Research coverage

12 OFFICE LOCATIONS
London, Chicago, Singapore, Shanghai, Vilnius, Santiago, Dubai, Cape Town, Tokyo, Sydney, Bangalore, and São Paulo

80 COUNTRIES
in-depth analysis on consumer goods and service industries

210 COUNTRIES
+ demographic, macro- and socio-economic data on consumers and economies

© Euromonitor International
Research expertise

**Consumer Products**
- Alcoholic Drinks
- Apparel
- Automotive
- **Beauty and Personal Care**
- Consumer Appliances
- Consumer Electronics
- Consumer Health
- Eyewear
- Fresh Food
- Health and Wellness
- Home and Garden
- Home Care
- Hot Drinks
- Luxury Goods
- Ethical Labels

**Supply**
- Ingredients
- Packaging

**Economies**
- Business Dynamics
- Cities
- Economy, Finance and Trade
- Industrial

**Consumers**
- **Digital Consumer**
- Consumer Finance
- Consumer Foodservice
- Institutional Channels
- Retailing
- Travel

**Services**
- Income and Expenditure
- Lifestyles
- Households
- Population
ABOUT EUROMONITOR INTERNATIONAL

INDUSTRY SNAPSHOT

ASIAN BEAUTY CONSUMER TRENDS

CUSTOMISATION

WELL-BEING

DIGITALISATION

CONCLUSION: FUTURE OF BEAUTY IN ASIA
Global Beauty and Personal Care Value Sales
Constant 2015 prices, Fixed 2015 exchange rate

Value Sales

% Growth

US$ billion

2010 2011 2012 2013 2014 2015

© Euromonitor International
Beauty and Personal Care Value Sales by Region in 2015

- Asia Pacific: 32%
- Western Europe: 21%
- North America: 21%
- Latin America: 14%
- Middle East & Africa: 6%
- Eastern Europe: 5%
- Australasia: 1%
Beauty and Personal Care Value Sales Growth
Developing vs Developed Asia

- India
- ID MY PH TH VN
- China
- Asia Pacific
- HK JP KR SG TW
Beauty and Personal Care Value Sales by Category 2015

- Skin Care
- Hair Care
- Colour Cosmetics
- Men’s Grooming
- Fragrances
- Oral Care
- Bath and Shower
- Deodorants
- Baby & Child-specific
- Sun Care
- Depilatories

USD Million

© Euromonitor International
ABOUT EUROMONITOR INTERNATIONAL

INDUSTRY SNAPSHOT

ASIAN BEAUTY CONSUMER TRENDS

CUSTOMISATION

WELL-BEING

DIGITALISATION

CONCLUSION: FUTURE OF BEAUTY IN ASIA
Demands of the Evolving Consumer

Key Finding 1: Customisation

Key Finding 2: Well-Being

Key Finding 3: Digital
Key Finding 1: Customisation
Consumers want products tailored to their needs

When you last purchased a skin care product, which of the product features listed below most influenced your choice?
Key Finding 1: Customisation
Consumers want products tailored to their needs

When you last purchased a hair care product, which of the product features listed below most influenced your choice?

### GLOBAL RESULTS

<table>
<thead>
<tr>
<th>Feature</th>
<th>Year</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suited to my hair type</td>
<td></td>
<td>51.3</td>
</tr>
<tr>
<td>Value for money</td>
<td></td>
<td>47.4</td>
</tr>
<tr>
<td>Super-high quality</td>
<td></td>
<td>32.2</td>
</tr>
<tr>
<td>Low price</td>
<td></td>
<td>31.0</td>
</tr>
<tr>
<td>Strong or well known brand</td>
<td></td>
<td>30.8</td>
</tr>
<tr>
<td>Functions and/or benefits</td>
<td></td>
<td>29.5</td>
</tr>
<tr>
<td>Natural or organic</td>
<td></td>
<td>28.9</td>
</tr>
</tbody>
</table>

### SUITED TO MY HAIR TYPE

<table>
<thead>
<tr>
<th>Country</th>
<th>Year</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td></td>
<td>0%</td>
</tr>
<tr>
<td>Brazil</td>
<td></td>
<td>0%</td>
</tr>
<tr>
<td>China</td>
<td></td>
<td>983</td>
</tr>
<tr>
<td>Colombia</td>
<td></td>
<td>968</td>
</tr>
<tr>
<td>France</td>
<td></td>
<td>965</td>
</tr>
<tr>
<td>Germany</td>
<td></td>
<td>981</td>
</tr>
<tr>
<td>India</td>
<td></td>
<td>943</td>
</tr>
<tr>
<td>Indonesia</td>
<td></td>
<td>947</td>
</tr>
<tr>
<td>Italy</td>
<td></td>
<td>952</td>
</tr>
<tr>
<td>Japan</td>
<td></td>
<td>930</td>
</tr>
<tr>
<td>Mexico</td>
<td></td>
<td>982</td>
</tr>
<tr>
<td>Middle East</td>
<td></td>
<td>899</td>
</tr>
</tbody>
</table>
Key Finding 1: Customisation
Consumers want products tailored to their needs

Degree of Customisation:
- For sensitive skin
  - Dr Jart Calm Your Sensitive Skin Mask
- Activity-based solution
  - Belief First Aid Anti-Hangover Mask
- Personalised solution
  - Skin Inc Daily Dose Custom Blended Cockatil
Key Finding 1: Customisation

Multicultural Beauty
Extending beauty solutions to consumers of all ethnicities, tailoring products to meet needs of ethnic groups.

Forecast 2015-2020 CAGR

Growth driven by

Regional Markets
Ethnic Consumers in Western Markets
Key Finding 1: Customisation

Multicultural Beauty

Ethnicity
Solutions catering to unique physiological traits

Culture
Solutions on the basis of religion, culture & tradition

Climate
Solutions based on geographical environment
Key Finding 1: Customisation

Image source (clockwise from Herborist), Herborist, Paulaschoice, SoftSheen Carson, Laneige, Clarins, Forbes, Wardah
Multicultural Beauty
Case Study: Success of Halal beauty among Muslim consumers

“Halal is an Arabic word for ‘that which is lawful or permitted.’

Halal cosmetics are ethical beauty products rooted in the science of ‘Halal’ and free of impurities such as pig fat, gelatin, keratin and other animal-derived ingredients, (ethyl) alcohol and harsh chemicals such as sulfates and parabens.”

- Mauli Teli, CEO of Iba Halal Care
Key Finding 1: Customisation

Multicultural Beauty
Case Study: Success of Halal beauty among Muslim consumers

Wardah Sales in Indonesia

<table>
<thead>
<tr>
<th>Year</th>
<th>Billion local currency</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>200</td>
</tr>
<tr>
<td>2012</td>
<td>300</td>
</tr>
<tr>
<td>2013</td>
<td>400</td>
</tr>
<tr>
<td>2014</td>
<td>600</td>
</tr>
<tr>
<td>2015</td>
<td>1200</td>
</tr>
</tbody>
</table>
Key Finding 1: Customisation

Multicultural Beauty
Case Study: Success of Halal beauty among Muslim consumers

Source: Martha Tilaar

Source: Pakmediablog

Source: easyliving.ae
Key Finding 1: Customisation

Key Finding 2: Well-Being

Key Finding 3: Digital

Demands of the Evolving Consumer
Key Finding 2: Well-being
Increasingly health conscious Asian consumers transform consumption habits

Wellness

Holistic
- Physical & Mental Health
- Fitness

Lifestyle
- Apparel & Fashion
- Food choices
- Gym memberships

APAC Sales of Activity Wearables
million units

Source: Nike
Key Finding 2: Well-being

Increasingly health conscious Asian consumers transform consumption habits

Bobbi Brown Long Wear

Implications

Colour cosmetics & skincare for active lifestyles

Quest for prevention: anti ageing, anti hair fall

Rise of natural & dermatological brands

© Euromonitor International
### Key Finding 2: Well-being
Increasingly health conscious Asian consumers transform consumption habits

#### Growth of Natural Brands in Asia

<table>
<thead>
<tr>
<th>Company</th>
<th>Brand</th>
<th>% CAGR 2010-2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shanghai Kans Cosmetics Co Ltd</td>
<td>KanS</td>
<td>85%</td>
</tr>
<tr>
<td>AmorePacific Corp</td>
<td>Innisfree</td>
<td>56%</td>
</tr>
<tr>
<td>Nature Republic Co Ltd</td>
<td>Nature Republic</td>
<td>40%</td>
</tr>
<tr>
<td>Shanghai Jahwa United Co Ltd</td>
<td>Herborist</td>
<td>27%</td>
</tr>
<tr>
<td>L'Occitane International SA</td>
<td>L’Occitane</td>
<td>7%</td>
</tr>
</tbody>
</table>
Demand of the Evolving Consumer

- Key Finding 1: Customisation
- Key Finding 2: Well-Being
- Key Finding 3: Digital
Key Finding 3: Digital
Asian consumers drive digital retailing

Global
15%
CAGR 2010-2015

Asia Pacific
25%
CAGR 2010-2015
Key Finding 3: Digital

APAC consumers drive M-Commerce

Trigger impulse but informed decisions

Challenge: Consumers tend to browse limited apps

Retailing Remote Purchases: Top Eight Markets by Device

- Brazil
- Russia
- Australia
- India
- Japan
- UK
- US
- China

Retail value sales (US$ billion) 2015

© Euromonitor International
Key Finding 3: Digital
Understanding Asia’s digital retailing landscape

Developed Asia
- High internet penetration rates
- Secure online payment methods

Developing Asia
- Poor infrastructure for connectivity
- Cash payment upon delivery
- Rise of non-urban internet retailing sales
Key Finding 3: Digital
Understanding Asia’s digital retailing landscape

Indonesia

Source: Jarkata Hari Ini

Source: dcs-korea.sg

Source: ageless-online.net

China

Yu Ni Fang

Source: Aliexpress

Source: taobao.com

Source: JD.com

Source: vip.com
ABOUT EUROMONITOR INTERNATIONAL
INDUSTRY SNAPSHOT
ASIAN BEAUTY CONSUMER TRENDS
CUSTOMISATION
WELL-BEING
DIGITALISATION

CONCLUSION: FUTURE OF BEAUTY IN ASIA
CONCLUSION: FUTURE OF SKIN CARE

Beauty & Personal Care Outlook in Asia

Asia Beauty and Personal Care Value Sales
Constant 2015 prices, Fixed 2015 exchange rate

© Euromonitor International
Growth strategies in Asia

**Customisation**
- Tailored products
- Multicultural Beauty

**Well-being**
- Active lifestyles
- Quest for prevention
- Natural Ingredients

**Digital**
- M-Commerce
- Adapting to regional differences
THANK YOU FOR LISTENING

Joanna Chan
Research Analyst
Joanna.chan@euromonitor.com

For press enquiries, please contact:
Benedicte Dia
Communications Manager
Benedicte.dia@euromonitor.com

CONNECT WITH US!

http://blog.euromonitor.com/