



KEN RESEARCH

DECEMBER

2012

China Wellness Industry Outlook to 2016

- Potential Opportunities in Tier 2 and
Tier 3 Cities in China

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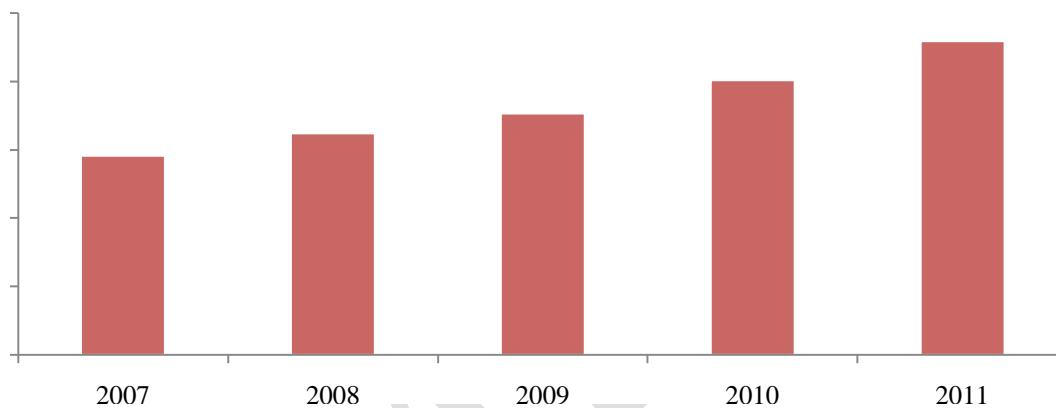
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CHINA WELLNESS INDUSTRY MARKET SIZE BY REVENUE, 2007-2011

... The wellness industry in China has grown at a CAGR of ~% during the period 2007-2011. In 2011, the revenue generated by the industry in the country increased by ~% to USD ~ million as compared to USD ~ million in 2010.

Figure: China Wellness and Fitness Industry Market Size on the Basis of Revenue in USD Million, 2007-2011



MARKET SHARE OF THE HEALTH CLUB MARKET IN CHINA, 2011

...Tera wellness is as one of the leading fitness centers in Asia-Pacific region with around 1 million members. The fitness center was founded in 2001 in Shanghai. The fitness center operator had around ~ clubs in cities such as Beijing, shanghai, Guangzhou and Shenzhen and other large cities in China in 2011. In July 2012, the company experienced less than ~% increase in the new members in the recent past...

Figure: China Health Club Market Share by Domestic and Foreign Health Clubs on the Basis of Members in Percentage, 2011

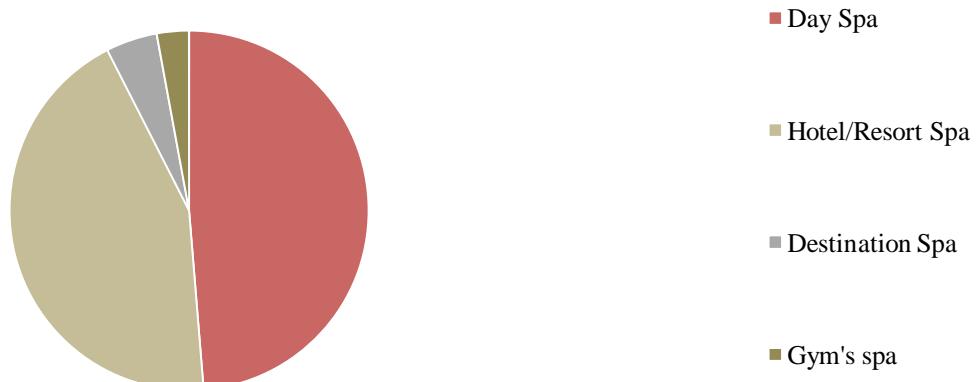


CHINA SPA INDUSTRY MARKET SEGMENTATION

BY TYPE OF SPA, 2011

...The day spa in 2011 contributed around ~% of the total revenue generated by the spa industry in China in the same year...The gym spas are one of the fast emerging spa centers in the country...

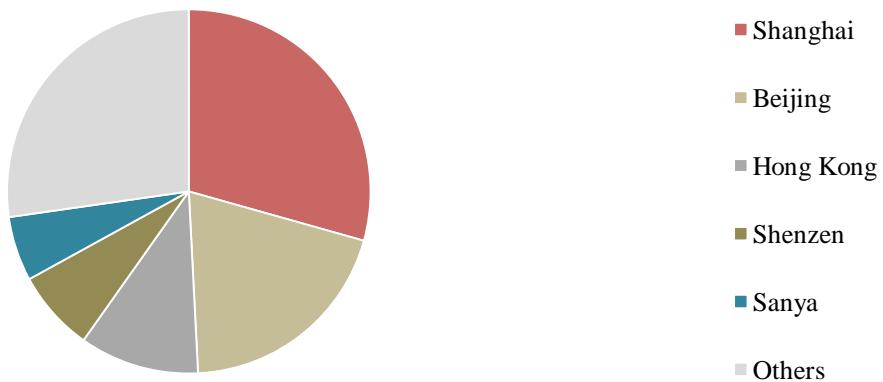
Figure: China Spa industry Market Segmentation by Day Spa, Hotel Spa, Destination Spa and Gym Spa on the Basis of Revenue in Percentage, 2011



BY GEOGRAPHY

... Another predominant market in 2011 was Hong Kong which contributed around ~% of the total spa revenue in China in 2011.

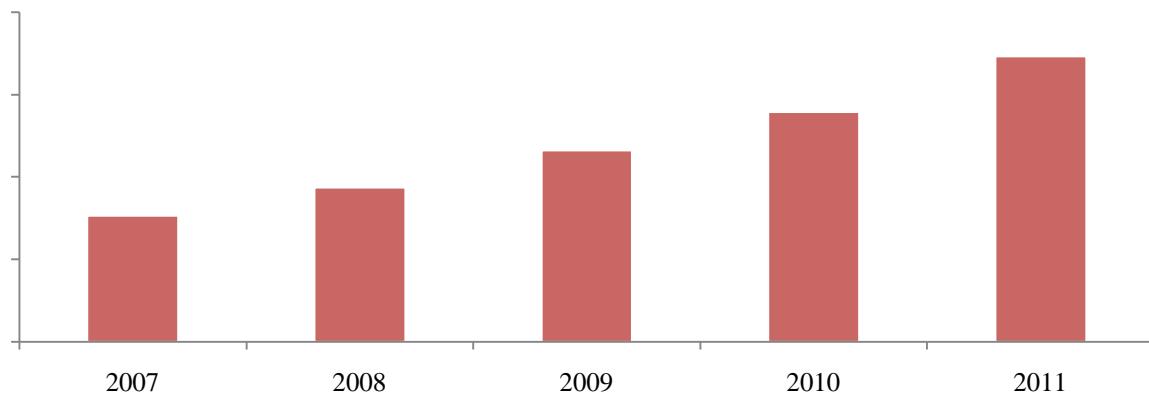
Figure: China Spa industry Market Segmentation by Geography on the Basis of Revenue in Percentage, 2011



CHINA RETAIL COSMETICS PRODUCTS MARKET INTRODUCTION AND SIZE, 2007-2011

The retail market of cosmetic products in China over the years has showcased a significant CAGR of ~% during 2007-2011 on account of the strong demand for cosmetics and beauty products amongst the people in China, especially women...

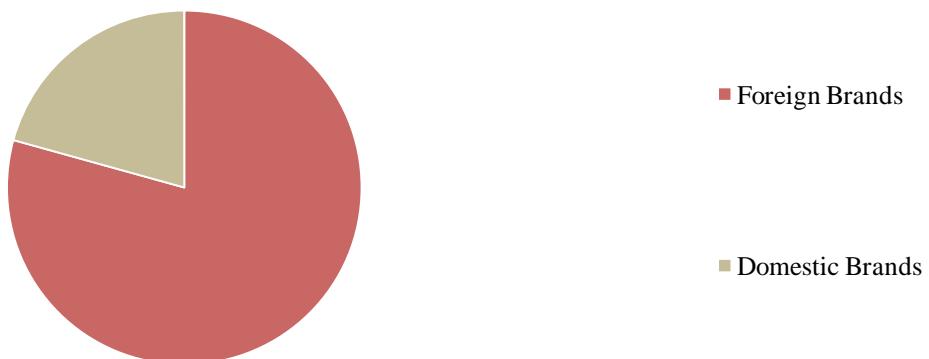
Figure: China Retail Cosmetics Products Market Size on the Basis of Revenue in USD Million, 2007-2011



SKIN CARE MARKET COMPETITION

China's skin care market is buoyed with numerous skin care brands comprising of both domestic and international. In 2011, around ~% of the retail cosmetic sales were dominated by the foreign or international brands...However; domestic skin care product manufacturer such as Chcedo and Herboist has garnered approximately ~% in 2011...

Figure: China Skin care Retail Market Segmentation by Foreign and Domestic Brands, 2011



MEN'S SKIN CARE MARKET COMPETITION

Table: Competitive Landscape of Men's Skin care Market in China, 2011

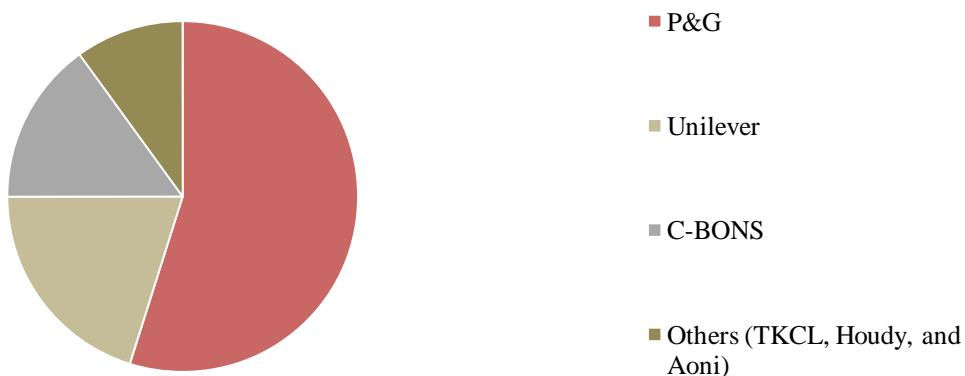
Particulars	Key facts
L'Oreal 	•
Shanghai Jahwa United 	•
Beiersdorf 	•

Source: Company Reports

CHINA HAIR CARE MARKET COMPETITION

As of 2011, around ~ brands and ~ manufacturers have been engaged in the production of shampoo and hair-care product in China, which clearly showcased the intensity of competition in the hair care products market in the country...

Figure: Market Share of Major Players in the Hair Care Market in China on the Basis of Sales in Percentage, 2011

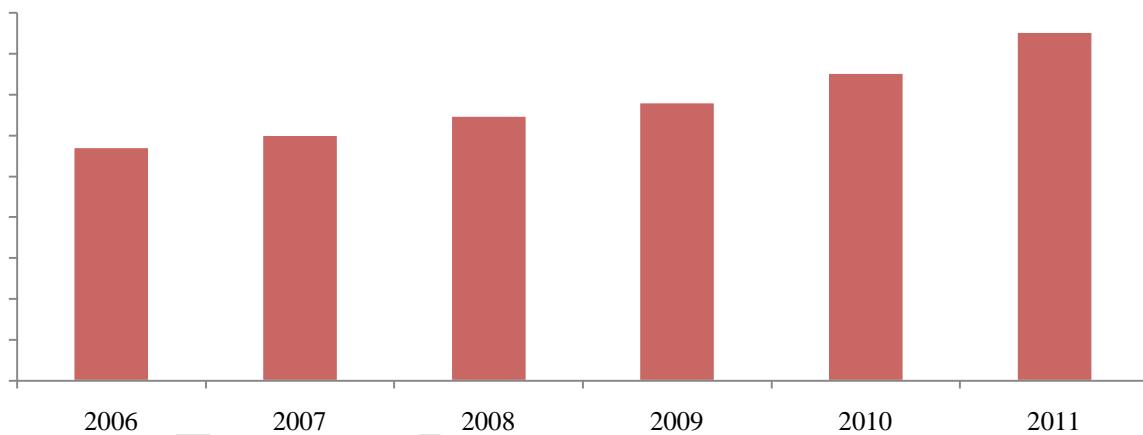


CHINA BEAUTY SALON INDUSTRY

INTRODUCTION AND MARKET SIZE, 2007-2011

The beauty salon market in China grew at a compound annual growth rate (CAGR) of ~% during the period 2006-2011. The market in 2011 grew by ~% to USD ~ million as compared to USD ~ million in 2010...

Figure: China Beauty Salon Industry Market Size on the Basis of Revenue in USD Million, 2006-2011



COMPETITIVE LANDSCAPE OF NUTRITION AND DIETARY SUPPLEMENTS IN CHINA, 2011

Table: China Nutrition and Dietary Supplements Market Competitive Landscape, 2011

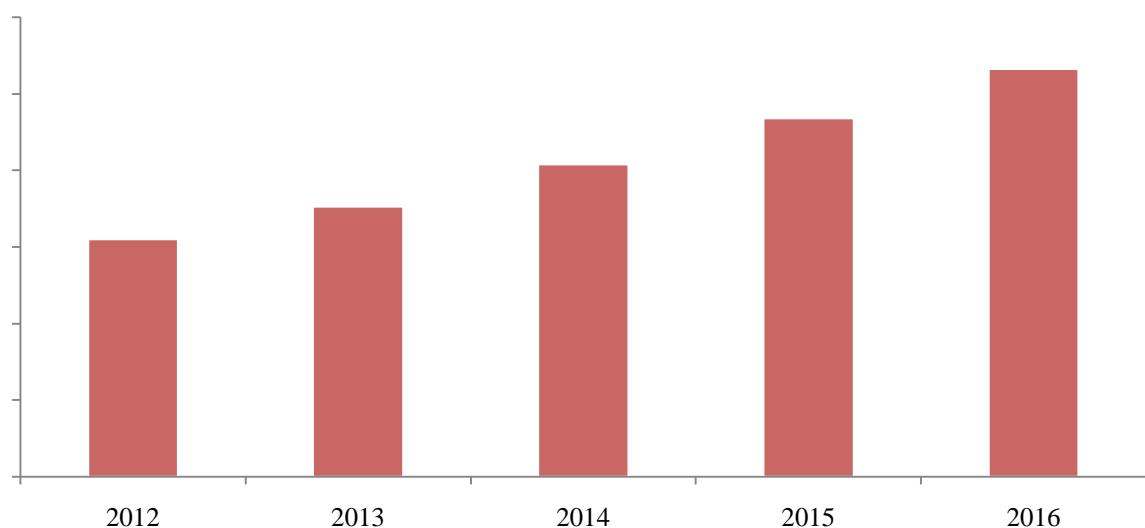
Major Companies	Company Overview	Financial Performance	Key Facts/ Recent Developments
North China Pharmaceutical Group 	▪	▪	

Royal DSM	▪	▪	▪
 DSM BRIGHT SCIENCE. BRIGHTER LIVING.			
Amway	▪	▪	▪
			
Biostime Inc	▪	▪	▪
			

CHINA NUTRITION AND DIETARY SUPPLEMENTS MARKET FUTURE OUTLOOK AND PROJECTIONS, 2012-2016

The nutritional and dietary supplements market in China is expected to record sales of USD ~ million in 2012 and is further projected to grow to USD ~ million by 2016 at a 5 year CAGR of ~%.

Figure: China Nutrition and Dietary Supplements Market Future Projections on the Basis of Revenue in USD Million, 2012-2016



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