

F E B R U A R Y

2014

India Cosmeceuticals Industry Outlook to 2017

- Rising Demand for Skin care Products
to Propel Growth
-

TABLE OF CONTENTS

1. Asia Pacific Cosmeceuticals Industry Introduction
 - 1.1. Asia Pacific Cosmeceuticals Market Size by Revenue, 2007-2012
 - 1.2. Asia Pacific Cosmeceuticals Market Segmentation, 2007-2012
 - 1.2.1. By Geography, 2007-2012
 - 1.3. Ingredients Used in Cosmeceutical Products
2. India Cosmeceuticals Market Introduction
 - 2.1. India Cosmeceuticals Market Size by Revenue, 2007-2012
3. India Cosmeceuticals Market Segmentation, 2007-2012
 - 3.1. By Skin care, Hair care and Other Products, 2007-2012
 - 3.2. By Distribution Channels, 2012
4. Market Share of Major Players in India Cosmeceuticals Industry, 2012
 - 4.1. Product and Pricing Portfolio of Cosmeceutical Products in India by Key Brands
 - 4.2. Competitive Landscape of Major Players in Cosmeceuticals Market in India
5. India Cosmeceuticals Market Future Outlook and Projections, 2013-2017
 - 5.1. By Revenue, 2013-2017
 - 5.2. By Skin care, Hair care and other Products, 2013-2017
6. Macroeconomic Indicators of India Cosmeceuticals Market: Current and Projections, 2007-2017
 - 6.1. Urban Population in India, 2007-2017
 - 6.2. Per Capita Total Expenditure on Health in India, 2007-2017
 - 6.3. Population by Age-group of 15-64 Years in India, 2007-2017
7. Appendix
 - 7.1. Market Definitions
 - 7.2. Abbreviations
 - 7.3. Research Methodology

Data Collection Methods

Approach

Variables (Dependent And Independent)

Multi Factor Based Sensitivity Model

Final Conclusion

7.4. Disclaimer

SAMPLE

LIST OF FIGURES

Figure 1: Types of Cosmeceuticals

Figure 2: Asia-Pacific Cosmeceuticals Market Size on the Basis of Revenue in USD Million, 2007-2012

Figure 3: India Cosmeceuticals Market Size on the Basis of Revenue in USD Million, 2007-2012

Figure 4: Usage of Cosmeceutical Products in India by Gender, 2012

Figure 5: India Cosmeceuticals Market Segmentation by Skin care, Hair care and other products on the Basis of Contribution in Percentage (%), 2007-2012

Figure 6: India Cosmeceutical Market Sub-segmentation of Skin care by Anti-aging, Sensitive skin and Moisture and others on the Basis of Contribution in Percentage (%), 2007-2012

Figure 7: India Cosmeceuticals Market Segmentation by Distribution Channels on the Basis of Contribution in Percentage (%), 2012

Figure 8: Market Share of Leading Players in India Cosmeceuticals Market on the Basis of Contribution in Percentage (%), 2012

Figure 9: India Cosmeceuticals Market Future Projections on the Basis of Revenue in USD Million, 2013-2017

Figure 10: India Cosmeceuticals Future Projections by Skin care, Hair care and other Products on the Basis of Contribution in Percentage (%), 2013-2017

Figure 11: Urban Population in India in Million, 2007-2017

Figure 12: Per Capita Total Expenditure on Health in India in US Dollars, 2007-2017

Figure 13: Population in India within the Age-group of 15-64 years in Million, 2007-2017

LIST OF TABLES

Table 1: Difference between Cosmetics and Cosmeceuticals

Table 2: Asia-Pacific Cosmeceuticals Market Segmentation by Geography on the Basis of Contribution in Percentage (%), 2007-2012

Table 3: Asia-Pacific Cosmeceuticals Market Segmentation by Geography on the Basis of Revenue in USD Million, 2007-2012

Table 4: India Cosmeceuticals Market Segmentation by Skin care, Hair care and other products on the Basis of Revenue in USD Million, 2007-2012

Table 5: India Cosmeceutical Market Sub-segmentation of Skin care by Anti-aging, Sensitive skin and Moisture and others on the Basis of Revenue in USD Million, 2007-2012

Table 6: India Cosmeceuticals Market Segmentation by Distribution Channels on the Basis of Revenue in USD Million, 2012

Table 7: Product and Price Positioning and Key Performance Indicators of Anti-aging Brands in India

Table 8: Product and Price Positioning of Anti-Acne and Pimple Removal Brands in India

Table 9: Product and Price Positioning of Moisturizer Brands in India

Table 10: Product and Price Positioning of Sun care Brands in India

Table 11: Product and Price Positioning of Hair Care Brands in India

Table 12: Price Analysis of Skin care Cosmeceutical Products by Brands in India

Table 13: Competitive Landscape of Major Players in Cosmeceuticals Market in India

Table 14: India Cosmeceuticals Future Projections by Skin care, Hair care and other Products on the Basis of Revenue in USD Million, 2013-2017

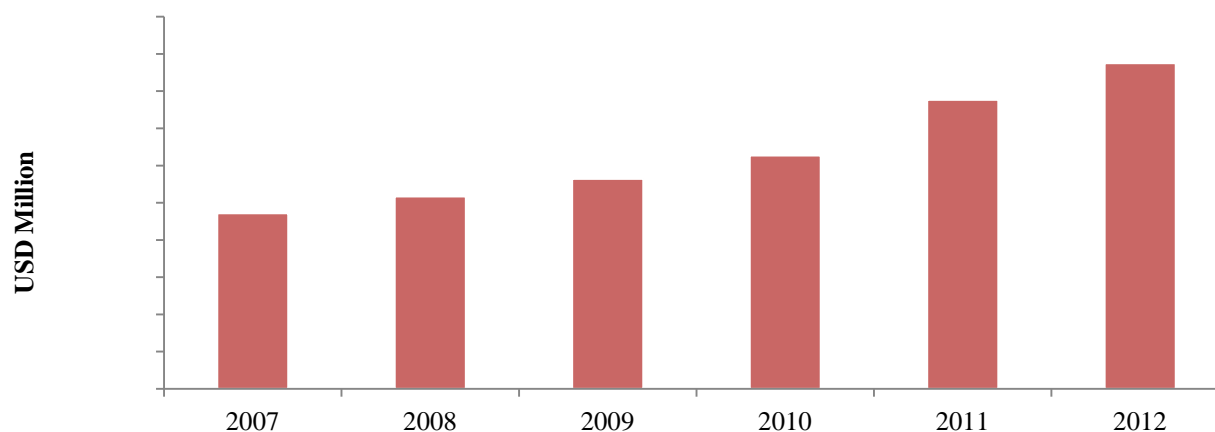
Table 15: Correlation Matrix of Japan Cosmeceuticals Market

Table 16: Regression Coefficient Output

ASIA PACIFIC COSMECEUTICALS MARKET SIZE BY REVENUE, 2007-2012

The cosmeceuticals industry in Asia Pacific region has showcased an impressive sales growth in the past six years from 2007-2012. The market has grown at a stupendous CAGR of 13.2% during these years. Medicated cosmetics market has majorly been driven by expanding purchasing power and rising health consciousness of the Asian population. Moreover, the companies are readily spending on promotional activities to amplify awareness about these products among the people. The desire of each individual to retain a youthful appearance has stipulated the demand for cosmeceuticals which can neither be categorized as cosmetics or pharmaceuticals, thus strengthening the market for cosmeceuticals in Asia Pacific region. The industry has not been managed by stringent government regulations which have ultimately impeded the entry of new players into the market. Presently, cosmeceuticals are available as OTC products and are easily reachable to the users who are relatively ignorant and dispossessed of relevant information about pharmaceutical ingredients.

Figure: Asia-Pacific Cosmeceuticals Market Size on the Basis of Revenue in USD Million, 2007-2012



ASIA PACIFIC COSMECEUTICALS MARKET SEGMENTATION, 2007-2012

BY GEOGRAPHY, 2007-2012

...The utility of cosmeceuticals has considerably risen in recent years. This radically inclined the techniques of clinician in improving the treatment of skin, hair and other conditions. The value growth of cosmeceutical products over the years has been impelled by changing consumer perception. In the cosmeceuticals market in Asia-Pacific region, Japan contributed the major share of 40.0% in the total market revenue in 2012. The revenue generated from cosmeceuticals in Japan was valued at USD ~ million during the year...

Table: Asia-Pacific Cosmeceuticals Market Segmentation by Geography on the Basis of Contribution in Percentage (%), 2007-2012

Countries	2007	2008	2009	2010	2011	2012
Japan						
China						
India						
Vietnam						
Thailand						
South Korea						
Others						
Total						

Source: Primary Research and Industry Sources, Ken Research

Note: Others include Indonesia, Malaysia, Singapore, Australia and others

INDIA COSMECEUTICALS MARKET SIZE BY REVENUE, 2007-2012

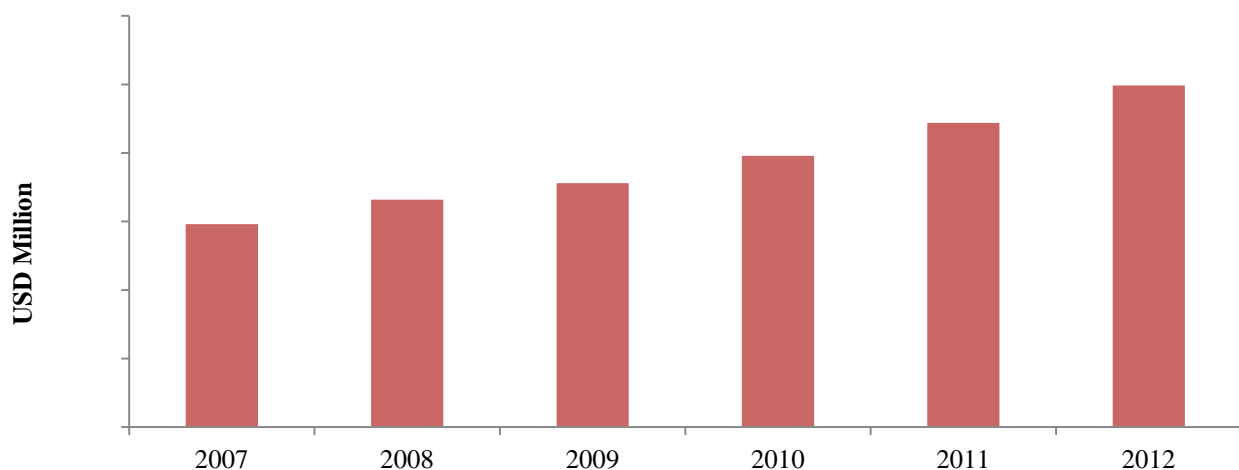
...The Indian market has more to expand in terms of cosmeceuticals. In the Indian culture, for ages there have been regular innovations to have a healthy and beautiful skin. Thus, with the innovations and the new products launched along with higher demand for medicated cosmetic

“ International cosmeceutical companies in India constitute 71% of the market ”

products, this industry has showcased substantial growth from 2007-2012. Incline in the emergence of several companies manufacturing cosmeceutical products in India, preference to use

clinically tested products as against products that do not have any safety measures were few of the major growth drivers for the cosmeceuticals industry in the country. It has been noticed that, international cosmeceutical companies in India constitute 71% of the market....

Figure: India Cosmeceuticals Market Size on the Basis of Revenue in USD Million, 2007-2012



INDIA COSMECEUTICALS MARKET SEGMENTATION, 2007-2012

BY SKIN CARE, HAIR CARE AND OTHER PRODUCTS, 2007-2012

The contribution of skin care product segment has increased in the past few years due to the inflating demand for fairness products amongst women and the men category especially in the urban areas in India. Previously the women population was believed to be sole consumer of the fairness and other such creams but the introduction of the concept of metro-sexual men and the preferences amongst the male population to look fairer and smarter has actually aided the growth of cosmeceutical industry in India.

Skin care segment recorded the revenue of USD ~ million in 2012. Skin care cosmeceuticals in India have been segmented on the basis of purpose such as anti-aging, sensitive skin and moisture, sun care and others. In 2007, the share of anti-aging was 34.3% to the total cosmeceuticals industry in India which escalated to ~% registering revenue of USD ~ million in 2012. The moisture and sensitive skin segment showcased year on year growth as the contribution expanded to ~% in 2012.

Figure: India Cosmeceuticals Market Segmentation by Skin care, Hair care and other products on the Basis of Contribution in Percentage (%), 2007-2012

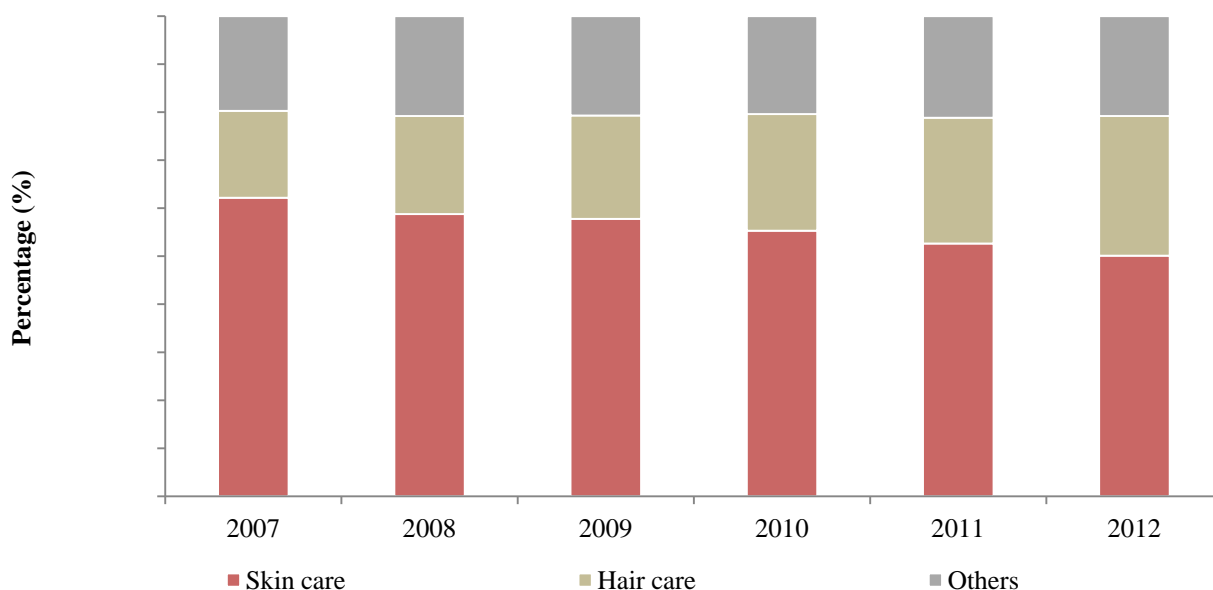


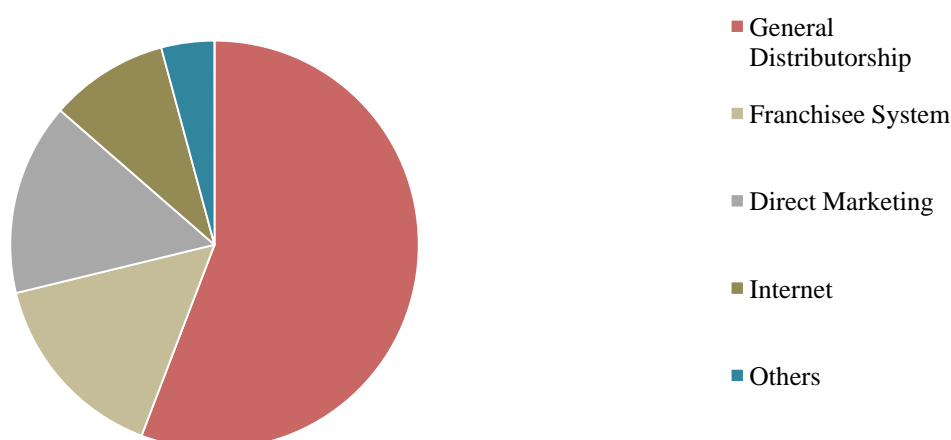
Table: India Cosmeceuticals Market Segmentation by Skin care, Hair care and other products on the Basis of Revenue in USD Million, 2007-2012

Cosmeceutical Products	2007	2008	2009	2010	2011	2012
By Skin Care Products						
By Hair Care Products						
By Others						
Total						

BY DISTRIBUTION CHANNELS, 2012

The key distribution channels prevalent in Indian dermaceuticals industry are general distributorship, franchisee, direct marketing, internet and others. The majority of cosmeceutical products in India have been distributed through general distributorship. The share of general distributorship in the cosmeceuticals market in India was 55.8% and generated the revenue of USD ~ million in 2012. Followed by, Franchisee system with a share of ~% and direct marketing marked a share of 15.2% in the same year.

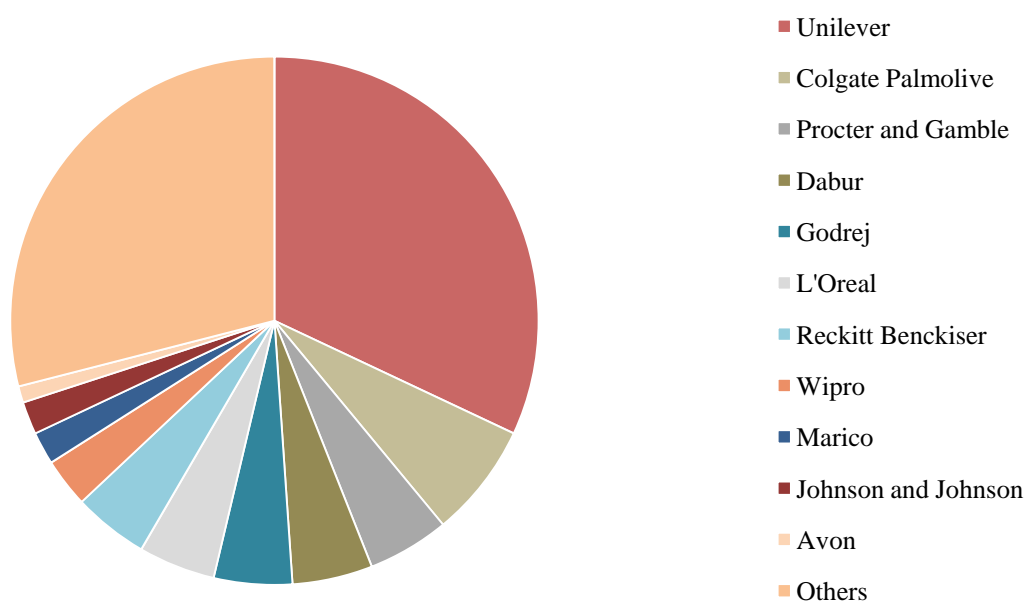
Figure: India Cosmeceuticals Market Segmentation by Distribution Channels on the Basis of Contribution in Percentage (%), 2012



MARKET SHARE OF MAJOR PLAYERS IN INDIA COSMECEUTICALS INDUSTRY, 2012

The cosmeceutical industry in India comprises of various international companies and few national and local conglomerates. Hindustan Unilever is amongst one of the major medicated cosmetic players in India with a substantial share of ~% recorded in 2012. The company has maintained its leading position in the Indian cosmeceuticals industry by emphasizing on the development of variety of products at an affordable price. The company's strong research and development team always focused on innovations in product and services. Colgate Palmolive captured second position in the country's dermaceuticals market with a share of ~% in 2012.

Figure: Market Share of Leading Players in India Cosmeceuticals Market on the Basis of Contribution in Percentage (%), 2012



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