



KEN RESEARCH

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India Wellness Industry Outlook to 2016

- Robust Growth in Alternative Therapy
and Nutraceuticals Market

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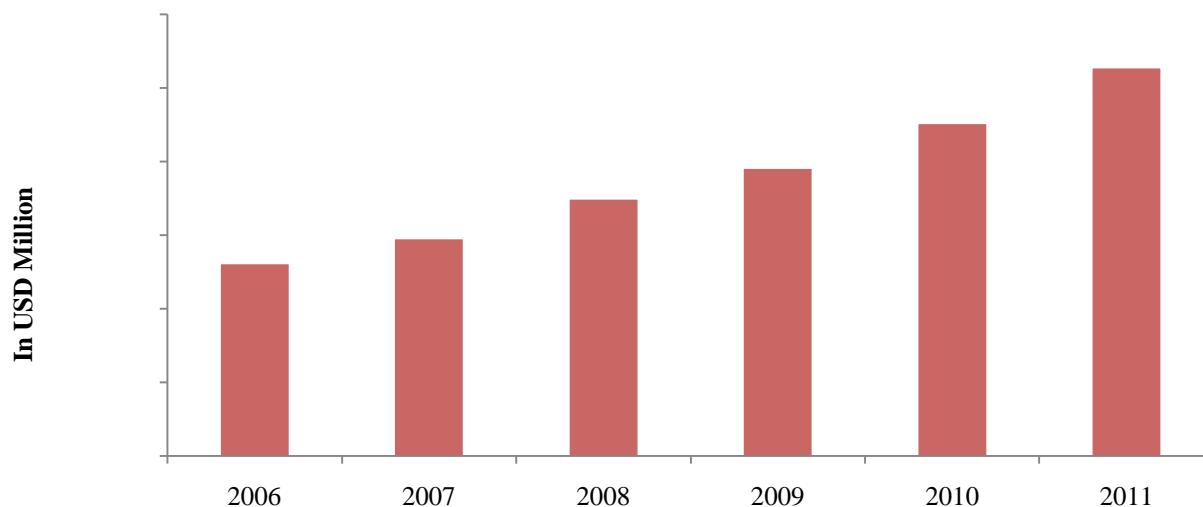
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INDIA WELLNESS INDUSTRY MARKET SIZE BY REVENUE, 2006-2011

...The wellness industry in India in 2011 grew by 16.9% to USD ~million (INR ~ billion) over USD 8,456.1 million (INR ~ billion) in the year 2010. The market in India is generally driven by the urban population majorly within the age group of 25-49 years, especially the working professionals. The market in India is much prominent in the tier-1 cities such as Mumbai, Delhi NCR, Bengaluru, Hyderabad, Kolkata and several others...

Figure: India Wellness Market Size on the Basis of Revenue in USD Million, 2006-2011

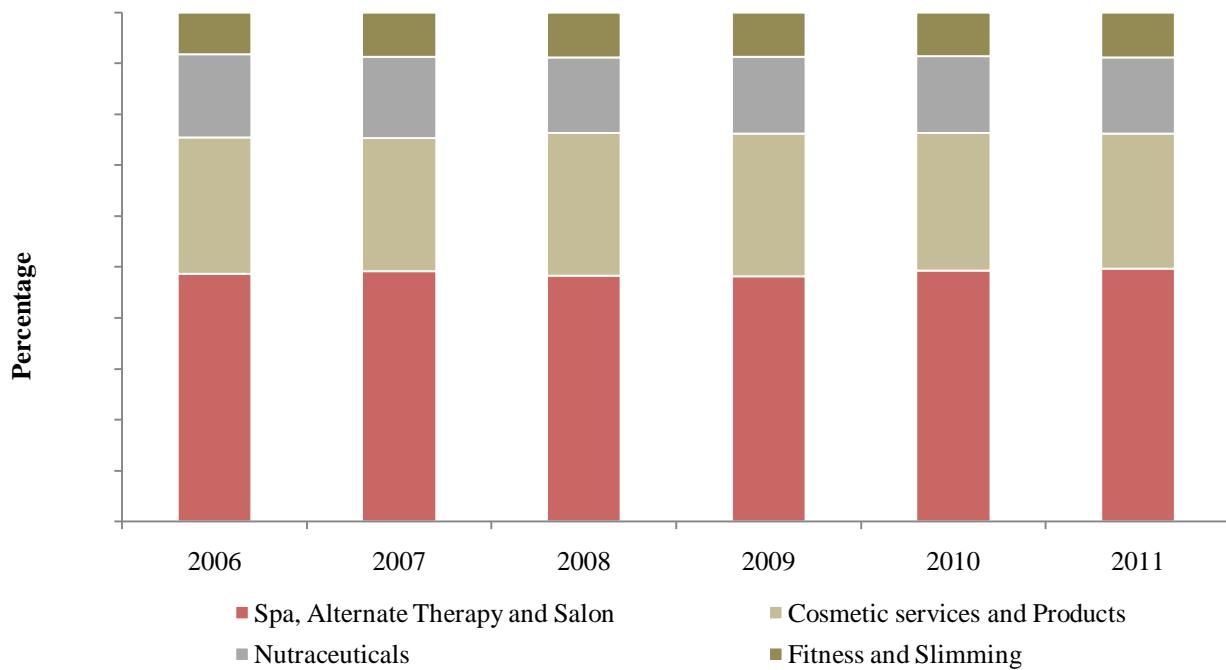


INDIA WELLNESS INDUSTRY SEGMENTATION, 2006-2011

BY TYPE OF PRODUCTS AND SERVICES

The wellness industry in India was majorly contributed by the Spa, Alternate Therapy and Salon market. The segment contributed around 49.7% of the total wellness industry in 2011 of which the alternate therapy market is the largest category, followed by salons and spas.

Figure: Indian Wellness Market Segmentation by Wellness Categories on the Basis of Revenue in Percentage, 2006-2011



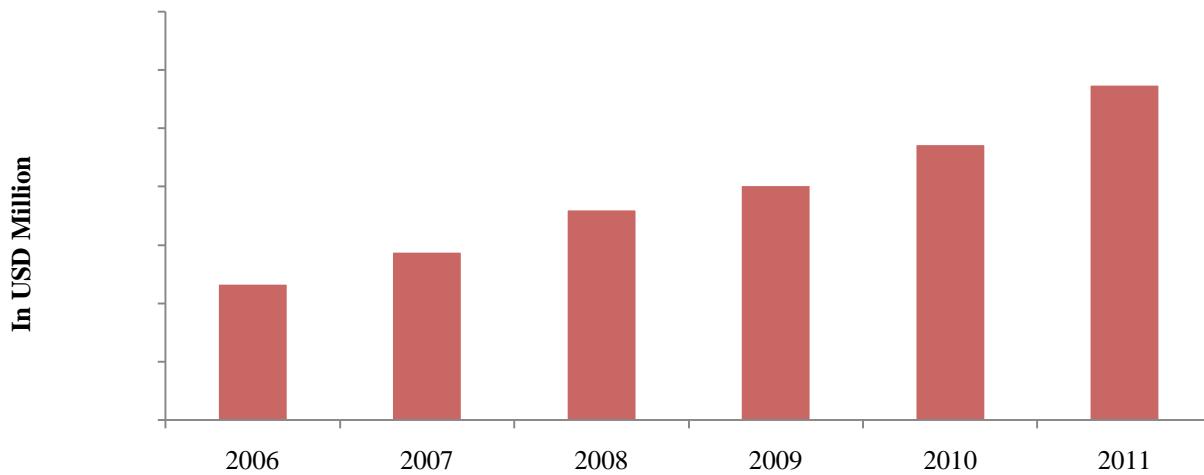
INDIA FITNESS AND SLIMMING MARKET

INDIA FITNESS AND SLIMMING MARKET SEGMENTATION, 2006-2011

BY FITNESS AND SLIMMING SERVICES, 2006-2011

...The fitness and slimming services market during the period 2006-2011 has grown at a CAGR of 19.7%. In 2011, the market grew by ~% to USD ~ million as compared to USD ~ million in 2010.

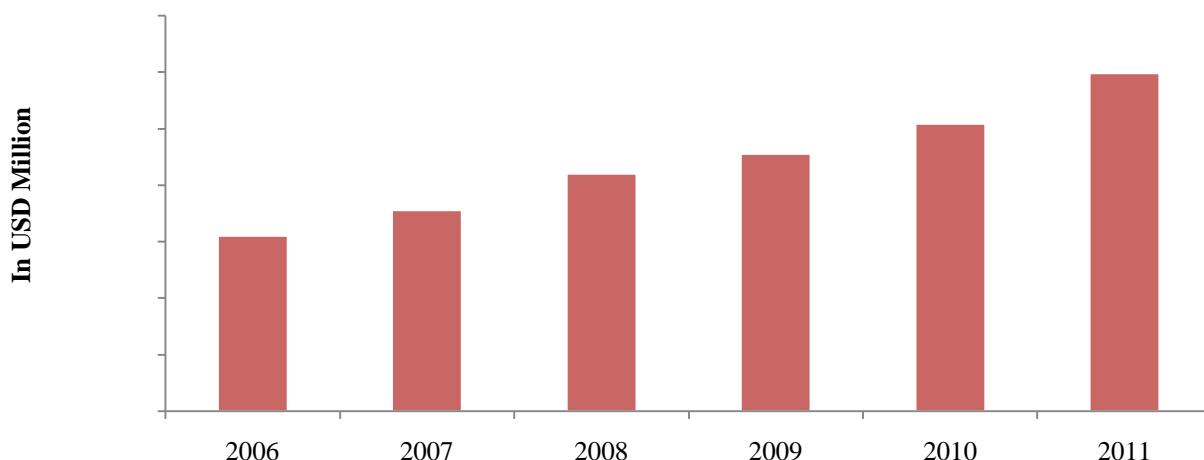
Figure: India Fitness and Slimming Services Market Size on the Basis of Revenue in USD Million, 2006-2011



BY FITNESS AND SLIMMING PRODUCTS, 2006-2011

The fitness and slimming products market contributed around 34.2% of the fitness and slimming market in India in the year 2011. The market during the year 2006-2011 has registered a CAGR of 14.0% driven majorly by the well off busy professionals who prefer to set up gym equipments in their house in order to stay fit and save the time involved in taking fitness sessions in the fitness or slimming centers...

Figure: India Fitness and Slimming Products Market Size on the Basis of Revenue in USD Million, 2006-2011



COMPETITIVE LANDSCAPE OF MAJOR FITNESS AND SLIMMING CENTERS IN INDIA, 2011

Table: Competitive Landscape of Major Fitness and Slimming Centers (VLCC, Gold Gym and Talwalkers) in India, 2011

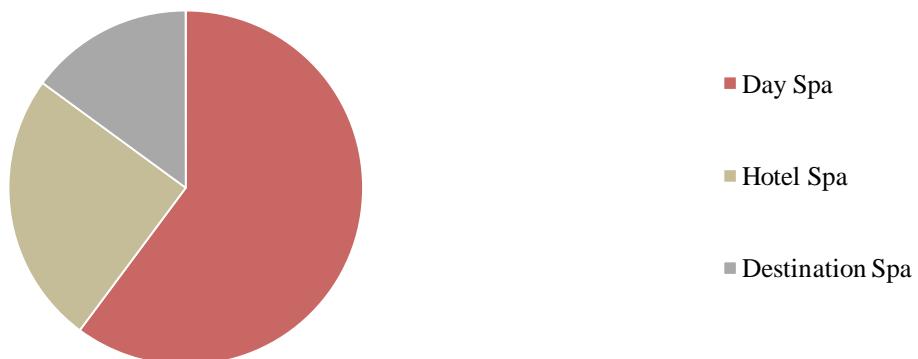
Company	Company Overview and Key Facts
 VLCC <small>Slimming Beauty Fitness</small>	<ul style="list-style-type: none"> VLCC was incorporated in October 1996 as VLSS Healthcare Limited (VLCCHL). The company offers several services such as beauty services, fitness and health services across India and UAE In India the company is operated under the parent group VLCCHL and the international operations are carried out by VLSS International Inc (VLCCII) The company also engaged in offering vocational training across India In 2011, VLCC operates 160 slimming, beauty & fitness centers in India of which 40 are franchise centers
	<ul style="list-style-type: none"> Gold's Gym is a US based health club chain, which in as of 2011 had a total of 700 gym centers across the world, with 180 gyms in US
	<ul style="list-style-type: none"> Talwalkars was founded in 1932, which later in 2003 was co-promoted by the Talwalkars Group and the Gawande group and thereby was incorporated a Talwalkars Better Value Fitness(TBVF)

INDIA SPA, SALON AND ALTERNATE THERAPY (AYUSH) MARKET

INDIA SPA INDUSTRY MARKET SEGMENTATION, 2011

The spa industry over the years has transitioned from hotel and destination spa for the elite class of the society to affordable spas for middle income population. The spa industry in India is largely contributed by the day spa segment considerably due to the affordability of such kind of spa treatment as compared to hotel or destination spa...

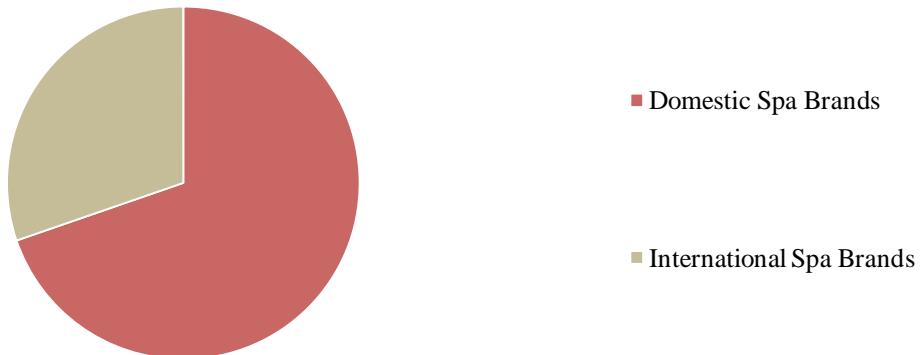
Figure: India Health Spa Market Segmentation on the Basis of Revenue in Percentage, 2011



COMPETITIVE LANDSCAPE OF SPA CHAINS IN INDIA, 2011

The spa industry in India has witnessed an immense inflow of new domestic spa centers especially day spa and destination spas, probably due to the fast emerging preference about wellness products and services amongst the population in the urban and semi-urban areas. Additionally, the rising disposable income and the growing stress level on account of long working hours have supplemented the development of domestic spa centers in the country in the recent past. The domestic spa chains in India contributed around ~% of the overall spa market revenue in 2011.

Figure: India Spa Market Competition by Domestic and International Spa brands on the Basis of Revenue in Percentage, 2011



EMERGING DOMESTIC SPA CHAINS

Table: Competitive Landscape of the Emerging Domestic Spa Chains in India, 2011

Company	Company Description
 Birla Pacific MEDSPA LTD	
 Mystic Salon & Spa	
 The Four Fountains™ SPA	

FOREIGN SPA CHAINS IN INDIA

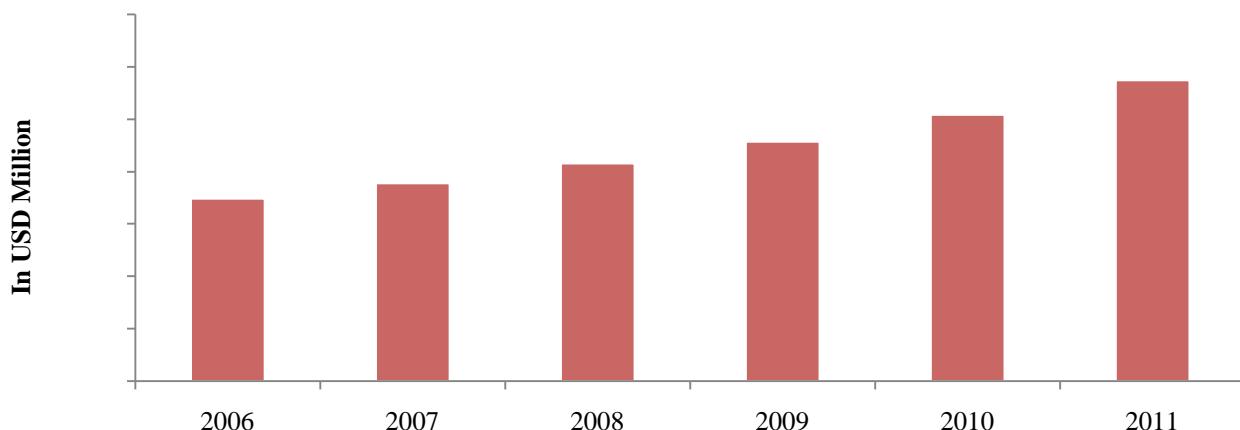
Table: Competitive Landscape of the International Spa Chains in India, 2011

Foreign Players	Key Facts
	▪
	▪
	▪
	▪

INDIA ALTERNATE THERAPY MARKET SIZE BY REVENUE, 2006-2011

... The market over the years has grown at a CAGR of 12.4% during the period 2006-2011. The alternative therapy market in 2011 was valued at USD 2,210.0 million...The alternate therapy in India is now provided in the modern medical and healthcare centers including the spa centers along with some of the largest allopathic hospitals with an objective to reduce recuperation time. Yoga centers in the country have been growing remarkably along with spas that offer herbal or ayurvedic treatments

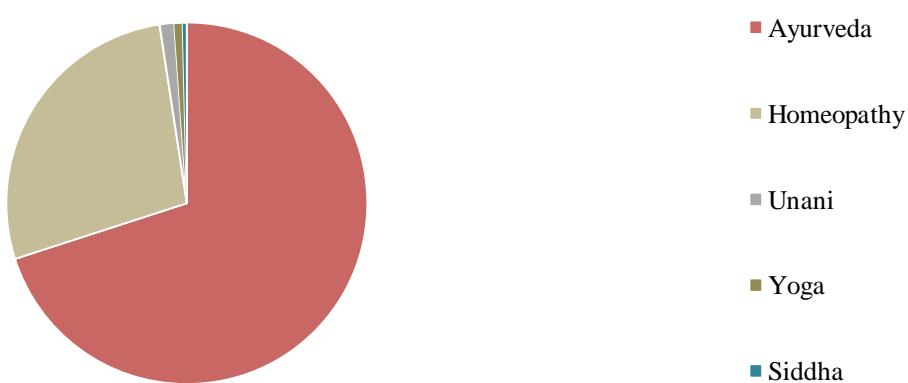
Figure: India Alternate Therapy (AYUSH) Market Size on the Basis of Revenue in USD Million, 2006-2011



INDIA ALTERNATE THERAPY (AYUSH) MARKET SEGMENTATION, 2011

The alternate therapy market was majorly contributed by the ayurvedic medicine segment. The growing demand for ayurvedic medicines and related therapy contributed around ~% of the overall alternate therapy market in 2011. The market was followed by an emerging demand for homeopathy therapies majorly for skin care, hair care and respiratory problems in the same period. Unani, Yoga and Siddha accounted for approximately ~%, ~% and ~% of the alternate therapy market revenue in 2011

Figure: India Alternate Therapy (AYUSH) Market Segmentation by Ayurveda, Yoga, Unani, Siddha and Homeopathy on the Basis of Revenue in Percentage, 2011



COMPETITIVE LANDSCAPE OF MAJOR SALON OPERATORS IN INDIA, 2011

Table: Competitive Landscape of Major Salon Operators in India, 2011

Company	Company Description
JAWED HABIB	
 natulails [®] INDIA'S NO.1 UNISEX SALON & SPA Experience the Art of Caring	
 YLG SALON & SPA	

INDIA COSMETIC PRODUCTS MARKET

INDIA COSMETIC PRODUCTS SEGMENTATION, 2007-2011

The cosmetic products market in India has been upheld by the skin care segment over the years. The contribution of the segment has increased from ~% in 2007 to ~% in 2011 due to the inflating demand for fairness products amongst women and the men category especially in the urban and semi-urban areas in India...

Table: India Cosmetics Products Segmentation on the Basis of Revenue in USD Million, 2007-2011

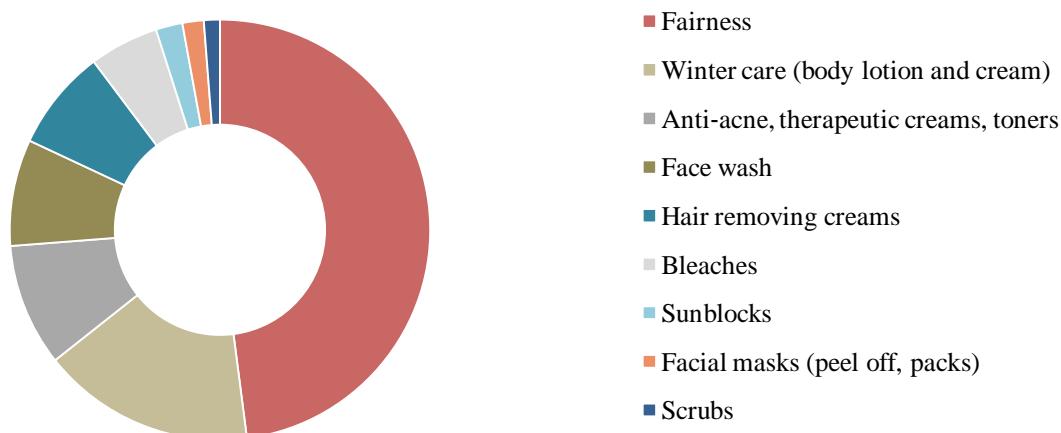
Particulars	2007	2008	2009	2010	2011
Skin Care					
Hair Care					
Men's Grooming					
Deodorants & Perfumes					
Color Cosmetics					
Total					

INDIA SKIN CARE MARKET

INDIA SKIN CARE MARKET SIZE AND SEGMENTATION

...The market for skin care has been dominated by the fairness cream products market. This category of the product contributed around ~% of the overall skin care market sales in 2011. The market in the recent years has been overwhelmed by the surge in the demand for fairness products from the male segment of the population in India. Brands such as Fair and lovely, Menz Active, Fair and Handsome, Garnier light have been successful to cater to the Indian male grooming segment with their specialized fairness cream for men....

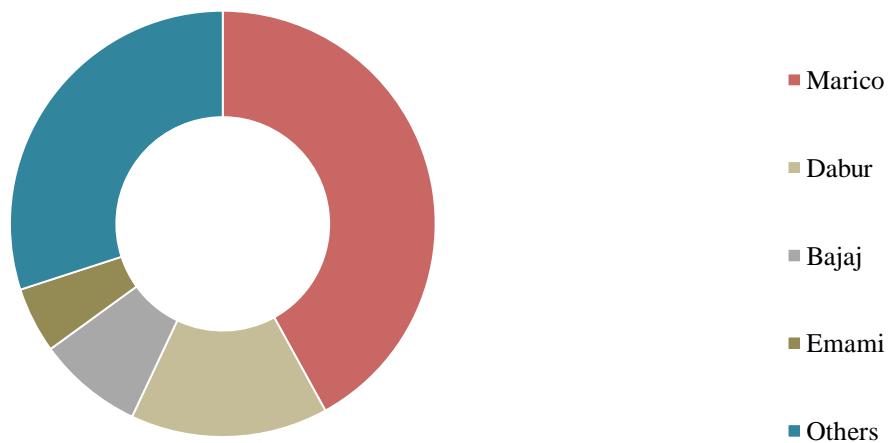
Figure: India Skin Care Market Segmentation on the Basis of Revenue in Percentage, 2011



MARKET SHARE OF MAJOR PLAYERS IN THE HAIR CARE MARKET IN INDIA, 2011

Emami in the hair oil segment has garnered ~% a market share in the Indian hair oil market with its hair oil brand Navratna. Although being one of the costliest hair oil brands in the Indian market, the brand Navratna in 2011 has accounted for approximately 54% of the cool hair oil segment in India. The positioning of the brand Navratna as a stress buster and cool hair oil has aided the company to cater to the masses especially during the summer season.

Figure: Market Share of Major Players in the Hair Oil Segment of the Hair Care Market in India on the Basis of Revenue in Percentage, 2011



BY SHAMPOO

The shampoo market in India has been dominated by HUL, with a contribution of around ~% in

“ The shampoo market in India has been dominated by HUL, with a contribution of around ~% in 2011. ”

India.

2011. The company wide product line in the shampoo segment and widespread distribution channels has sustained the growth of the company in the shampoo market in India. The company's brand such as Clinic Plus, Clear, Sunsilk and Dove has acquired a major share of the market across

Figure: Market Share of Major Players in the Shampoo Segment of the Hair Care Market in India on the Basis of Revenue in Percentage, 2011



INDIA NUTRACEUTICALS MARKET

COMPETITIVE LANDSCAPE OF MAJOR PLAYERS IN THE NUTRACEUTICALS MARKET IN INDIA, 2011

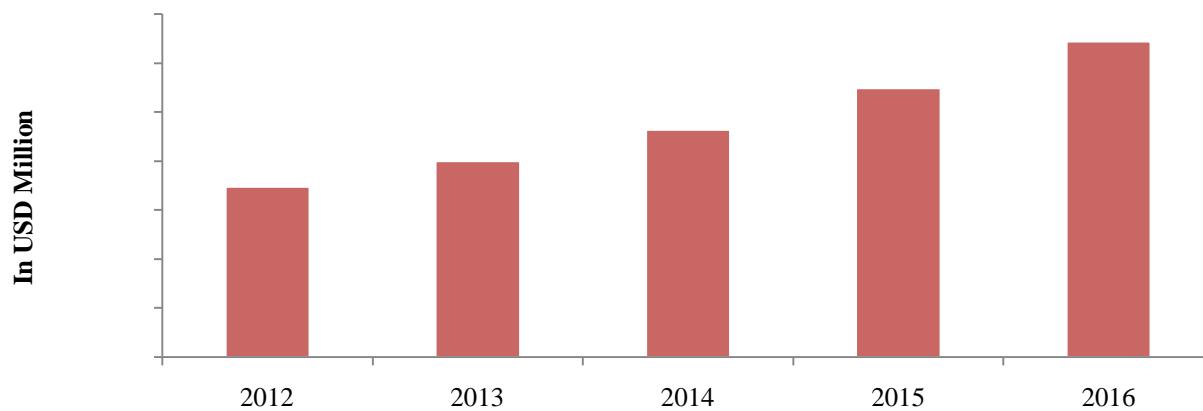
Table: Competitive Landscape of Major Players in the Nutraceuticals Market in India, 2011

Company	Business Overview	Segment Information and Brand Positioning	Financial Performance
Amway			
Dabur <i>Celebrate Life!</i>			
HERBALIFE.			

INDIA NUTRACEUTICALS INDUSTRY FUTURE OUTLOOK AND PROJECTIONS, 2012-2016

The future of the nutraceuticals market in India is expected to flourish in the long run given the growing awareness about health and wellness in the country especially amongst the population in the urban areas, which is probably due to the changing lifestyle of the urban middle class population... The nutraceuticals market in India in 2011 was around USD ~ million and is expected to be USD 3,216.6 million by 2016...

Figure: India Nutraceuticals Market Projections on the Basis of Revenue in USD Million, 2012-2016



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