BEAUTY ROUND
THE CLOCK

IN-COSMETICS BANGKOK
NOVEMBER 2016
THE WORLD'S LEADING MARKET INTELLIGENCE AGENCY

Our expert analysis of the highest quality data and market research will help you grow your business
How we do it

EXPERT TEAM

50+ years industry experience

+ CREDIBLE DATA

Innovation
Consumers
Markets
Trends

LEADING INDUSTRY FORECASTING

WHAT’S NEXT
Where we do it

Mintel Global Coverage

- Mintel Office
- Shopper Network
- Primary New Products Data and Shopper Network
- Primary Consumer Research, Primary New Products Data and Shopper Network
CONTINUOUS BEAUTY TUNE-UPS

Consumers are being encouraged to continually monitor and manage their health and fitness. Beauty companies are moving in this direction too, offering round-the-clock beauty routines.
HIGHLY SEGMENTED 24H BEAUTY SOLUTIONS

Protects against daytime damage and harnesses the power of the night

Epiderm is a French app that connects patients with dermatologists digitally and followed up during 7 days. The dermatologists offer personalised medical advice online, whether in France or abroad.
STREAMLINED, MULTI-TASKING COLLECTIONS

Allies of Skin has three essentials to take the face through 24 hours

Designed for the “modern multi-hyphenate”.

Every product is adaptogenic and formulated to effortlessly complement all aspects of a demanding life, making the skincare process quick and easy.
### BEAUTY OCCASIONS

<table>
<thead>
<tr>
<th>Morning</th>
<th>Day</th>
<th>Evening</th>
<th>Night</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Start the day</td>
<td>• At work</td>
<td>• Post-work socialising</td>
<td>• Pre-sleep routine</td>
</tr>
<tr>
<td>• Prepare</td>
<td>• Beauty breaks</td>
<td>• Exercise</td>
<td>• Beauty</td>
</tr>
<tr>
<td>• Commute</td>
<td></td>
<td>• At home</td>
<td>• sleep</td>
</tr>
</tbody>
</table>
MORNING

- Beauty breakfast
- Prepare and protect
- Speed and convenience
The same goes for pollution and hair quality.

- 38% of Chinese consumers say that the environment (e.g., pollution, UV rays, water quality) is a major cause for hair damage.
- 20% of Chinese consumers would be willing to pay more for soap, bath and shower products that contain SPF.
- 61% of Chinese consumers would like to have whiter body skin and 47% would like to have fewer acne marks and freckles.

Base: 3000 internet users aged 20-49
Source: QQ Survey/Mintel
START OUT RIGHT WITH THE RIGHT WATER

MICOE WATER PURIFIER
FOR FACIAL WASH

Controls the pH balance of water.

A.O SMITH WATER SOFTENER

The quality of skincare is impacted by water hardness, so A.O Smith says its water softener should be used with cleansing products in China.
DUAL-PURPOSE PRODUCTS SPEED UP PREPARATION FOR THE DAY

Clinique’s pep-start products are designed to save time and energy by multi-tasking.

VOV’s eyel/lip pencils offer time-saving, convenience and long lasting colour.

18% of US personal care users wish their routine was less time consuming.
Consumers are being encouraged to continually monitor and manage their health and fitness. Beauty companies are moving in this direction too, offering round-the-clock beauty routines.

**Saborino Morning Facial Mask Minty Grapefruit**

3-in-1 sheet masks that work as a cleanser, moisturiser and make-up primer to complete the skincare routine in 60 seconds. It contains botanicals, collagen, sodium hyaluronate and vitamin C.

**Givenchy Acti’Mine Illuminating Primer**

Acti’Mine is described as a power breakfast for the skin, correcting colour and providing a flawless base to prolong foundation hold.

**Allies of Skin All-Day Mask**

Leave-on mask that claims to replicate a good night’s sleep and revive tired, stressed skin with “chirally correct” multiple peptides, antioxidants and anti-inflammatories.

**BEAUTY BREAKFAST – ENERGISING AND PROTECTING THE SKIN**

Acti’Mine is described as a power breakfast for the skin, correcting colour and providing a flawless base to prolong foundation hold.
Before heading out to work, some consumers are looking for added protection against UV and atmospheric pollution from their toiletries.

**PREPARING FOR THE COMMUTE**

- **Jay Hair Coat UV Protection Serum**
  - New formula with sakura, avocado, sunflower seed, seaweed and camellia leaf extracts and a special sort of silicone that protects the hair from heat styling, sunlight and pollutants.

- **St. Andrews East Africa Forest Dream Energizing Moisturizing Shower Cream**
  - Mild shower cream formulated with mulberry extract, camomile and sunflower extract to nourish and protect skin against UV rays, free radicals and pollution.

- **Lion Emeron Lovely Naturals Refreshing Skin Almond Oil Hand & Body Lotion**
  - Contains almond oil and double sunscreen to protect against sun rays and air pollution, while nourishing dry skin.
DAY TIME

- Office management
- Pollution protection
- Top-ups
SUN PROTECTION IS A GROWING PREOCCUPATION

40% of Chinese consumers use suncare products, up from 34% in 2015

44% of Chinese women are trying to improve their skin by adding more routines (e.g., lunch time treatments, wearing suncare at any time)
BUT POLLUTION IS
ALSO BECOMING A HUGE ISSUE

“How concerned are you about these pollution types/pollutants?” May 2015

Base: 3000 Chinese internet consumers aged 20-49
Source: QQ Survey/Mintel
CALLING OUT SPECIFIC POLLUTANTS

Manufacturers are linking their anti-pollution benefits to PM2.5, yellow dust, pollen…

<table>
<thead>
<tr>
<th>Dr. Tsuda Cosme Labo Skin Barrier Balm SPF 19/PA+++</th>
<th>Laneige All Day Anti-Pollution Defensor SPF 30</th>
<th>Hanskin City Cream</th>
</tr>
</thead>
<tbody>
<tr>
<td>Water-free formula made of 100% actives including vitamins and minerals to fortify skin's barrier function and immune system against PM2.5 and pollen, and soothe internal inflammation.</td>
<td>Skin-locking serum formulated with Dust Block technology based on the principle of magnetic reflection, said to help dispel fine dust from the skin and strengthen its barrier function.</td>
<td>Formulated with PM2.5 Repulsive Powder and Positive Magnet, whereby positive ions in the cream adhere like a magnet to the negative ions on the skin, while repelling fine dust.</td>
</tr>
</tbody>
</table>
PROTECTIVE COLOUR COSMETICS

Attenir UV Protect Powder
SPF 50+ PA++++

- Ultra-fine powder enriched with lutein, algae extract, super hyaluronic acid, stearyl glycyrrhetinate and green tea leaf extract to protect against blue light, air pollution, dryness, inflammation and oxidation.

Innoxa Pollution Protect
Foundation SPF 20

- Anti-ageing, hydrating foundation formulated with Innosoft to help purify and protect the skin from pollution and environmental stresses. The breathable formula also contains ginseng and papaya extract.

Nails Inc Gel Effect Fuelled
by Charcoal Nail Polish

- Infused with charcoal and claimed to promote nail health and protect from environmental toxins and pollutants, and give manicure a plumped look with ultimate shine.
PORTABLE SPRAYS
TOP-UP PROTECTION AND BENEFITS

Oriental Princess Story of Happiness Frangipani Bouquet Hair Cologne Spray

Perfumed spray with special nutritive coating properties to revive pollution-induced damage, while perfuming and freshening the hair.

Estée Lauder Radiant Energy Mist

Creates a post-exercise glow with pomegranate and mangosteen extracts and super berries. The on-the-go mist claims to hydrate, detoxify and protect the skin from pollution, helping it to recover its balance and radiance.

L’Oreal UV Perfect City Resist 8 Multi-Protecting Advanced Essence SPF 50+/PA++++

Said to fight eight city beauty enemies, including UVA, UVB, pollution, heat, water loss, darkening and dullness with Mexoryl, long UV filters, vitamin E and emblica extract.
DEVICES FOR CLEANER AIR

Electrostatic travel air purifier

AirTam uses electrostatic purification to create a 3 foot sphere of cleaner, healthier air around the head.

Smart purifying plant pots

Clairy plant pots have a built-in fan that guides the air to the plant’s roots, where colonies of micro organisms in the soil work as a biofilter, removing ammonia, benzene and xylene to produce fresher air. The app supplies updates about the room’s toxin, humidity and temperature levels thanks to sensors inside the pot.

Negatively charged anions

Breath Air Purifier forces pollution molecules to attach to nearby surfaces. Claims to remove odors as well as allergens.
MOBILE DEVICES MOVE PROTECTION CLAIMS IN NEW DIRECTION

Dermatologists say that High Energy Visible light emitted from phone and computer screens can penetrate the skin more deeply than UV light.

99% of Chinese consumers own a smartphone

83% of 18-34 year old Thai consumers are online

Base: 3000 UK internet users aged 20-49
Source: QQ Survey/Mintel
DIALLING UP PROTECTION WITH HEV/BLUE LIGHT CLAIMS

So far, only a handful of skincare launches have made specific links between their formulations and protection from High Energy Visible Light from personal devices. However, new actives from AQIA and Lipo are opening up possibilities in both skincare and haircare.

Dr Sebagh Supreme Day Cream Face Cream

Lancôme Ultimate XL UV Protection CC Cover SPF 50/PA++++

Skin Shop HEVL Sun Protection Face Crème SPF 50

Contains fractionated melanin compound designed to protect the skin from damaging HEV light emitted by laptops, tablets, mobile phones and LED lights.

Features blue light shield technology that focuses on the blue light in sunlight, smart phones or computers that plays a key role in skin pigmentation.

Offers triple spectrum protection with Liposhield HEV and prebiotics.
BEAUTY ON THE MOVE

- Portable beauty for commuters and travellers
- Active beauty
- Getting the most from exercise
ACTIVE COSMETICS FOR ACTIVE CONSUMERS

Sports cosmetics is a small niche but full of potential.

In Asia, sports make-up is focused on sun protection, but the trend for Dive Make-up will lead to the creation of new products.

59% of Chinese facial skincare users would be prepared to do more exercise/sports to improve their skin.

Base: 2777 internet users aged 20-49 who have used facial skincare products in the last 6 months
Source: QQ Survey/Mintel
ANY TIME, ANY PLACE, ANYWHERE

Sports cosmetics are designed to enhance the benefits of physical and mental exercise, warming up the body before a run or a gym session, prolonging the effects of yoga and pilates and helping to cool down the body after a session comes to an end.

Bel Col Slim-Fit Pre and Post-Gym Duo

Slim-Fit Before Thermic Gel and After Firming Body Cream should be applied before and after exercise to optimise calorie burn and reduce targeted fat deposits and cellulite.

Yuni Beauty

Developed by and for yogis, the Yuni products are developed to save time and to enhance, prolong and recall the effects of yoga on the mind and body.

Activbod Cooling Finish Lotion

Non-sticky product with cooling menthol, deodorising vitamin E acetate and allantoin to refresh, moisturise and finish off the user’s exercise regime.
ACTIVE COSMETICS

Single use, spray and stick formats offer portability and convenience for consumers who travel, commute or want the option to top up their freshness and make-up throughout the day.

- **8x4 Wakiase EX Cream Capsule Deodorant**
- **Peter Thomas Roth Balancing Essence Water Mist**
- **tresStique Tint, Moisturize & Blend Face Stick**

Each single-use capsule contains a rich deodorant cream that features anti-perspirant and natural antibacterial ingredients.

On-the-go care to help detoxify, hydrate, refresh and soothe skin with cucumber extract, hyaluronic acid and camomile.

Cream-gel tinted moisturiser formulated with coconut oil, offering light-as-air coverage and a powder finish for on-the-go and travel beauty.
EVENING/NIGHT

- Repair, restore, reinforce
- Beauty sleep
- Pillow safe
GET MORE SLEEP

72% of Chinese consumers would improve the quality of their sleep to improve the condition of their skin.

3000 Internet users aged 20-49
QQ Survey/Mintel
GET THE PARTY STARTED

Sephora The Big Night Out Survival Kit

Designed to take care of skin from top to toe, the kit includes Green Tea Face Mask, Charcoal Nose Strip, Pearl Eye Mask, Rose Lip Mask, Pomegranate Face Mask, Aloe Vera Hand Mask and Lavender Foot Mask.

Clarins Booster Detox

Ultra concentrated formula enriched with green coffee extract to revive radiance and plump skin which helping it recover from partying, overindulging, extreme pollution and smoky environments.

Patchology FlashPatch Lip Gels

A 5-minute quick fix for lips said to be ideal for travel, jet lag, a morning-after pick-me-up or for pre-party prep. The product uses micro-current patch technology that delivers yeast amino acids, trehalose, taurine, inositol and betaine to moisturise, protect, firm and plump the lips.
SLEEP PROMOTING AND ENHANCING

This Works Dream Body Night Cream

2-in-1 cream designed to de-age skin and promote better sleep, while maximising beauty sleep with a time-release system of pure essential oils, amino acids and retinol.

Estée Lauder Crescent White Full Cycle Brightening Night Finishing Treatment

Works in perfect rhythm with the skin’s own daily cycle to protect against daily aggressions. The treatment for the face, neck and decolletage helps soothe irritation which can peak at night and lead to pigmentation.

Shiseido Ibuki Beauty Sleeping Mask

Leave-on gel mask that contains condensed vitamin capsules to leave skin looking and feeling fully refreshed, radiant, dewy and well rested even after a night of inadequate sleep.
OVERNIGHT TREATMENT FOR HAIR AND NAILS

Living Proof Night Cap Overnight Perfector

Fast-absorbing and pillow-safe treatment that targets the hair from inside out. Healthy Hair Molecule combined with long lasting cuticle sealing technology smooths the cuticle and reduces pigment loss, while amino acid and time-release conditioners condition and protect hair from styling damage and environmental assaults.

Nails Inc Overnight Detox Mask Nail Treatment

Intensive gel-based mask designed to treat, repair and regenerate damaged nails with green tea, acai berry and spirulina, and said to leave nails hydrated, healthier and glossier overnight. It features a light green tea fragrance.
WHAT’S NEXT

• Bento beauty
• 24-hour beauty management
NEW TARGETS: TWEENS AND TEENS

81%
of 10-15 year olds who use a mobile device in the UK use a second screen while they watch TV

Base: 1003 internet users aged 10-15 who use smartphones, tablets or laptops; 10141 internet users aged 1
MOVING TOWARDS CONNECTED BEAUTY BATHROOMS AND REGIMENS

Google has filed patents outlining designs for ultrasonic bathtubs, pressure-sensing toilets, electricity and pressure-sensing mats and colour recognition mirrors. These are designed to track changes in weight, blood pressure and organ health.

Panasonic’s new mirror not only diagnoses skin condition, it also prints out 3-D skin to mask imperfections.
The bento box would be carried around for on-the-go solutions to beauty needs throughout the day.
Sony and Neal’s Yard Remedies have teamed up to create Aromastic, a personal scent companion.

A turn of the dial selects the right fragrance for the right time of day or occasion, warding off physical, mental and emotional fatigue.
Thank You!

Sharon Kwek Si Ling
Senior Innovation and Insights Analyst
(Beauty & Personal Care)