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TO WHOM IT MAY CONCERN

Re: Spontaneous recommendation of dermocosmetic brands* by dermatologists

Founded in 1990, APLUSA (with US affiliate APLUSA Bell Falla) is one of the world's leading independent market research companies dedicated to healthcare. APLUSA is certified ISO 20252.

This letter confirms that the information reported to L'Oréal on the dermocosmetic market, from the International Dermatologist Barometer survey, involving dermatologists in 34 countries representing more than 80% of the worldwide GDP, for the concerned period January – May 2023, **shows that:**

In Europe, the dermatologists spontaneously recommend the following top dermocosmetic brands:

Sample: 2314 dermatologists

	Spontaneous dermocosmetic brands recommended **
1	La Roche-Posay
2	Avene
3	Vichy
4	Bioderma
5	CeraVe
6	Eucerin
7	Uriage
8	ISDIN
9	Ducray
10	A-Derma
11	Cetaphil
12	Cantabria Labs
13	SVR
14	Dermasence



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15	Galderma
16	Topicrem
17	BioNike
18	Lipobase
19	SkinCeuticals
20	La-Cri
21	Dermoskin
22	Noreva
23	Epsilon Health
24	Le Santi
25	Pierre Fabre
26	Pharmaceris
27	Louis Widmer
28	ZO Skin Health
29	Emolium
30	Unifarco
31	Sesderma
32	Iwostin
33	Frezyderm
34	Martiderm
35	ACM
36	Biogena
37	Dermedic
38	ROC/ Neostrata
39	Dexeryl
40	Filorga
41	Solante
42	Aveeno
43	Eubos
44	Neutrogena
45	Leti
46	Codexial
47	Cerko
48	Froika
49	Cieffe Derma
50	AllSkin Med
51	Hans Karrer
52	Sebamed
53	Boderm
54	Canova
55	Rev
56	SYNCHROLINE/General topics
57	ISIS Pharma
58	ACO
59	Ivatherm

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60	Pelpharma
61	Relife
62	Permamed
63	Dermadolin
64	Evdermia
65	Decubal
66	Locobase
67	Merz
68	Institut Esthederm
69	Helenvita
70	Canoderm (Miniderm)
71	Dermol
72	Aestheticco
73	Cetraben
74	MEY
75	Drs Leenarts
76	Target
77	Version
78	Vencil
79	Ultrasun
80	Hydrovit
81	AT14
82	Noviderm
83	Zeitschild
84	Medinfar
85	D'Aveia
86	Dermoteca
87	Propyless
88	Propyderm
89	Edol

* *“Dermocosmetics” are topical products (excluding drugs) used on skin, scalp and hair recommended by healthcare professionals, they can be used in monotherapy or as adjunctive treatment to any drug or procedures (fighting skin issues such as, dry skin, atopic skin, acne, seborrheic dermatitis, pigmentation...). They are also used to protect, preserve or maintain the health and beauty of the skin, scalp and hair.*

** *Data Consolidation of: Question 2a: Which is the dermocosmetic brand that you recommend or prescribe the most? And Question 2b: What are all the other dermocosmetic brands that you recommend or prescribe?*

FOR UK only, it was also mentioned “in all questions stating recommending/prescribing, we highlight that in countries like the UK recommendation is only allowed for some non-prescribed products, therefore we ask the respondents to indicate only their recommendation in the specified questions.”



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The study targeted dermatologists with relevant certification according to each country where the survey was conducted. Eligibility criteria were the necessity of dermatologists to be aware of at least one dermocosmetic brand and they must have been consulted by patients for at least one of the defined indication or pathology that were part of the survey. To achieve national representativeness in each country, hard quotas were put in place regarding the practice settings and the national regions.

The survey was a quantitative survey, with a questionnaire of 30 minutes or ad'hoc, depending on countries specifications. The survey could be performed online only, online with a phone recruitment of participants, by WATI, CAWI, PAPI or F2F methodology according to countries. Questionnaire was translated in the local language(s) by experienced translators and reviewed by a native speaker.

Brands were coded to ease data entry and analysis. The survey methodology was adapted to each country to ensure feasibility and data quality. A quality check question was inserted within the questionnaire to avoid any kind of automatic answers from the respondents.

For most of the countries (32 countries), APLUSA has entirely (with the help of its partners) carried out the study (set-up, fieldwork, delivery). For other countries (referred as 3rd party countries), the study was carried out by local L'Oréal Dermatological Beauty affiliates and their associated vendors. APLUSA, for the scope of this project, is not responsible for these results, still a "compatibility" analysis was made by L'Oréal Dermatological Beauty in order to consolidate all results and support defined claims. Results of these countries were shared by L'Oréal in a predefined format required by APLUSA for consolidation purposes.

APLUSA shall not be responsible for the use that will be made of this study by L'Oréal.

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Appendix 1: Detailed parameters of the study

Country	Language	Duration W5	Interview type	Universe	Data source	Sample	Sample rate	Error margin
Global				125884		4911	4%	+/- 1%
EUROPE-LARGE SIZE COUNTRIES				31023		1292	4%	+/- 3%
France	French	30 min	Online	3 979	APLUSA / official source	100	3%	+/- 10%
Italy	Italian	30 min	Online	4 542	APLUSA / official source	300	7%	+/- 5%
Spain	Spanish	30 min	Online	2 550	APLUSA / official source	150	6%	+/- 8%
UK*	English	30 min	Online	626	APLUSA / official source	73	12%	+/- 12%
Germany	German	30 min	Online	5 840	APLUSA / official source	200	3%	+/- 7%
Austria	German	30 min	Online	815	APLUSA / official source	49	6%	+/- 14%
Switzerland	French / Italian / German	30 min	Online	766	APLUSA / official source	50	7%	+/- 13%
Portugal	Portuguese	30 min	Online	405	APLUSA / official source	70	17%	+/- 12%
Russia	Russian	60 min	F2F/CATI	11 500	3rd party	300	3%	+/- 5%
EUROPE-MIDDLE SIZE COUNTRIES				8921		1022	11%	+/- 3%
Sweden	Swedish	30 min	Online	480	APLUSA / official source	36	7%	+/- 16%
Belgium	Dutch / French	30 min	Online	748	APLUSA / official source	59	8%	+/- 12%
Netherlands	Dutch	30 min	Online	663	APLUSA / official source	56	8%	+/- 13%
Greece	Greek	30 min	Online	1 200	APLUSA / official source	150	13%	+/- 7%
Poland	Polish	30 min	Online	2 566	APLUSA / official source	150	6%	+/- 7%
Romania	Romanian	30 min	Online	957	APLUSA / official source	100	10%	+/- 9%
Turkey	Turkish	30 min	CAPI/CAWI	2 307	3rd party	471	20%	+/- 4%
NORTH AMERICA				17623		460	3%	+/- 4%
US	English	30 min	Online	17 000	APLUSA / official source	400	2%	+/- 5%
Canada	English / French	30 min ADHOC	Online	623	APLUSA / official source	60	10%	+/- 12%
LATIN AMERICA				24432		750	3%	+/- 4%
Brazil	Brazilian Portuguese	30 min ADHOC	Online	18 600	APLUSA / official source	250	1%	+/- 6%
Mexico	Spanish	30 min	Online	2 000	APLUSA / official source	200	10%	+/- 7%
Argentina	Spanish	30 min	Online	2 840	APLUSA / official source	180	6%	+/- 7%
Colombia	Spanish	30 min	Online	992	APLUSA / official source	120	12%	+/- 4%
NORTH ASIA				33005		622	2%	+/- 4%
China	Chinese	30 min ADHOC	Online	21 000	APLUSA / official source	322	2%	+/- 5%
Taiwan	Taiwanese (traditional Chinese)	30 min	Online	1 120	APLUSA / official source	100	9%	+/- 9%



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Korea	Korean	30 min	Online	2 200	APLUSA / official source	100	5%	+/- 9%
Japan	Japanese	30 min	Online	8 685	APLUSA / official source	100	1%	+/- 9%
SAPMENA				10880		765	7%	+/- 4%
Australia	English	30 min	Online	580	APLUSA / official source	45	7%	+/- 15%
Thailand	Thai	30 min	F2F	585	APLUSA / official source	130	22%	+/- 8%
Vietnam	Vietnamese	30 min	Online	2 000	APLUSA / official source	100	5%	+/- 9%
Indonesia	Indonesian	30 min	Online	2 100	APLUSA / official source	100	5%	+/- 9%
Saudi Arabia	Arabic	30 min	F2F	1 350	APLUSA / official source	100	5%	+/- 9%
Egypt	Arabic	30 min	F2F	3 185	APLUSA / official source	85	3%	+/- 10%
UAE	Arabic	30 min	F2F	507	APLUSA / official source	85	17%	+/- 10%
Morocco	French	30 min	F2F	573	APLUSA / official source	120	21%	+/- 8%

**UK: consultants only are included (total interviewed: 85 derms, 73 consultants)*

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Appendix 2: Country level detailed results

FRANCE

Sample: 100 dermatologists

	Spontaneous dermocosmetic brands recommended	% of total spontaneous dermocosmetic brands recommended*
1	La Roche-Posay	67%
2	Avene	67%
3	Bioderma	51%
4	A-Derma	33%
5	Uriage	31%
6	SVR	30%
7	Ducray	28%
8	Eucerin	19%
9	Noreva	13%
10	Vichy	8%
11	ACM	7%
12	Codexial	7%
13	CeraVe	6%
14	Pierre Fabre	6%
15	Galderma	5%
16	ISDIN	5%

** Data Consolidation of: Question 2a: Which is the dermocosmetic brand that you recommend or prescribe the most? And Question 2b: What are all the other dermocosmetic brands that you recommend or prescribe?*

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ITALY

Sample: 300 dermatologists

	Spontaneous dermocosmetic brands recommended	% of total spontaneous dermocosmetic brands recommended*
1	La Roche-Posay	68%
2	Avene	49%
3	BioNike	35%
4	Vichy	31%
5	ISDIN	29%
6	Cantabria Labs	26%
7	Unifarco	15%
8	CeraVe	15%
9	Epsilon Health	15%
10	Eucerin	14%
11	Bioderma	12%
12	Biogena	10%
13	Uriage	10%
14	SkinCeuticals	7%
15	Ducray	6%
16	Pierre Fabre	6%
17	SVR	5%
18	Cieffe Derma	5%
19	Canova	5%
20	Rev	5%

* Data Consolidation of: Question 2a: Which is the dermocosmetic brand that you recommend or prescribe the most? And Question 2b: What are all the other dermocosmetic brands that you recommend or prescribe?

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SPAIN

Sample: 150 dermatologists

	Spontaneous dermocosmetic brands recommended	% of total spontaneous dermocosmetic brands recommended*
1	La Roche-Posay	81%
2	ISDIN	71%
3	Avene	69%
4	Cantabria Labs	67%
5	Bioderma	28%
6	ZO Skin Health	18%
7	Uriage	17%
8	Martiderm	17%
9	Eucerin	16%
10	A-Derma	15%
11	Vichy	15%
12	Ducray	13%
13	Sesderma	11%
14	Epsilon Health	9%
15	Leti	9%
16	AllSkin Med	9%
17	CeraVe	7%
18	SkinCeuticals	7%
19	Galderma	7%
20	Pierre Fabre	5%

** Data Consolidation of: Question 2a: Which is the dermocosmetic brand that you recommend or prescribe the most? And Question 2b: What are all the other dermocosmetic brands that you recommend or prescribe?*



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UNITED KINGDOM

Sample: 73 dermatologists

	Spontaneous dermocosmetic brands recommended	% of total spontaneous dermocosmetic brands recommended*
1	La Roche Posay	58%
2	CeraVe	40%
3	Eucerin	34%
4	Aveeno	22%
5	Avene	21%
6	Vichy	19%
7	Cetaphil	15%
8	Bioderma	12%
9	Cetraben	10%
10	Dermol	10%
11	Neutrogena	7%
12	Galderma	5%

** Data Consolidation of: Question 2a: Which is the dermocosmetic brand that you recommend or prescribe the most? And Question 2b: What are all the other dermocosmetic brands that you recommend or prescribe?*

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GERMANY

Sample: 200 dermatologists

	Spontaneous dermocosmetic brands recommended	% of total spontaneous dermocosmetic brands recommended*
1	La Roche-Posay	68%
2	Eucerin	50%
3	Avene	47%
4	Dermasence	34%
5	Vichy	24%
6	Cetaphil	22%
7	ISDIN	12%
8	Galderma	11%
9	CeraVe	8%
10	SkinCeuticals	5%
11	Ducray	5%

** Data Consolidation of: Question 2a: Which is the dermocosmetic brand that you recommend or prescribe the most? And Question 2b: What are all the other dermocosmetic brands that you recommend or prescribe?*

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AUSTRIA

Sample: 49 dermatologists

	Spontaneous dermocosmetic brands recommended	% of total spontaneous dermocosmetic brands recommended*
1	La Roche-Posay	86%
2	Avene	53%
3	Eucerin	49%
4	Galderma	29%
5	Dermasence	29%
6	CeraVe	24%
7	Pelpharma	20%
8	Louis Widmer	18%
9	Vichy	16%
10	SkinCeuticals	10%
11	Cetaphil	10%
12	Ducray	8%
13	Noreva	6%

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SWITZERLAND

Sample: 50 dermatologists

	Spontaneous dermocosmetic brands recommended	% of total spontaneous dermocosmetic brands recommended*
1	La Roche-Posay	84%
2	Avene	72%
3	Eucerin	50%
4	Louis Widmer	42%
5	Vichy	32%
6	Galderma	32%
7	Permamed	20%
8	SkinCeuticals	12%
9	A-Derma	12%
10	Bioderma	10%
11	CeraVe	8%
12	Ultrasun	8%
13	Uriage	8%
14	Hans Karrer	6%
15	Aestheticco	6%
16	Merz	6%

** Data Consolidation of: Question 2a: Which is the dermocosmetic brand that you recommend or prescribe the most? And Question 2b: What are all the other dermocosmetic brands that you recommend or prescribe?*

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PORTUGAL

Sample: 70 dermatologists

	Spontaneous dermocosmetic brands recommended	% of total spontaneous dermocosmetic brands recommended*
1	La Roche-Posay	70%
2	Bioderma	63%
3	Uriage	54%
4	Avene	46%
5	Cantabria Labs	46%
6	ISDIN	44%
7	SVR	34%
8	CeraVe	23%
9	Filorga	23%
10	Vichy	20%
11	SkinCeuticals	20%
12	A-Derma	17%
13	Ducray	16%
14	Martiderm	14%
15	Sesderma	14%
16	Eucerin	13%
17	Institut Esthederm	7%
18	Medinfar	7%
19	D'Aveia	7%
20	Dermoteca	7%
21	Aveeno	6%
22	Galderma	6%
23	Noreva	6%
24	Pierre Fabre	6%
25	Edol	6%

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RUSSIA

Sample: 300 dermatologists

	Spontaneous dermocosmetic brands recommended	% of total spontaneous dermocosmetic brands recommended*
1	La Roche-Posay	100%
2	Vichy	81%
3	Bioderma	39%
4	CeraVe	36%
5	Avene	33%
6	Uriage	23%
7	Topicrem	15%
8	Lipobase	13%
9	Eucerin	13%
10	Ducray	12%
11	La-Cri	10%
12	Le Santi	9%
13	Cetaphil	6%
14	A-Derma	5%

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SWEDEN

Sample: 36 dermatologists

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1	La Roche-Posay	72%
2	Eucerin	50%
3	ACO	42%
4	Decubal	28%
5	Canoderm (Miniderm)	22%
6	ROC/ Neostrata	19%
7	Avene	17%
8	Vichy	14%
9	CeraVe	11%
10	Locobase	8%
11	Noviderm	8%
12	Bioderma	6%
13	Cetaphil	6%
14	Galderma	6%
15	Propyless	6%
16	Propyderm	6%

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BELGIUM

Sample: 59 dermatologists

	Spontaneous dermocosmetic brands recommended	% of total spontaneous dermocosmetic brands recommended*
1	La Roche-Posay	86%
2	Avene	78%
3	Eucerin	56%
4	Uriage	53%
5	Bioderma	44%
6	ISDIN	34%
7	A-Derma	27%
8	Louis Widmer	27%
9	Ducray	25%
10	SVR	25%
11	Vichy	24%
12	CeraVe	15%
13	ACM	10%
14	ROC/ Neostrata	8%
15	SkinCeuticals	7%
16	Zeitschild	5%

** Data Consolidation of: Question 2a: Which is the dermocosmetic brand that you recommend or prescribe the most? And Question 2b: What are all the other dermocosmetic brands that you recommend or prescribe?*

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NETHERLANDS

Sample: 56 dermatologists

	Spontaneous dermocosmetic brands recommended	% of total spontaneous dermocosmetic brands recommended*
1	La Roche-Posay	89%
2	Eucerin	75%
3	Vichy	30%
4	Avene	23%
5	Louis Widmer	18%
6	CeraVe	16%
7	Dermasence	16%
8	Drs Leenarts	13%
9	Galderma	9%
10	AT14	7%
11	Cetaphil	7%
12	SkinCeuticals	5%

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GREECE

Sample: 150 dermatologists

	Spontaneous dermocosmetic brands recommended	% of total spontaneous dermocosmetic brands recommended*
1	La Roche-Posay	66%
2	Avene	53%
3	Frezyderm	47%
4	A-Derma	21%
5	Froika	21%
6	Vichy	19%
7	Boderm	17%
8	Sebamed	15%
9	Epsilon Health	13%
10	Ducray	11%
11	Eubos	11%
12	Evdermia	11%
13	CeraVe	10%
14	Helenvita	9%
15	Uriage	7%
16	Relife	7%
17	MEY	7%
18	Bioderma	7%
19	Target	6%
20	Version	6%
21	SYNCHROLINE/General topics	5%
22	Vencil	5%
23	Hydrovit	5%

* Data Consolidation of: Question 2a: Which is the dermocosmetic brand that you recommend or prescribe the most? And Question 2b: What are all the other dermocosmetic brands that you recommend or prescribe?

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POLAND

Sample: 150 dermatologists

	Spontaneous dermocosmetic brands recommended	% of total spontaneous dermocosmetic brands recommended*
1	La Roche-Posay	79%
2	Avene	63%
3	Bioderma	53%
4	Cetaphil	38%
5	Pharmaceris	33%
6	CeraVe	31%
7	Vichy	27%
8	Iwostin	25%
9	A-Derma	19%
10	Emolium	17%
11	Ducray	17%
12	Dermedic	17%
13	Galderma	11%
14	Cerko	11%
15	SVR	10%
16	Eucerin	7%
17	Pierre Fabre	6%
18	Dexeryl	5%

** Data Consolidation of: Question 2a: Which is the dermocosmetic brand that you recommend or prescribe the most? And Question 2b: What are all the other dermocosmetic brands that you recommend or prescribe?*

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ROMANIA

Sample: 100 dermatologists

	Spontaneous dermocosmetic brands recommended	% of total spontaneous dermocosmetic brands recommended*
1	Bioderma	67%
2	Avene	53%
3	La Roche-Posay	32%
4	Uriage	25%
5	Vichy	22%
6	A-Derma	22%
7	Ivatherm	20%
8	CeraVe	19%
9	Cetaphil	18%
10	Ducray	11%
11	ISIS Pharma	6%
12	ACM	5%

** Data Consolidation of: Question 2a: Which is the dermocosmetic brand that you recommend or prescribe the most? And Question 2b: What are all the other dermocosmetic brands that you recommend or prescribe?*

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TURKEY

Sample: 471 dermatologists

	Spontaneous dermocosmetic brands recommended	% of total spontaneous dermocosmetic brands recommended*
1	La Roche-Posay	93%
2	Bioderma	86%
3	Vichy	58%
4	CeraVe	55%
5	Dermoskin	51%
6	Avene	39%
7	Solante	16%
8	Topicrem	7%
9	Dermadolin	6%

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