

**Annexure I****List of largest 100 cosmetics companies and their home-region Sales**

<i>Sr. No.</i>	<i>Company</i>	<i>Home country</i>	<i>Home region</i>	<i>Sales in million US \$ (2006)</i>
1	L'Oreal Group	France	Europe	15,500
2	P&G	USA	America	13,000
3	Unilever PLC	GB	Europe	8,070
4	Shiseido CO.LTD	Japan	Asia	5,270
5	Estee Lauder Cosmetics Inc.	USA	America	5,100
6	Avon Products Inc.	USA	America	4,490
7	Beiersdorf AG	Germany	Europe	3,790
8	Johnson & Johnson	USA	America	3,750
9	Alberto Culver Co. USA America	USA	America	2,750
10	Kao Corp.	Japan	Asia	2,750
11	Limited Brands	USA	America	2,600
12	LVMH Louis Vuitton	France	Europe	2,470
13	Chanel	France	Europe	2,240
14	Colgate Palmolive	USA	America	2,200
15	Henkel KGAA	Germany	Europe	2,140
16	The Boots Company PLC	GB	Europe	2,030
17	Mary Kay Inc.	USA	America	1,800
18	Alticor Inc.	USA	America	1,800
19	Yves Rocher	France	Europe	1,720
20	Coty Inc.	USA	America	1,700
21	Kanebo	Japan	Asia	1,680
22	Kose Corp.	Japan	Asia	1,440
23	Revlon Inc.	USA	America	1,300
24	Amorepacific Corp.	Korea	Asia	1,090
25	Sara Lee Corp.	USA	America	1,080
26	Group Clarins	France	Europe	1,000
27	Puig Beauty and Fashion	Spain	Europe	990
28	Pola Cosmetics Inc.	Japan	Asia	881
29	Gillette Co.	USA	America	864
30	Elizabeth Arden Inc.	USA	America	814
31	Oriflame Cosmetics	Sweden	Europe	738
32	Gucci Group (PPR)	Netherlands	Europe	696
33	Group Pierre Fabre	France	Europe	687
34	The Body Shop GB	GB	Europe	623
35	Nippon Menard Cosmetics	Japan	Asia	570
36	Euroitalia Group	Italy	Europe	504
37	LG Household and Health	Korea	Asia	495
38	Nu Skin Enterprises Inc.	US	America	476
39	Colomer Beauty and Prof. Spain	Spain	Europe	450
40	Clayton Dubilier and Rice	US	America	400
41	Sisley	France	Europe	373
42	Noevir Co. LTD	Japan	Asia	355
43	Markwins International	US	America	325
44	DEL Laboratories	US	America	310
45	Tigi	US	America	250
46	IWP	Ireland	Europe	206

47	Liz Claiborne	US	America	200
48	Inter Parfums	GB	Europe	186
49	Kelemata Group	France	Europe	181
50	L'occitane	France	Europe	175
51	Mirato SPA	Italy	Europe	175
52	Guaber Group	Italy	Europe	170
53	Ales Group	France	Europe	170
54	Johnson Publishing	US	America	170
55	Eugene Perma	France	Europe	168
56	Coreana	Korea	Asia	159
57	Diana De Shilva	Italy	Europe	158
58	Bulgari Parfums	Swiss	Europe	155
59	Combie INC.	US	America	154
60	Micys (pupa)	Italy	Europe	149
61	Maxim Marken	Germany	Europe	147
62	O Boticario	Brazil	America	147
63	Schering-Plough	US	America	146
64	Von Berg Cosmetics	US	America	137
65	Laboratoires Sarbec	France	Europe	130
66	Kalina	Russia	Europe	126
67	Deborah Group	Italy	Europe	125
68	Maurer + Wirtz	Germany	Europe	122
69	Playtex Products	US	America	119
70	Parfums de Coeur	US	America	118
71	Diamond Products	US	America	113
72	Lush LTD.	UK	Europe	112
73	Versace Profumi	Italy	Europe	110
74	Sony Culture Ent.	Japan	Asia	105
75	Pagliari Profumi	Italy	Europe	102
76	Weleda AG	Swiss	Europe	102
77	Doctor Babor	Germany	Europe	101
78	MD Beauty	US	America	100
79	Financiere Richemont SA	Swiss	Europe	95
80	Collistar	Italy	Europe	93
81	Tupperware	US	America	91
82	Marbert	Germany	Europe	84
83	Parlux Fragrance	US	America	81
84	Jacques Bogart	France	Europe	80
85	Tanning Research	US	America	79
86	Artdeco	Germany	Europe	78
87	Weruska & Joel SRL	Italy	Europe	76
88	Fribad Germany	Germany	Europe	74
89	Hankook	Korea	Asia	72
90	Guinot Group	France	Europe	71
91	Murad	US	America	67
92	Mana Products	US	America	65
93	Alcina Kosmetik	Germany	Europe	63
94	Hermes	France	Europe	61
95	Riviera Concepts	Canada	America	59
96	Parfume Parlour	France	Europe	56
97	Russkaya Kosmetika	Russia	Europe	55
98	Charmzone	Korea	Asia	54
99	Crabtree and Evelyn	US	America	52
100	Perricone MD	US	America	52

**Annexure II**

Responses from the Consumers, Dermatologists, and Cosmetic companies were collected through questionnaire. An outline of all the three questionnaires is mentioned below.

**Questionnaire for Consumers**

**Consumer perception toward cosmeceutical products in India.**

Gender:	Age:	Occupation:
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1. Do you use Cosmeceutical/Derma-cosmetic products?

- Yes  No

2. For which of the following purposes you use skin care products

- Cleansing  Smoothing  
 Moisturizing  Reducing fine lines and wrinkles  
 Whitening  Reducing blemishes  
 Oil controlling  Other functions (Please Specify) \_\_\_\_\_

3. Do you use cosmeceutical product prescribed by dermatologists?

- Yes  No  If Yes Please Specify brand \_\_\_\_\_

4. How much do you spend on skincare products per month?

- 25- 50 Rs  100-300 Rs  
 50-100 Rs  300-500 Rs  
 More than 500 (Please specify the amount) \_\_\_\_\_

5. Do you look out for natural cosmeceuticals?

- Yes  No

6. Do you read the ingredients in your cosmeceuticals?

- Yes  No  Sometimes

7. Are you aware of animal tested cosmeceuticals?

- Yes  No

8. Which of the following factors encourage you to use Cosmetics/Cosmeceuticals?

- Appearance/Packing     Newsgroup on internet     Word of mouth (friends)
- Advertising     Quality     Advice of beautician
- Safety     Products used by celebrities     Price
- Loyalty to the brand     New technology of the product

9. I primarily buy cosmetics from

- Department Stores     Drug Stores
- Online Stores     Specialty Stores

10. What are reasons for selecting places of purchase for cosmeceuticals?

- Convenience in access     Store reputation (product reliability)
- Good atmosphere & service     Advice from one's close associates
- Variety of products available     Low price and effective display of product

11. To what extent do you agree with the claims made by the manufacturers of Cosmetics/Cosmeceuticals?

- Strongly agree     Agree     Disagree     Strongly Disagree     Neutral

12. What is/are the major impact(s) of cosmeceutical advertising to you?

- Rising consciousness about your look     Influence your idea of a perfect beauty
- Want to have cosmetic surgery     Make more purchase on cosmetics

13. The product quality is better if the price of the product is high.

- Strongly agree     Agree     Disagree     Strongly Disagree     Neutral

14. Have you ever had a reaction to cosmeceutical products?

- Yes     No     If yes please specify adverse reaction \_\_\_\_\_

15. I am satisfied with the cosmetic/cosmeceutical products available in the market.

- Strongly agree     Agree     Disagree     Strongly Disagree     Neutral

## Questionnaire for Dermatologists

### Perception mapping of Dermatologists toward Cosmeceuticals in India

Gender:	Age:	Qualification:	Experience:
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1. Doctor are you aware of “Cosmeceutical products”?

Yes                       No

2. If yes, what is the source of information for Cosmeceuticals?

Newspaper     TV commercial     Magazine     Conference     Medical Representative  
Any other (Please Specify) \_\_\_\_\_

3. Is the concept of Cosmeceuticals in India popularized?

Yes                       No                       Can't say

4. Should dermatologists dispense Cosmeceutical products in India?

Strongly agree     Agree     Neutral     Disagree     Strongly Disagree

5. Doctor do you recommend/prescribe Cosmeceutical products to your patients?

Frequently     Hardly ever     Never

6. Which are most prescribed categories for Cosmeceutical products?

Antiacne     Aging/photo damage     Hair loss     Fungal infections     Cleansing  
 Moisturising     Sunscreen     A/D shampoos     Baby care     Any other

7. The Cosmeceutical products available in the market are backed by science.

Strongly agree     Agree     Neutral     Disagree     Strongly Disagree

8. Doctor according to you, Cosmeceutical products should be available as,

Prescription only products     OTC product     FMCG products

9. Cosmeceutical products are equally regulated as the drugs by respective regulatory authorities.

Strongly agree     Agree     Neutral     Disagree     Strongly Disagree

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10. Whether there should be new category for these products other than drug and cosmetic in India?

Strongly agree  Agree  Neutral  Disagree  Strongly Disagree

11. Cosmeceutical products may replace cosmetics in near future.

Strongly agree  Agree  Neutral  Disagree  Strongly Disagree

12. Which types of Cosmeceuticals would become popular over the next five years?

Sunscreens  Anti-aging  Antidandruff Shampoos  Whitening creams

Skin repair creams  Fillers  Anti acne

13. What makes you to prescribe a particular Cosmeceutical brand?

Company image  Brand price  Brand experience  Brand safety

**Questionnaire for Cosmetic and Pharmaceutical companies**

**The Industry view on Cosmeceuticals**

Company Name:	Address:
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1. Do you manufacture or do marketing of cosmeceutical products in India?

- Yes
- No

2. Please specify the average annual sales turnover of the company.

Rs\_\_\_\_\_ /Year

3. Which of the following cosmeceutical products are manufactured by your company?

- Sunscreens
- Moisturizers
- Bleaching agents
- Anti-aging products
- Conditioning agents
- Hair growth stimulants
- Antidandruff shampoos

4. Please specify the regulatory guidelines company follow for ensuring safety of Cosmeceuticals?

- As followed for OTC products
- As followed for Drugs
- As followed for Cosmetics

5. Which evaluation parameters company carries out for identifying efficacy of Cosmeceuticals?

- As specified for OTC products
- As specified for Drugs
- As specified for Cosmetics

6. Which guidelines company follows for labeling the cosmeceutical products?

- As specified for OTC products
- As specified for Drugs
- As specified for Cosmetics

7. Please specify the factors that would encourage consumers to use Cosmeceutical products

- Appearance/Packing
- Newsgroup on internet
- Word of mouth (friends)
- Advertising
- Quality
- Safety
- Price

8. Which types of Cosmeceuticals would become popular over the next five years?

- Sunscreens
- Anti aging
- Shampoos
- Wrinkle reducers
- Skin firming agents
- Skin repair creams
- Bleaching agents

9. There is a bright future for the cosmeceutical products in India and we would like to manufacture more and more cosmeceutical products.

- Strongly agree
- Agree
- Neutral
- Disagree
- Strongly Disagree



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10. It is difficult to manufacture cosmeceutical products when compared to cosmetic products and it would be even more difficult once the guidelines are established by the regulatory authorities.

- Strongly agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

11. What may be the reasons for not establishing regulatory guidelines for cosmeceuticals among Indian regulatory authorities?

- May not feel the need
- Financial Incapability
- Procedural difficulties
- Lack of infrastructure and manpower

12. What factors will impede the growth of Indian cosmeceutical Industry?

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