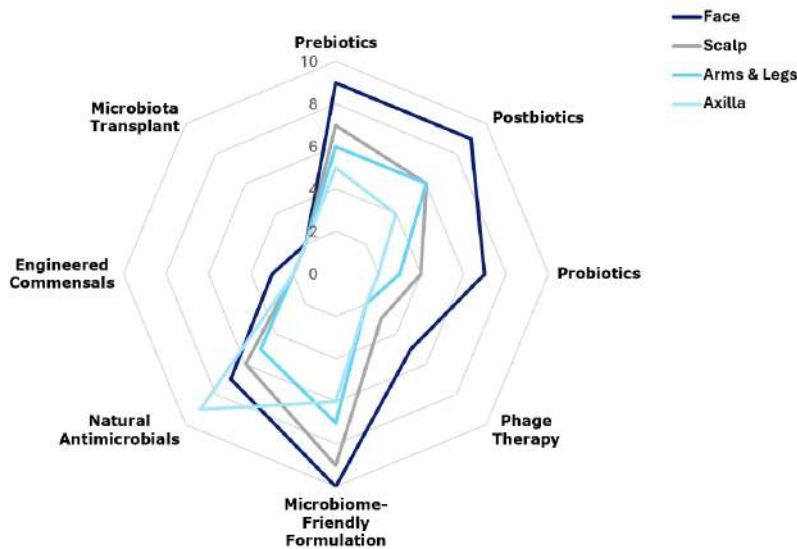
ASSIGNEE/SKIN CONCERNS	ANTI-AGING	ACNE	ATOPIC DERMATITIS	ROSACEA	PSORIASIS	SKIN SENSITIVITY	WOUND HEALING	UV PROTECTION	BODY ODOR	SCALP HEALTH
EVONIK INDUSTRIES	Maintain	Target	Maintain	Maintain	Maintain	Expand	Maintain	Expand	White-Space	Expand
GIVAUDAN	Maintain	Target	Maintain	Maintain	Maintain	Maintain	Maintain	Expand	White-Space	Expand
AMOREPACIFIC	Target	Target	Target	Expand	Maintain	Expand	Expand	Expand	White-Space	Expand
SHISEIDO GROUP	Target	Target	Target	Expand	Maintain	Expand	Expand	Expand	White-Space	Expand
L'ORÉAL	Target	Target	Target	Expand	Maintain	Expand	Expand	Expand	White-Space	Expand
DSM FIRMENICH	Maintain	Target	Maintain	Maintain	Maintain	Maintain	Maintain	Expand	White-Space	Expand
AOBIOME	White-Space	Target	White-Space	White-Space	White-Space	White-Space	White-Space	White-Space	White-Space	White-Space
PSOMAGEN	White-Space	Target	White-Space	White-Space	White-Space	White-Space	White-Space	White-Space	White-Space	White-Space

## TOP MICROBIOMES VS SKIN CONCERNS

MICROBIOMES / SKIN CONCERNS	ANTI-AGING	ACNE	ATOPIC DERMATITIS	ROSACEA	PSORIASIS	SKIN SENSITIVITY	WOUND HEALING	UV PROTECTION	BODY ODOR	SCALP HEALTH
<i>Staphylococcus epidermidis</i>	3	3	4	3	2	4	4	4	2	3
<i>Cutibacterium acnes</i>	2	4	2	3	2	3	2	2	3	4
<i>Lactobacillus rhamnosus</i>	3	2	4	3	3	4	3	2	2	2
<i>Bifidobacterium breve</i>	3	2	4	3	3	4	3	2	2	2
<i>Lactobacillus acidophilus</i>	3	2	4	3	3	4	3	2	2	2
<i>Bacillus subtilis</i>	2	2	2	2	3	3	4	3	3	3
<i>Propionibacterium acnes</i>	2	4	2	3	2	3	2	2	3	4
<i>Pseudomonas aeruginosa</i>	2	2	2	2	2	2	3	2	3	2
<i>Streptococcus thermophilus</i>	3	2	3	2	2	3	2	2	3	3
<i>Corynebacterium species</i>	1	2	2	2	2	2	2	3	4	2

**Note\*** - The values in the heat map represent the level of influence each microbiome has on the skin concern.  
**Value 4** indicates a **strong influence** of the microbiome on modulating the skin concern.  
**Value 3** signifies a **moderate influence**, where the microbiome has a noticeable impact on the skin concern, and research or interventions are showing positive results.  
**Value 2** reflects a **low influence**, meaning the microbiome has some relevance to the skin concern, but further exploration is needed to fully understand its potential.  
**Value 1** represents a **White-Space Area**, indicating significant potential for further research or application in this area.

## MODULATION MECHANISM VS BODY ZONES



### INSIGHTS

As per the Radar Graph mapping Modulation Mechanisms vs Body Zones, it is evident that Microbiota Transplant and Engineered Commensals remain underutilized across key zones such as the face, scalp, arms/legs, and axilla, highlighting a clear growth opportunity. Additionally, while Phage Therapy also shows limited deployment across most body zones, a notable uptick in utilization is observed for facial skin concerns, indicating early traction in that specific area.

MODULATION MECHANISM VS SKIN CONCERNS

Represents Strong Research  
Represents Moderate Research  
Represents Low Research  
Represents White-Space

	ANTI-AGING	ACNE	ATOPIC DERMATITIS	ROSACEA	PSORIASIS	SKIN SENSITIVITY	WOUND HEALING	UV PROTECTION	BODY ODOR
PREBIOTICS									
PROBIOTICS									
POSTBIOTICS									
PHAGE THERAPY									
MICROBIOME-FRIENDLY FORMULATION									
MICROBIOTA TRANSPLANT									
NATURAL ANTIMICROBIALS									
ENGINEERED COMMENSALS									

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Impact

We assisted the client in:

- Defining clear paths for expansion into new zones and formats.
- Identifying three high-impact mechanisms for R&D priority.
- Positioning them as a leader in clinically backed, targeted microbiome solutions.
- Transforming the pipeline from a single-mechanism focus to a balanced, disruptive portfolio.

Conclusion

Through an integrated approach combining competitive intelligence, whitespace analysis, technology prioritization, and targeted intervention strategies, the client was able to unlock significant growth potential in the skin microbiome space. This approach enabled a shift from iterative product development to pioneering clinically validated, multi-zone innovations, equipping the brand with a differentiated, future-ready portfolio and a competitive edge in a rapidly expanding market.

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