

Original Article

Analysis of hair care products with reference to antidandruff shampoo market in Moradabad region

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ABSTRACT

In the past few years, Indian beauty has occupied a significant place in the fashion world. Both men and women have started giving importance to personal beauty grooming. As such Indian cosmetic industry, especially the hair care market has risen to productive market. In this paper the researcher tried to focus on the hair care products especially top shampoo companies, major brands. The market share of hair care segment in India is continuously increasing day by day. The shampoo market is dominated by HUL and P&G. The top shampoo brands are Sunsilk, Clinic Plus, Pantene and H&S which are placed in the ‘Stars’ cell of BCG matrix of shampoo brands of India.

1. INTRODUCTION

Washing the hair and scalp has become a near universal practice. Shampoos are probably the most widely used hair products today; based on synthetic detergents they are relatively insensitive to water hardness, thus allowing for efficient rinsing since there are no scum residues. In the early days a shampoo could be defined as an effective cleansing agent for hair and scalp, but today the shampoo must do much more. It must leave the hair easy to comb, lustrous and controllable whilst being convenient and easy to use.

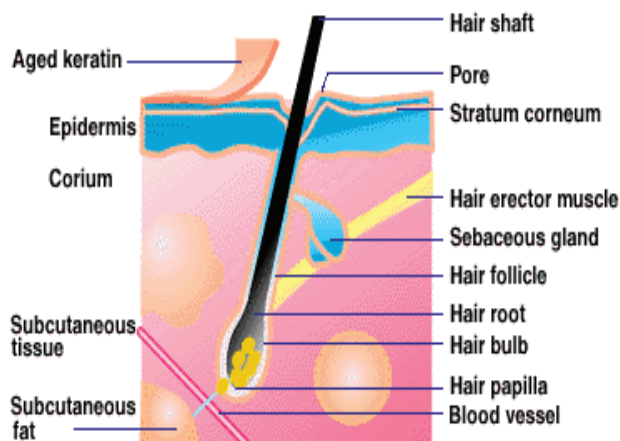


Fig. 1. Hair structure

Hair is composed primarily of proteins (88%), these proteins are of a hard fibrous type known as keratin. A hair is made up of the hair shaft & the hair root, which contains pigment cells which are important for color of the hair. Hair is structured in three basic layers : (1) Cuticle – it is the outermost layer of the hair and protects the hair. Cuticle layer is important for the shine and elasticity of the hair. (2) Cortex – It is the thickest layer that is made up of fibrous bundles of protein molecules. It contains melanin pigment which imparts color of the hair. (3) Medulla- It is in the centre of the hair and provide stiffness to the hair [1-3].

In essence, shampoos are simply detergents. They are a different type of cleaning media than ordinary laundry or hand detergents because of their application to different types of hair. Shampoos are used to remove excess oil, dirt and skin debris from the hair known as sebum. Dandruff is the shedding of dead skin cells from the scalp. Dandruff is a common scalp disorder affecting almost half of the population. It often causes itching. It has been well established that keratinocytes play a key role in the expression and generation of immunological reactions during dandruff formation. The signs and symptoms of dandruff are an itchy scalp and flakiness. Dandruff can have several causes, including dry skin, seborrhoeic dermatitis [4-5].

Chief Chemical ingredients used as anti-dandruff agents are Ketoconazole, Ciclopirox, Climbazole, Sodium Sulphate, Zinc

pyrithione (ZPTO) and Octopirox. In addition, natural products are also used as anti dandruff agent such as Neem, Fenugreek (methi), Baking Soda, Aspirin, Tea Tree Oil, Aloe and Henna [6-7].

2. EXPERIMENTAL

The goal of market analysis was to determine the attractiveness of market and to understand the its opportunity and threats as they relate the strength & weaknesses of the company [3]. The present work is a market survey for the choice of anti-dandruff shampoos done in Moradabad region. For this data regarding India top leading anti-dandruff shampoos, choice of anti-dandruff shampoos among residents in Moradabad, choice of

active ingredients used as anti-dandruff agent, price of various leading anti-dandruff shampoos and anti-dandruff shampoos manufacturing companies was collected and dually analyzed.

3. RESULTS AND DISCUSSION

Data was collected regarding India top leading anti-dandruff shampoos, choice of anti-dandruff shampoos among residents in Moradabad, choice of active ingredients used as anti-dandruff agent, price of various leading anti-dandruff shampoos and anti-dandruff shampoos manufacturing companies. The data obtained was dually analyzed and interpreted. The results of this market analysis are mentioned as under.

Table 1. India’s top leading Anti-dandruff shampoos

S. No.	Brand name	Chief Ingredient	Mfg by	Package size	MRP
1	Head &shoulders	ZPTO, sodium lauryl sulphate	P&G	375 ml	305/-
2	Dove anti dandruff shampoo	sodium lauryl sulphate, cocamido propyl betaine, ZPTO	Hindustan unilever Ltd.	375 ml	283/-
3	Clinic all clear	sodium lauryl sulphate, ZPTO, TEA-dodecyl benzene	Hindustan unilever Ltd.	375 ml	290/-
4	Himalaya anti dandruff shampoo	Ammonium lauryl sulphate, cocamido propyl betaine,	Himalaya drug company	400 ml	220/-
5	Ketomac	Ketoconazole (2%w/v)	Torque pharmaceutical	110 ml	171/-
6	Scalpe	Ketoconazole , ZPTO	Glenmark pharmaceutical	60 ml	213.50/-
7	Nuforce	Ketoconazole ,ZPTO	LIFE STAR PHARMA	50 ml	108.35/-
8	Pantene	Sodium lauryl sulphate, ZPTO	P&G	375 ml	300/-
9	Vatika	Lemon & henna	Dabur	200 ml	132/-

Statistical Analysis

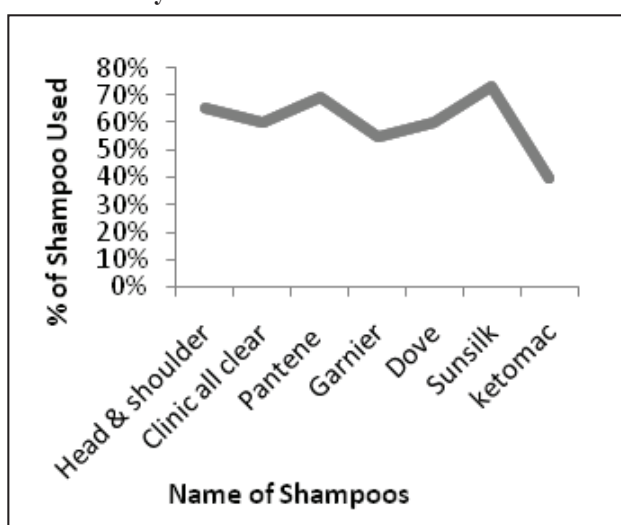


Fig. 2. Comparison of Different Shampoos Used

In market, many antidandruff shampoos are available but according to customer preference, Sunsilk, Pantene and Head & Shoulder are top leading shampoos. Sunsilk has better anti dandruff property than other shampoo present in the market (Fig 2).

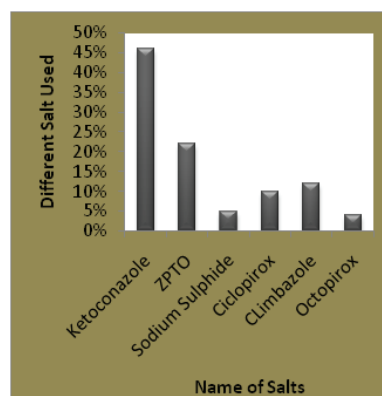


Fig. 3. Comparison of Different Salts Used

Result indicates that Ketoconazole (46%) is the major active ingredient of maximum shampoos (Fig 3). Since it has greater and better activity against dandruff so India's leading companies prefer ketoconazole in manufacturing of anti dandruff shampoo. Other ingredients such as ZPTO (22%), Climbazole (12%), Ciclopirox(10%), Sodium Sulphate (5%) and Octapirox (4%) are also used in anti dandruff shampoo.

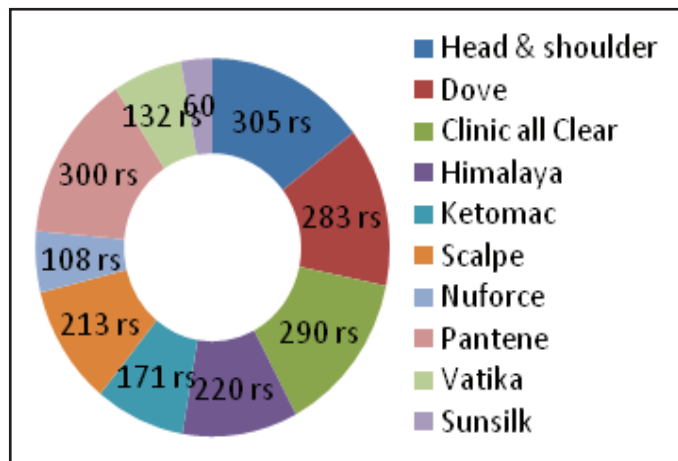


Fig. 4. Comparison of anti- dandruff shampoos according to the price

The price of the shampoos available in the India shampoo market varies with the size of the bottle (Fig. 4). Besides this the shampoos coming under the category of expensive are Head & Shoulder 305/-, Pantene 300/-, Vatika 290/- and Dove 283/-. The shampoos which are comes in the acceptable price are Sunsilk 60/-, Himalaya 220/-& Clinic All Clear 213/-.

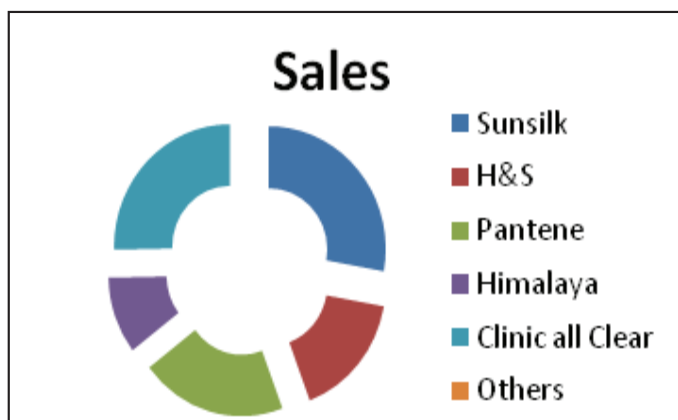


Fig. 5. Top shampoo brands in India

The major selling brands are Sunsilk and Head & Shoulders which are dominating the market with 22% and 20% of market share of shampoo segment followed by Pantene and Clinic All Clear with 16% and 13% respectively (Fig 5). Himalaya is dominating the herbal shampoos with 8% of the total market share of shampoo segment.

The top three companies in shampoo market are Hindustan Unilever Ltd (HUL), Procter and Gamble and Himalaya (Fig. 6). From the pie chart, it is seen that Hindustan Unilever Ltd. is dominating the market with 46% of market share followed by Procter and Gamble and Himalaya with 24% and 11% of market share respectively. The other major players in the market are Torque , L'oreal and CavinKare with 6%, 3% and 2% of market share [9].

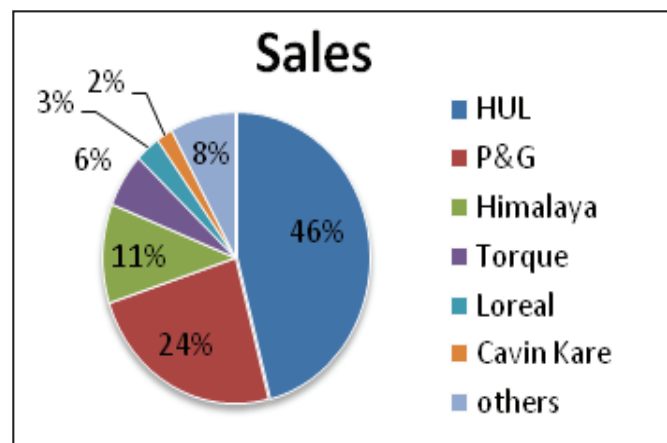


Fig. 6. Market share of shampoo companies in India

4. CONCLUSION

In India the market share of hair care segment contributes a considerable amount i.e. 9% of FMCG sector. This is continuously increasing from 6230.8 crores of rupees to 8417.79 crores of rupees in the commercial years of 2010-11 to 2013-14. The shampoo market is dominated by Hindustan Unilever Ltd. with a market share of 46% followed by Procter and Gamble with 24%. The top shampoo brands are Sunsilk, Clinic All Clear, Pantene, Head & Shoulders, Ketomac & Loreal etc. According to active ingredients used in top brands of anti dandruff shampoo in India, the most preferable ingredient which are used to treat dandruff effectively are Ketoconazole (46%) and ZPTO (22%). These ingredients seem to be the leading active chemical constituents among the other ingredients so these are mostly used by leading manufacturing companies of antidandruff shampoo. The other ingredient with anti dandruff activity are Ciclopirox (10%), Climbazole (12%), Sodium sulphate (5%) and Octopirox (4%). Some companies are using Ketoconazole and ZPTO in combination in their anti-dandruff formulations.

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