CHAPTER TWO

PROFILE OF COSMETICS AND THE COSMETICS INDUSTRY

2.1 INTRODUCTION

All human beings have an urge to look beautiful. To add beauty people use different types of materials from time immemorial. In early period cosmetics were associated with religious practices. It is almost true for all old civilizations like Indians, Chinese, Egyptian and Greek. The word ‘Cosmetics’ arises from a Greek word ‘Kosmeticos’ which means to adorn. In early period, all cosmetics were made in home with natural materials like aromatic materials, spices, herbs, resins, dyes, fats, oils and perfumes. Egyptian physicians specialised in various branches of their art in the preparation of cosmetics. In olden days cosmetics were unearthed from tombs, temples and other religious places. The current size of cosmetics and toiletries market is about ₹ 4,300 crore, out of which the fastest growing market is of colour cosmetics accounting to ₹ 275 crore. The hair care products account for ₹ 900 crores. There has been an increasing trend in the use of herbal cosmetics and personal care products especially in skin care segment and it accounts for ₹ 450 crore. The market segment for toiletries is also well developed and is dominated by MNCs and few Indian companies. There are about 15 to 20 companies in the organised sector and myriad in unorganised sector. Most of these companies are MNCs like HUL, P&G, Godrej, Emami and L’Oreal.

The present chapter highlights the profile of the cosmetics and the product profile of leading cosmetics industrial enterprises in India. A brief introduction about the standard for cosmetics, history and development of cosmetics,

regulations related to cosmetics and cosmetics industry, classification of cosmetics, type of cosmetics for skin such as face powder, fairness cream, face powder, cosmetics for hair, hair care preparation like shampoo, hair colorant, shaving cream, hair oil and introduction about dentifrices like tooth powder, tooth paste and mouth washes are covered. A simple introduction about the leading cosmetics manufacturing companies like HUL, Emami, P&G, ITC, Dabur India Limited, Godrej Company Limited and Colgate-Palmolive Company is also presented in this chapter.

2.2 HISTORY AND DEVELOPMENT OF COSMETICS

In fourth century B.C., after the conquest of Persia by Alexander, a new culture developed in which arts of medicine and cosmetology greatly advanced. “Hippocrates, the father of medicine advocated correct diet, exercise, sunlight, special bath and massage for good health and beauty”\(^3\). In 47 B.C Julius Caesar occupied Alexandria. The Romans took over everything. In the next three centuries, the act of cosmetics and cosmetology along with Greek medicine developed very much and reached unprecedented heights. One notable person of this period was Queen Cleopatra. She is renowned for her makeup till now. Cleopatra painted her eyebrows and lashes a stark black, her upper lids blue black and the lower ones as greens the Nite. She also liked to take bath in ass milk. She has taken much care for her skin and beauty maintenance.

Skin care particularly the use of creams, dates back over 5000 years. The people of the ancient tribal state of Ublu in Korea, softened their skin with pig’s oil\(^4\). The ancient Romans were very keen on beauty aids. But the beauty industry today did not really begin until the 19\(^{th}\) century. A hundred years ago there were few products within the reach of the average women and if there have been many women would have declined to use them\(^5\).

\(^4\) “Cosmetics part of a time old tradition”, Soaps detergents and toiletries Review June 1993.
In India, during Gupta period, cosmetics hygiene was quite advanced. Ladies used many types of creams, oils and paste. Hair dyes were also used. Men used oils before bath. They also used hair oils and perfumes. Almost everything made in the home by using vegetables, seeds, flowers like rose, jasmine and so on. Rose was introduced from China. In India it was widely cultivated for rose essence and rose water. India maintained its supremacy in cosmetic industry over several centuries. Products like cassia, cloves, nutmeg, musk, myrrh, tamarind and rose from India were adopted as perfumes and flavour. Hindus used various cosmetics for their facial designation, where Persians paid particular attention to their hair and beard. In those days cosmetics were treated like the medicine. The first move to separate cosmetics from medicine was made by a Norman Henry de Mondevilla, a lecturer on anatomy and medicine. He clearly distinguished pathological conditions of the skin that needed medical treatment and other conditions which required cosmetics applications in his book titled “Inventarium or Chirurgia magna” which was translated into eight languages in a short time. The broadening of knowledge of medicine and surgery resulted in dropping of cosmetics from medicines. In addition, two French Physicians published a comprehensive text on beautification, and Jean Liebant wrote books on general health, toxicology and cosmetics. They contributed a lot to cosmeticlogy.

England was fast to adopt the cosmetics innovations from the continent. During the Henry VIII and Elizabeth period perfumery and cosmetics of all kinds were lavishly used. Face powder and tooth whitener became popular in this period. Queen Elizabeth’s golden-red hair became fashion. Development of cosmetics in American colonies followed the trends in parent countries like England, Spain, Portugal and France. Two factors contributed greatly to the development of cosmetics industry during the 18th century. They are Establishment of Newspaper and Legitimate Pharmacy.

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6 Ibid.
The First World War created many problems to the cosmetics industry especially non-availability of perfume grade alcohol. After post war recession, chemical and cosmetics industries started developing. During 1920s beauty saloons flourished all over Europe and America. But 1930s were years of economic slump. When the world was recovering from this slump, Europe was plunged into World War II. Post World War II period has been the period of growth of chemical pharmaceutical industry and cosmetics industry. Availability of synthetic colours and pigments and detergent revolutionised cosmetics industry.

In India, perfumery had developed long back and many essential oils known as “attar” were being used for beautification and were being exported. Henna has been used traditionally for colouring palms and hair. Except for a few MNCs like HUL, O’Learl, Ponds, the cosmetics industry has been a small scale industry in India. Even though the cosmetics business was running in small scale, all kind of cosmetics are manufactured and marketed in India.

2.2.1 Regulation of Cosmetics and Cosmetics Industry

Manufacture, import, sale or distribution of cosmetics was not being regulated in India prior to 1962. In early sixties, it became necessary to regulate import, manufacture and sale of cosmetics due to prevalence of misbranded and/or spurious cosmetics. Cosmetics were brought within the purview of the Drugs Act 1940 and the name of the Act was changed to the Drugs and Cosmetics Act, 1962.

According to Drugs and Cosmetics Act 1962, Cosmetics has been defined as “any articles intended to be rubbed, poured, sprinkled or sprayed on or introduce into, or otherwise applied to, the human body or any part thereof for cleansing, beautifying, promoting attractiveness, or altering the appearance and includes any articles intended for use as a component of cosmetics”. Twenty eight cosmetics have been placed under Schedule to the rules of the Drugs and
Cosmetics Act, 1962 and are required to comply with Indian Standard. They are skin powders, skin powder for infants, tooth powder, toothpastes, skin creams, hair oils, shampoos, soap based, synthetic detergent based, hair creams, oxidation hair dyes, liquid, cologne, nail polish (nail enamel), aftershave lotion, pomades and brilliantine’s, depilatories, chemical shaving creams, cosmetic pencils, lipsticks, toilet soap, liquid toilet soap, baby toilet soap, transparent toilet soap, shaving soap, lip salve, powder hair dye, Binid (liquid), “Kumkum” powder and Henna powder.

The cosmetics manufactures are instructed to follow the BIS standards for making the cosmetics. The following Table 2.1 illustrates the BIS standard numbers of important cosmetics in India.

<table>
<thead>
<tr>
<th>Sl.No.</th>
<th>Name of the Product</th>
<th>IS No.</th>
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<tbody>
<tr>
<td>1</td>
<td>Skin powders</td>
<td>IS – 3955</td>
</tr>
<tr>
<td>2</td>
<td>Skin powders for infants</td>
<td>IS – 5339</td>
</tr>
<tr>
<td>3</td>
<td>Tooth powder</td>
<td>IS – 5383</td>
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<td>4</td>
<td>Tooth paste</td>
<td>IS – 6356</td>
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<td>5</td>
<td>Skin creams</td>
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<tr>
<td>6</td>
<td>Hair oils</td>
<td>IS – 7123</td>
</tr>
<tr>
<td>7</td>
<td>Shampoo – soap based</td>
<td>IS – 7669</td>
</tr>
<tr>
<td>8</td>
<td>Shampoo – synthetic detergent based</td>
<td>IS – 7884</td>
</tr>
<tr>
<td>9</td>
<td>Shaving creams</td>
<td>IS – 9740</td>
</tr>
<tr>
<td>10</td>
<td>Powder Hair Dyes</td>
<td>IS – 10350</td>
</tr>
<tr>
<td>11</td>
<td>Henna powder</td>
<td>IS – 11142</td>
</tr>
</tbody>
</table>

**Source:** BIS Standard of Cosmetics

In nutshell, cosmetics mean any material used for beautification or improvement of appearance of human beings. Earlier both male and female were equal competitors for improvement of appearance. Male decorated themselves with animal parts and vegetable leaves where female did so by wearing any coloured stones or flowers round their neck and the wrists. The cosmetics in
general are external operations and are meant to be applied to external parts of the body. All cosmetics are formulated as solids, semisolids, or liquids. The cosmetics taken for the study are classified as.

a) Cosmetics for skin care  
b) Cosmetics for hair care and  
c) Cosmetics for tooth care

2.3 COSMETICS FOR SKIN CARE

The skin covers vast area of body and cosmetics are applied to skin there of. The most important part of the human being is the face. The skin complexion of the people is the result of melanin count in the skin. Cosmetics for face are formulated in the form of solids, semi-solids and liquids. The solids consist of powders with different degrees of flow and angle of repose or of compacts. The semi-solid may be emulsions or simple admixtures and liquids are both monophonic and biphasic.

The solid products consist of face powders, body powder, compacts and moulded products like lipsticks. The skin is not only a protective covering but it controls loss of valuable fluids, prevents penetration of toxicous foreign materials and radiation, cushions against mechanical shock and regulates heat loss and transducers incoming stimuli. It also, by its colour, texture and odour, transmits sexual and social signals. The skin has several layers. The overlying outer layers are called epidemics.

Normally the skin is very smooth. Due to aging and exposure to heat and cold, sunrays pressure and abrasion, dust and microbial infection, the smoothness may be lost and the skin becomes rougher and thicker. Aging also produces wrinkles on the skin surface. In addition it gives dullness to the face. To overcome these problems people go for cosmetics usage. The cosmetics

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consists of face powder, skin creams, lotions, face pack, nail polishes, lipsticks and compacts and those which supplement the natural functions of skin. In the present study the cosmetics for skin covers fairness cream, face powder, toilet soap and perfume.

2.3.1 Skin Creams and Lotions

The word “Cream” means a solid or semi-solid emulsion which is extensively used for skin beautification. If an emulsion is of much low viscosity that can be poured under influence of gravity alone, it is termed as lotion. Water is an important ingredient of skin creams and lotion as moisture content of the skin controls the appearance of the skin. Cosmetics emulsions contain a number of ingredients such as carbohydrates, proteins and sterols, which support growth of micro-organisms. Cosmetics creams are usually marketed on the basis of their broad claims made on the company packaging. They vary in appearance, texture, subjective feel, case of spreading etc., far outstrip the number of functional categories and a considerable amount of overlap is inevitable. Most commonly available creams are fairness creams, cleansing creams, cold creams, massage creams, night creams, moisturizing creams, foundation creams, vanishing creams, hand and body protect creams and all purpose creams.

2.3.2 Fairness Creams

Colouring skin, particularly skin of face and lips is an ancient practice. Today also the use of such products has increased and choice of shades of colours, texture, and lustre have been changed and become wider. Apart from normal daily life, skin colorants are also used for drama, circus and dance. The skin colorants are also called as ‘Beauty Aids’, but they are different from other cosmetics. The sole purpose of skin colorants is alteration of appearance for enhanced attractiveness whereas other cosmetics have other specific functions of maintenance or promotion of the skin health along with or without decorative functions. Fairness cream preparations are used to hide small
blemishes or symptoms of aging. They are also used to create a well-groomed appearance and demonstrate the desire to impress upon others.

Fairness creams are applied to attract the opposite sex and to be noticed upon. The motives can be termed as psychological. Manufacturers try to make these as decorative, pleasant, fragrant, coloured, non-tacky and harmless. Foundation cream is used as a base make-up to powder make-up. The idea of foundation make-up came to overcome this two-step process and the trouble with it. Foundation make up in various forms, particularly liquid has become so popular in India. The reason being the liquid foundation make-up is much easier to apply than powder and a smooth appearance can be obtained. Though the presence of surfactants may make the colours or pigments penetrate the hair follicks and fissures epidermis if not completely removed. Still it has some popularity. The main ingredients in fairness creams are Lanette wax, Stearic acid, water, glycerin, powder base colour and perfume preservative.

2.3.3 Face Powder

One important category of skin care preparation is powders and compacts. They are widely used for face and body care, not only by women but also by men. There are body powders, which are also known as dusting powders or face powders and compacts. Medicated powders are used for prickly heat or preventing microbial growth on skins. Powders such as deodorant powders, foot powders are used for specific purposes. Talc is an exceedingly common mineral and occurs in large beds crystalline schists together with serpentine, doromite and chorite. It is an ingredient in soap, lubricants, tailor’s chalk or french chalk and pigments, and it is used for face powder[^8].

Face powders are the largest selling single item among cosmetics. The application of face powder either directly to the body provides a finishing touch to any make-up process. The modern women and men believe in

concealing undue gloss or shine on the face and body. Face powder covers-up minor skin blemishes and gives a smooth finish to the body. Besides modern face powder is suitably tinted and perfumed so that they make the skin look good. The face powder should be harmless and must look natural. It should spread evenly, stay on well and be almost invisible, yet giving a suitable glow to the body and a peach-like finish. Moreover it should be pleasantly and delicately perfumed and contains right degree of opacity or covering powder.

Functions of face powder include imparting of smooth finish to the skin, masking of minor visible imperfections, and masking of shine due to moisture of grease. Desired qualities in a face powder are look natural, have lasting properties, resistant to mixed secretions of the skin, serve as a vehicle for perfume and be an absorbent.

Face powder is an indispensable article of a lady’s cosmetic range. From the mask-like covering in ancient times to the natural look which is the choice of the present day face powders have been and still remain one of the bares of the cosmetic industry. A face powder is basically a cosmetic product which has as its prime function the ability to complement skin colour by imparting a velvet finish to it. Tinted, shiny face powder enhances the beauty of modern woman and make her more attractive than she has ever been in the past.

Face powder can be classified into three categories dry, normal or moderately oily and very oily. Dry skin requires light powder which possesses slight covering power and large quantity of talc. Normal skin requires high covering powder with lesser talc and balanced by zinc oxide.

2.3.4 Toilet Soap

Bath preparations are formulated for different purposes. A bath preparation may serve to give the user refreshing feeling, to soften hard water, to impart pleasing effect to the bath by addition of colour and perfume and to clean the body of dirt and odour.
Soap is most frequently used bath preparation. In the field of cleansers, bath soap is the most generally used detergent. While bath soaps are often assigned special properties they are little different from ordinary toilet soap except in size and shape. The great proportion of bath soaps consist of milled, tallow soap base suitably perfumed and coloured to meet the consumer’s fancy. Palm oil and olive oil soap at times featured as superior soaps for bathing. The use of soap is aerated to float in the bath tub so it can readily be seen. This convenience is propagandised by certain soapier. Special soaps for bathing which consist largely of coconut oil are sold as specialized bath soaps.

2.3.5 Perfumes or Deodorant

The term ‘fragrance’ and perfume are synonymous and used interchangeably. Perfume impacts a scent or odour, including a sweet and pleasant smell while a ‘fragrance’ is a sweet smell emitted by a material or object. Perfumes are used to enhance the smell or fragrance. Ancients used perfume, especially sandalwood and musk to conceal body odour. The actual odour of the human being is the sum of the natural and acquired odour. The intensity of the body odour differs from person to person, depending upon personal circumstances, eating habits, social environment and psychological conditions. Perfumes and colognes vary considerably in alcohol strength and perfume concentration. A deodorant is a cosmetic substance that masks or reduces axillary odour though the perfumes or fragrance. Deodorants have a topical effect only and are regarded as toiletries. An anti-per spirant is also a deodorant but a deodorant is not necessarily an anti-per spirant. A wide variety of deodorants and not anti-per spirants have been successfully marketed. The deodorants are available as sticks, powders, soaps and sprays.

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Some commercial brands of perfumes are

- Rexona – Deodorant stick
- Rexona – cotton dry – women
- Godrej Cinthol – Deo Soap Face Powder
- Nivea – Deodorant spray
- Nivea – Deodorant for men
- Park Avenue – ‘Cool Blue’, Body deodorant
- Park Avenue – ‘Success’, Body deodorant
- Fa

### 2.4 COSMETICS FOR HAIR

Hair can be defined as modified epithelial structure formed as a result of Keratinization of germinative cells. A number of products are used on the hair by both men and women. Hair care products have been the fastest growing segment of the personal care market. The size of the shampoo market expanded two-and-a-half times during the last decade. The size of the shampoo market is estimated at over ₹ 25 billion corresponding to some 60,000 to 70,000 tonnes of the material. Besides, the untapped market has a big potential, especially the rural segment. All the hair care products can be classified as

- Hair cleansers
- Hair dressings
- Hair wavers, cueless and straightness
- Hair tonics
- Hair removers
- Hair dyes and bleaches (Hair colorants)
- Shaving preparations

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The hair and the skin are closely related. As a matter of fact, the hair is a part or appendage of the skin. Hair is made up of an insoluble protein material, keratin, vestigial cell membranes and nuclei. The supplier of shampoo makes the advertising to create the amplification thought in the consumer’s mind like to build the idea that a crowning glory of beautiful hair is dependent upon using a particular hair cleansing preparation. The following chart gives an idea about various hair care products available in the market for both women and men.

Cosmetics for the hair

Women

Men

Shampoos  Depilatories  Dandruff

Hair oil  Shaving cream  Hair waving Preparation

2.4.1 Shampoo

Earlier soap cake was used for washing the hair. Today, a large population, both men and women use shampoo for washing their hair. Developments of synthetic detergents have revolutionised the shampoo market. A good shampoo should be able to

- Remove soil, sebum and residues of hair setting lotine.
- Produce foam of the degree
- Easy to remove shampoo by rinsing leaving the hair soft, lustrous and manageable.
• Impart a pleasant fragrance, and marking odour of wet hair\textsuperscript{12}.

One of the main functions of shampoo is to remove dirt on the hair. The dirt consists of Sebum secreted by the scalp, sweat residue, flakes of horny layer, residue from hair care cosmetics dust and other external matter settled on the hair. Removal of dirt on the hair is achieved by detergents. The mechanism of detergent action involves a number of physical phenomena, wetting, foaming, emulsification and peptization.

Originally the shampoos were made from soap or soap mixtures. But today, the shampoos are made from synthetic detergents. In addition to the ingredients, the kinds of shampoo are studied in a descriptive way.

2.4.1.1 Powder Shampoo

Earlier shampoos were prepared with soap powder and diluents like sodium carbonate, sodium bicarbonate, disodium phosphate or borax or their combination. Powder shampoo did not remain popular, partly because of trouble involved in using them and partly because these leave the hair in poor condition. Another type of powder shampoo is dry shampoo. These types of shampoos are used when it is inconvenient to use water. These are effective when the hair is greasy. When these shampoos are used, it should be ensured that all powder is removed by brushing. These are formulated with adsorbent materials like starch, talc, keiselguhr.

2.4.1.2 Liquid Shampoo

Liquid Shampoos are one of the popular types of shampoos. Clear liquid shampoos can be prepared with detergents having lower cloud pant. These can be made with detergents and alkanolamides. Concentrated clear liquid shampoo can be prepared with more soluble monoethanolamine lauryl sulphate.

These shampoos may be used by hairdressers by diluting at the time of use. A good mild shampoo can be formulated with detergents having good after-effects.

2.4.1.3 Lotion Shampoo

Lotion shampoos can be considered as an extension of clear liquid shampoos. These can be prepared by adding opacifier to clear liquid shampoos. Detergent manufacturers also make reformulated concentrated materials which can be diluted, coloured and perfumed. Ethylene glycol monostearate, ethylene glycol distearate can be used as opacifiers. These however, have tendency to redissolve in shampoo in hot weather. “The ingredients of lotion shampoos are solution of polyvinyl alcohol, methyl cellulos, alginate, Irish moss and magnesium stearate for opacifyine shampoos. It is recommended by De Navarre”\textsuperscript{13}. Shampoos of this class may contain other additives like egg, milk, cream. The egg is oldest and still popular ingredient. Either dried whole egg or dried egg yolk can be added. The egg powder should be converted into a paste with small quantity of water or glycerine and then should be diluted with some of the detergent solution before adding to the mix.

2.4.1.4 Cream Shampoo

Cream shampoos are usually demanded by professional hairdressers. These products can be packed in collapsible tubes. These products are also known as shampoo pastes. Generally, these are banded on Sodium alkyl sulphates which give products of firm consitency. Cetyl alcholoh can be added as builder. An alkanolamide such as coconut diethanolamide, lauric isopropanolamide can be added in concentration of one to two per cent as foam stabilizer. The major problem with this type of shampoos is that mass of crystals present in shampoo may dissolve in hot weather making the product runny and translucent. On cooling, recrystallization takes place and crystals formed may be

large appearing as lumps or fibrous mass. This type of shampoos is not very popular.

2.4.1.5 Anti-dandruff Shampoo

It is briefly called as dandruff shampoo. As a result of cell division in deeper layers of epidermis, some cells are being always pushed up towards the surface of the skin. The cells farthest from the dermis are keratinized and subsequently are shed off. This is true of scalp also. Such a condition causes dandruff. This may lead to skin diseases like acne and psoriasis.

2.4.1.6 Conditioning Shampoo

The two terms “Conditioning Shampoos” and “Shampoo Conditioners” are synonyms. Though they are similar in application, conditioning shampoos are intended primarily to cleanse and secondarily to improve manageability, feel and appearance of the hair. While the shampoo conditioners are designed to untangle wet hair and to improve manageability of both wet and dry hair, quaternary ammonium compounds have conditioning and bactericidal properties. Conditioning properties in quaternary ammonium compounds are imparted by the relatively large complex cation which is substantive to protein.

2.4.1.9 Shampoo Market

Several companies are now observing the growing shampoo market and existing players have to defend their territory by launching new products, reducing prices, and focusing on promotions. Companies are pushing rural penetration by focusing on the sales of sachets. Godrej Consumer Products recently made an aggressive entry into the market with the launch of its brand Godrej No.1, priced at 50 paise. The launch challenged the share of products of companies such as Cavin Kare. HUL is dominating the hair care market in
India\textsuperscript{14}. Due to advertisements and reasonable price, the sale of shampoo keeps on increasing. The following Table- 2.2 clearly exhibits the growth in sales of shampoos.

<table>
<thead>
<tr>
<th>Sl.No</th>
<th>Year</th>
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<tbody>
<tr>
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<td>2001-02</td>
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<tr>
<td>2</td>
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<td>12</td>
<td>2012-13</td>
<td>100.91</td>
</tr>
</tbody>
</table>

\textbf{Source:} Intecos – CIER

Trend analysis is used to predict the sales of shampoo in 2019-2020. The result is shown below: Sales Forecasting of shampoo for the Year 2019-2020

\[ Y = a + bx \]

\[ Y = 61.32 + (6.60 \times 13) \]

\[ = 147.12 \text{ billion} \]

The comparison between the actual and trend value of shampoo is pasteurised in

From the above Table and diagram, it is projected that, the trend value of shampoo for the year 2019-20 is ₹ 147.12 billions. It can be inferred that there is an intense future market for shampoo in India.

### 2.4.2 Shaving Cream

Removal of superfluous hair has been in practice from the ancient period. Shaving creams are widely used by men as a cosmetic for softening the beard for wet shaving and to overcome the irritation, minor damage to skin or cuts. Earlier to the agriculture revolution, it is assumed that men kept hair like animals. At very early stage the shaving must have been very rudimentary. Probably it was affected by cutting hair with some sharp metallic edge.

#### 2.4.2.1 Shaving Cream Market

Personal care products for men available in the Indian market are shaving cream, body talc, after-shave lotions etc. The men’s toiletries market is expanding in faster. Competition is growing among the lead players like Procter & Gamble, Colgate Palmolive, Hindustan Unilever, Baccarose Cosmetics and
Bond Street Perfumes, Park Avenue, Old Spice, and Denim. More and more players continue to enter the area causing quite a few splashes. India is now a global market place by the presence of the global producers. The following table shows the sale of the shaving cream in India.

Table 2.3
Growth of Shaving Cream Market

<table>
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<tr>
<th>Sl.No</th>
<th>Year</th>
<th>Sales In billion</th>
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<tr>
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<td>2012-13</td>
<td>6.52</td>
</tr>
</tbody>
</table>

Source: Intecos – CIER

Sales Forecasting of Shaving Cream for the Year 2019-20

\[ Y = a + bx \]

\[ Y = 4.54 + (0.27 \times 136) \]

\[ = 8.05 \]

The comparison between the actual and trend value of shaving cream is presented in the following diagram 2.2.
From the trend analysis, it is inferred that the sales volume of shaving cream is showing upward trend and the graphical representation is also evidence the same. Hence it is clear that the market for shaving cream is having bright future. The sales of shaving cream for the year 2019-20 would be ₹ 8.05 billions.

2.4.3 Hair Colorants

Hair colorants or hair dyes occupy a notable market today. They are used either to hide grey hair or to change the colour of the hair by individuals, either at home or at hairdressing saloon. A naturally occurring coloring agent containing lead sulphide was used by Egyptian women to give a black colour to the hair, eyebrows and eyelashes. Henna to obtain auburn tints, lysimachia for imparting blond tint, corisson to dye the hair black are notable examples. Over the time lot of changes occurred. Various types of dyes are available to impart intended colour and shades. In modern days, hair colorants may be classified into following categories.
2.4.3.1 Temporary Colorants

Temporary colorants impart colour to the hair for a short time. They are washed off during first shampoo. Present day temporary colorants are based on this principle and consist of a mixture of a suitable dye shift with an acid either in powder or in liquid forms.

2.4.3.2 Semi-permanent Colorants

Semi-permanent colorants give a stronger coloration to the hairs and can withstand six to eight subsequent shampoos although some of the colour is removed during each shampoo. These are made of dyes having smaller molecules which penetrate the hair easily.

2.4.3.3 Permanent Colorants

Permanent colorant can be used to intensify the natural colour or completely change the hair colour. They can also be successfully used to give a shade near to the natural colour of the hair.

2.4.3.4 Lighteners or Bleaches

Lighteners or bleaches alter the colour of the hair. These preparations can also be termed as decolouring preparations because they lighten or remove the natural colour. The bleaching effect is produced by the oxidation effect of the oxygen released by the action of alkali on the oxidizing agent hydrogen peroxide.

2.4.4 Hair Oil

Hair oil is widely used by the people for nourishment and care of hair. Variety of hair oils is available in the market. Some are pure oil like coconut oil, others normally contain some important ingredients dissolved in oil. Hair oil is an alternative non-spray gloss enhancer consisting principally of mineral oil or petroleum jelly depending on the physical form of the product. The product
being a liquid is generally packed in a narrow mouthed well closed bottle, made up of either glass or plastic. The label of hair oil should contain all the related information like brand name, manufacturer name, net content in milliliter, trade mark, batch number, storage directions and ingredients.\(^\text{15}\)

Hair oil completely adheres to the hair surface and holds the hair in position and makes them lustrous. The oily and waxy materials make the hairs tacky and surrounding of one hair adhere with other hair and keep it down by increased weight of adhering materials. Hair oil covers the hair by thin layer and neutralising the electrostatic charges generated on hair and makes them look ruffled. Substances used in hair oil to get tackiness are petrolatum, beeswax, animal fats, castor oil, coconut oil and high viscosity mineral oils. Incorporation of paraffin waxes, spamaceh, low viscosity mineral oil, isoproply myristate lower the tackiness. Hair oil gives glossy look to the hair. In preparation vegetable or animal oils preservatives and antioxidants are added. Colours can also be mixed optionally.

### 2.5 COSMETICS FOR TOOTH

Face is the index of mind, smile add value to the face. Smile costs nothing but gives much. A good smile is the result of good teeth. To have a good general health, healthy teeth and gums are important. So it is necessary to take care of healthy teeth and gums. To take care of tooth and maintain dental health and oral cavity various preparations are available.

#### 2.5.1 Tooth Pastes

Tooth paste is most popular, valuable and widely used preparations for cleansing the teeth. It has largest share of dental cleansing and care preparation. Though it is expensive than tooth powder but still it is most preferred. Tooth pastes are preferred by vast segment of the people in India, because it is

easy to take measured quantity and spread on the tooth brush, no spillage or wastage, attractive consistency and proper distribution in mouth.

The ingredients in tooth pastes are abrasives and polishing materials, detergents and foaming materials, humectants, binding agents, sweetening materials, flavour, preservatives, therapeutic agents and whitening agents.

### 2.5.2 Tooth Powder

Tooth powders are structurally the oldest, simplest and cheapest preparation of dentifrices. Their market share has been reduced due to the introduction of pastes, but still they have considerable share in total population. The main problem encountered with tooth powder, is floating of powder in air during manufacturing, formation of cake on storage and uneven distribution in mouth. Tooth powder contains an abrasive, a surfactant or detergents, a sweetening agent, flavour and colour as ingredients.

### 2.5.3 Solid and Liquid Dental Preparation

Solid and liquid dental preparations are not much popular, but still they exist in the market and have limited use for cleaning purpose. It is basically a tooth powder suspended in a soap base and converted to solid shapes. The abrasive materials vary from 50 per cent to 80 per cent and soap is 20 per cent to 50 per cent. It also contains flavour sweetness and colours.

### 2.5.4 Mouth Washes

Mouth washes are basically deodorants and antiseptics. They are used to remove the food debris which causes mouth odours on decomposition in mouth by oral bacteria. It also helps in cleansing by removing water soluble substances or loose debris from the surfaces or between the teeth or from oral cavity.
2.6 LEADING COSMETICS MANUFACTURING AND MARKETING COMPANIES IN INDIA

India is one of the fastest growing retail cosmetics market in the world. All the products have substitute products or alternative supplies. Hence the consumers are highly confused in making purchase decision. Advertisements facilitated them to do the same in simple and comparative way. Now-a-days multilevel marketing makes the global market into a single one. Endorsements are an immediate way to make the company selling process as much as five times more effective.\(^{16}\)

In today’s challenging economy and competitive business world, customers are becoming more and more knowledgeable about their purchase. Media is educating them and they explore around the best product, brand name, product quality, operation and service support. Therefore the task of business is all about creating a customer, satisfying a customer and retaining a customer. The customer retention depends on the ability of the organisation to encourage customers to complain and then recover when things go wrong. Measure the customer when things go wrong. Measuring customer lifetime value efficient complaint management system and service recovery strategies can be helpful in retaining customers.\(^{17}\)

Today with the increase in the number of channels and audience fragmentation, marketers are not able to catch their audience easily. They need to increase their promotional budgets to reach a larger audience but the results are not satisfactory. More and more brands are placing their faith in public relation to build credibility which is difficult to achieve through conventional advertising and publicity.\(^{18}\) Marketers of cosmetic products strive hard to find a


desired market in India. The leading cosmetics manufacturing and marketing companies and its products are discussed below:

2.6.1 Hindustan Unilever Limited (HUL)

Hindustan Unilever Limited shortly called HUL is India’s largest fast moving consumer goods company touching the lives of two out of three Indians with over 20 distinct categories in home and personal care products and goods and beverages. The company’s turnover is ₹ 17,923 crore for the financial year 2011-2012.

HUL is a subsidiary of Unilever, one of the world’s leading suppliers of fast moving consumer goods with strong root in more than 100 countries across the globe. The product line of HUL is home care, personal care, food and beverages. For this the company spent 16% for advertisement in their total expenditure. Their popular products are Hamam, Lifebuoy, Pears, Lux, Ponds, Lakme, Ayush, Kotex, Home Vim, Pureit, Surf excel, vanaspati, Red label, Brooke bond, Lipton, Kissan, Cadbury etc.,

HUL was recently rated among the top four companies globally in the list of global top companies for leaders. The company was ranked number one in the Asia-Pacific region and in India. More than 15,000 employees, including 1,400 managers are working in HUL. The mission of the company is to help people feel good, look good and get more out of life with HUL brand. Unilever products touch the lives of over 2 billion people every day through feeling great because they have got shiny hair and a brilliant smile, keeping their homes fresh and clean, or by enjoying a great cup of tea, satisfying meal or healthy snack.

19 www.hul.com
HUL offers cosmetics in various product lines such as hair care, skin care, tooth care products in India. In each product line it offers various brands. Hair Care products manufactured and marketed by the HUL is shampoo. Its renowned shampoo brands are Sunsilk, Clinic all clear, Dove, Clinic Plus and Organics shampoo. In skin care segment HUL products are toilet soap, face cream and face powder. The brands in toilet soap are Hamam, Dove, Pears, Lux, Lifebuoy, Salvon, Liril, Breeze, Rexona and Moti. In Fairness cream, the famous brands are Fair & Lovely, Ponds white beauty, Lakme and Vaseline. In face powder HUL offers only one brand named Ponds. In perfume category, Axe, Ponds, Rexona and Denim are the brands offered by HUL. In tooth care segment, HUL offers two toothpaste named Pepsodent and close-up.

2.6.1.1 Market Share of HUL

People are highly conscious about their skin. To keep their skin clean, shiny and attractive they use enormous products. Among these toilet soap is a fundamental product. HUL present massive deviation brand in soap for satisfying the different type of skin obsessed by women and men separately. The market share of HUL is increasing in a steady way. Now it holds more than 25 per cent of the market share. It indicates a good sign by HUL in India’s toilet soap market in future.

<table>
<thead>
<tr>
<th>Sl.No.</th>
<th>Year</th>
<th>Market Share (₹ in crores)</th>
<th>Market Share (in %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2004 – 2005</td>
<td>2380.92</td>
<td>19.05</td>
</tr>
<tr>
<td>2</td>
<td>2005 – 2006</td>
<td>2542.79</td>
<td>20.16</td>
</tr>
<tr>
<td>3</td>
<td>2006 – 2007</td>
<td>2808.69</td>
<td>22.12</td>
</tr>
<tr>
<td>4</td>
<td>2007 – 2008</td>
<td>3040.80</td>
<td>22.37</td>
</tr>
<tr>
<td>5</td>
<td>2008 – 2009</td>
<td>3441.52</td>
<td>24.33</td>
</tr>
<tr>
<td>6</td>
<td>2009 – 2010</td>
<td>3727.28</td>
<td>25.32</td>
</tr>
</tbody>
</table>

Source: Industry: Market size and share. Centre for monitoring Indian economy.
From the Table-2.4 it is clearly understood that the market share of HUL soaps which are offered in different brand name like Hamam, Dove, Peers, Lux, Lifebuoy, Salvon, Liril, Breeze, Exona kept on escalating. It shows that the market share of HUL soap is favourable for attaining growth value in near future.

2.6.1.2 Lakme Salon, Lakme Studio and Lakme Beauty Salons

The growing disposable income and changing lifestyles in rural and urban India has led to a greater awareness about personal grooming, health and wellness. HUL company franchised Lakme Beauty salons and the same were transferred to Lakme Lever Private Limited. It has the objective of achieving excellence in execution by a specialised and dedicated team, passionate about beauty service.

HUL recognises people as its most important asset and is committed to provide a safe and healthy work environment for those working on and visiting its operations. Management at all levels will be responsible and will be held accountable for the occupational safety and health performance of the company. HUL is committed to making continuous improvement in the management of its environmental impact and to the longer term of goal of developing a sustainable business. HUL meets every day needs of millions of Indians right from the morning brushing, cup of tea, taking bath, to brushing at bedtime. Company pays key attention in strengthening its relationship with their customers. The most recent product of HUL for youth is antiperspirant. In order to promote HUL antiperspirant brand sure, HUL in association with candid marketing conducted a college contact program called Friends of Sure (FOS). The initiative used was word-of-mouth to publicise the product. In India antiperspirants are an untapped audience initiative focused on educating young Indian women on hygiene through the use of antiperspirants. The backbone of bagging 700

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millions Indians as customers to HUL company spent huge amount for its promotional activities particularly advertisement. The following table will clear exhibit the same.

<table>
<thead>
<tr>
<th>Sl.No.</th>
<th>Particulars</th>
<th>Expenditure in Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Materials</td>
<td>58 %</td>
</tr>
<tr>
<td>2</td>
<td>Labour</td>
<td>6 %</td>
</tr>
<tr>
<td>3</td>
<td>Advertising</td>
<td>16 %</td>
</tr>
<tr>
<td>4</td>
<td>Utilities, Rent, Repairs</td>
<td>6 %</td>
</tr>
<tr>
<td>5</td>
<td>Carriage &amp; Freight</td>
<td>6 %</td>
</tr>
<tr>
<td>6</td>
<td>Depreciation</td>
<td>1 %</td>
</tr>
<tr>
<td>7</td>
<td>Miscellaneous expenditure</td>
<td>7 %</td>
</tr>
<tr>
<td></td>
<td><strong>TOTAL</strong></td>
<td><strong>100 %</strong></td>
</tr>
</tbody>
</table>

Source: HUL Web site

Table 2.5 evidently proves the expenditure prototype of every 100 rupees of HUL. From this it is clear that 58 per cent of total expenditure is for material and 16 per cent second major expenditure is for its advertisement. Hence it is apparent that HUL gives much importance for advertisement to sustain and increase its market share.

2.6.2 Emami

Emami Limited is one of the major beauty, health and personal care fast moving consumer goods companies in India with its brand presence globally. Leveraged by celebrity endorsements, Emami believes in building categories by meeting unfulfilled consumer needs. Emami Limited has over 25 brands under its portfolio. The focus is on providing the consumers with innovative products which are capable of meeting their multiple needs and add value by enhancing the quality of life Emami touches peoples’ life spanning across various income groups in both rural and urban India through its power brands and innovations.
Emami succeed because of its ayurvedic product, innovation, dynamic and focused leadership, strong supply-chain management, unwavering commitment to customers, stakeholders etc. The key products of Emami for Indian consumers are Boroplus, Navratna, Fast Relief and Fair and Handsome. Synthesis of innovation, cutting-edge technology, product efficiency and intelligent pricing are the some of the modus operandi of making the Emami brand as people’s choice.

A fair complexion has always been associated with success and popularity. Both men and women alike desire of fairness, it is believed to be the key to a successful life. In olden days the materials home made therapies which make the person so fair and keep a long silky attractive hair all prepared by themselves by adopting cumbersome and extremely long procedures. Due to paucity of time people prefer to use the product offered by companies. Emami offered 30 products to its customers derived from select and effective ayurvedic, natural and herbal ingredients. Different types of health care and toiletries based ayurvedic items were produced in Himani factory by Emami Co. Boroplus Antiseptic Cream was its first flagship produced in 1984. Now it is the largest selling antiseptic cream not only in India but also in Russia, Ukraine and Nepal.

Emami Limited has entered two new personal care categories with the launch of Emami Pure Skin Glycerine soap and Emami Vasocare petroleum jelly. The company decided to spend ₹ 80 crore to build a market for these products. The product line of Emami is clearly shown under:

<table>
<thead>
<tr>
<th>Product Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hair care</td>
</tr>
</tbody>
</table>

In skin care, Emami concentrates only in fairness creams. But it is the first and foremost company which offered fairness cream for men. The leading
fairness cream brands of Emami are Fair & Ageless, Emami, aturally, Fair & Teen, Fair & Handsome and Himani Sona Chandi healthy & fair. Navratna oil and Navratna oil lite are the two major cosmetics as hair care products.

In 2005, Emami created a marketing history in India by launching Fair and Handsome, the first fairness cream for men. Emami acquired a major stake in Zandeil Pharmaceutical Works Ltd. Within three decades, Emami Ltd. has grown into a huge ₹ 1,000 crore Emami Ltd. under the flagship company of the ₹ 3000 crore Emami group.

Today, Emami Ltd. is led by Mr.R.S.Agarwal ad Mr.R.S.Geoenka. Their family members acting as second generation promoter directors and the qualified and dedicated set of professionals run the day-to-day operations of the company.

### 2.6.3 India Tobacco Company Limited (ITC)

ITC was incorporated on August 24, 1910 under the name Imperial Tobacco Company of India Limited. The name of the Company was changed as India Tobacco Company Limited in 1970 and then to I.T.C. Limited in 1974. The Company's multi-business portfolio is Cigarettes, Tobacco, Hotels, Information Technology, Packaging, Paperboards & Specialty Papers, Agribusiness, Foods, Lifestyle Retailing, Stationery and Cosmetics. In July 2005 ITC introduced Essenza Di Wills, an exclusive range of fine fragrances bath and body care products for men and women.

In 1990, ITC acquired Tribeni Tissues Limited, a Specialty paper manufacturing company and a major supplier of tissue paper to the cigarette industry. In 2002, ITC entered the confectionery and staples segments with the launch of the brands mint-o and Candyman confectionery and Aashirvaad atta (wheat flour). In 2003 ITC entered in the biscuit segment in the name of Sunfeast biscuits. ITC's entered the fast growing branded snacks category with Bingo in
In eight years, the Foods business has grown to a significant size with over 200 differentiated products under six distinctive brands, with an enviable distribution reach, a rapidly growing market share and a solid market standing.

In line with ITC's aspiration to be India's premier FMCG recognized for its world-class quality and enduring consumer trust, ITC forayed into the Personal Care business in July 2005. In the short period since its entry, ITC has already launched an array of brands, each of which offers a unique and superior value proposition to discerning consumers.

ITC expands its personal care products portfolio by offering 'Fiama Di Wills', a premium range of shampoos, shower gels and soaps in September, October and December 2007 respectively to the Indian consumers. Vivel Active Fair is a result of continuous engagement with consumers, understanding their needs and designing an offer and delivering benefits which truly make a difference. Additionally, Vivel Active Fair vitamins, minerals and moisturizers provide total care to the skin. The cream is suitable for all skin types. The creams are available in 50g tubes for ₹ 70, 25g tubes for ₹ 38 and 9g sachets at an attractive introductory price of http://en.wikipedia.org/wiki/Indian_rupee ₹ 5 only.

The list of cosmetics products offered by ITC are bathing soap, Skin cream and shampoos. In bathing soap segment ITC offers eight famous brands. They are Vivel Young Glow , Vivel Satin Soft, Vivel Sandal Sparkle , Vivel Ayurveda Essence, Vivel Silk Spring, Vivel Milk Cream and Glycerine bathing bar, Vivel Deo Spirit Soap and Vivel Healthy Glow soap. The two brands in skin cream segments are Vivel Active Fair and Vivel Shine & Glow. In shampoos category three brands offered by ITC are Vivel Soft & Fresh, Vivel Volume & Bounce and Ultrapro anti-dandruff shampoo.
2.6.4 Dabur India Limited

Dabur India Limited is the fourth largest fast moving consumer goods Company in India with interests in health care, personal care and food products. Dabur India Limited was launched by Dr. Buman and he made health care products in small level at Calcutta in the year 1884. Dabur entered the specialized area of nature based Ayurvedic medicines for standarised drugs because Ayurveda is a holistic Indian system of medicine that uses a constitutional model. In 2009 Dabur Red toothpaste became the Dabur’s ninth billion rupee brand. Dabur Red toothpaste crossed the billion rupee turnover market with in five years of its launch.

The cosmetic products of Dabur Public Ltd., are Hair Care Products, Oral Care Products and Skin Care Products. The leading brands in hair care products are Dabur Amla Hair Oil, Dabur Vatika Hair Oil, Dabur Special Hair Oil, Dabur Coconut oil and Vatika Henna Cream Conditioning Shampoo. In oral care segment, the famous brands are Dabur Red Tooth Powder and Dabur Herbal Tooth Paste. Dabur Vatika Saffron Glow Soap with Sandal and Dabur Gulabari Jal (Gulab Jal) are the two brands in skin care segment.

2.6.5 Procter & Gamble India Limited

Procter & Gamble India Limited is one of the India's best-selling healthcare and personal care Company. The company’s leading products are Pantene pro V, Head & Shoulders, Rejoice, Ariel, Tide, Gillette, Vicks, Whisper and Oral B. P&G’s Beauty Business is one of the world’s largest beauty companies. The P&G beauty business sold more than 50 different beauty brands including Pantene, Olay, SK-II, Max Factor, Cover Girl, Joy, Hugo Boss, Herbal Essences and Clairol Nice at international level. In India, P&G’s beauty care business comprises of -
Pantene - the world’s largest selling shampoo
Head & Shoulders - the world’s No. 1 Anti-dandruff shampoo
Rejoice – Asia’s No. 1 Shampoo.
Olay

Procter & Gamble is committed in making every day in the lives of its consumers better through the superior quality of its products and services. P&G targeting upper middle class Indians.22

2.6.6 Godrej Company Limited

Godrej Company Ltd. is one of the most accomplished and diversified business houses in India. It was started in 1897. Godrej’s success has been driven by the company’s commitment to delivering innovation and excellence. Godrej management understands that the company’s greatest asset is the trust and faith that consumers have reposed in it and recognizes that the company must continue to earn this trust. A recent estimate suggested that 350 million people across India use Godrej products because of its reliability.23

The Company is popularly known for its soaps, toiletries, hair care, etc. not only in India, but also in the countries across the globe. To offer the best to the consumers, Godrej Consumers Products employs the Total Quality Management system. Major Godrej Consumers Products include Godrej Liquid & Powder Hair Dyes, Godrej Kesh Kala Oil, Godrej Renew Coloursoft Liquid Hair Colours and Nupur based Hair Dyes in hair care segment, Fairglow, Cinthol, Godrej No. 1, Cinthol Deo in toilet soap, Godrej Fairglow in fairness cream and Godrej Shaving Cream in shaving cream segments.

22 www.p&g.com
2.6.7 Colgate- Palmolive Company

Colgate-Palmolive Company was incorporated in 1923, as a consumer products company over 200 countries and territories. Colgate’s Oral Care products include Colgate Total and Colgate Max Fresh toothpastes, Colgate 360 manual toothbrushes and Colgate Plax mouth rinses. The Company’s Personal Care products include Palmolive and Softsoap brand shower gels, Palmolive, Irish Spring and Protex bar soaps and Speed Stick and Lady Speed Stick deodorants and antiperspirants. Presently it is doing business under the trademarks Colgate, Palmolive, Kolynos, Sorriso, Elmex, Mennen, Protex, Softsoap, Irish Spring, Ajax, Axion, Soupline, Suavitel, Hill's Science Diet and Hill's Prescription Diet. Colgate's lines include dental care, household cleaning, personal care and pet food products. Of Colgate's product lines are oral care, household cleaning, personal care and pet food products, dental care products are the most lucrative.

2.7 CONCLUSION

The present chapter provides a sequence of information about a brief introduction about the standard for cosmetics, history and development of cosmetics, regulation related to cosmetics and cosmetics industry and the various items of cosmetics which are taken for the current research work in an elaborate manner and summary of the leading companies profile. Trend analysis is used to predict the future sales of shampoo and shaving cream. The trend value of shampoo for the year 2019-20 is ₹ 147.12 billions and it is expected that there is an intense future market for shampoo in India. The market share of HUL soap is favourable for attaining growth value in near future and HUL gives much importance for advertisement to sustain and increase the share both in sales as well as market share. A wide variety of brands produced and marketed by leading cosmetics manufacturing companies are also presented in a nut shell.