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Table 33: Malaysia Hand Care Market Value (USD m) and Growth (Y-o-Y), 2007–17

Table 32: Malaysia Hand Care Market Value (USD m) and Growth (Y-o-Y), 2007–17

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Table 27: Malaysia Hand Care Market Value (USD m) and Growth (Y-o-Y), 2007–17

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Table 17: Malaysia Hand Care Market Value (USD m) and Growth (Y-o-Y), 2007–17

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Table 14: Malaysia Hand Care Market Value (USD m) and Growth (Y-o-Y), 2007–17

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1. **Introduction**

1.1 **What is this Report About?**

This report is the result of Canadean's extensive market research covering the Skincare Market in Malaysia. It provides detailed segmentation of historic and future Skincare Market, covering key categories and segments.

As such the report is an essential tool for companies active across the Skincare industry and for new players considering entry into Malaysia's Skincare market.

1.2 **Definitions**

All the data is collected in volume terms. Skincare Market refers to domestic Market only and includes imports. Please note that rounding errors may occur.

1.2.1 This report provides 2012 actual sales; while forecasts are provided for 2013 – 2017

1.2.2 **Category Definitions**

<table>
<thead>
<tr>
<th>Category</th>
<th>Segment</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Body Care</td>
<td>Mass Body Care</td>
<td>Widely distributed body care creams, lotions and milks. Includes anti-cellulite and foot care preparations. Examples include Caress Shimmering Body Lotion (US), L’Oreal Body Expertise Nutrisoft 24H Body Milk (Austria), Nivea Body Whitening Body Lotion (Indonesia).</td>
</tr>
<tr>
<td>Premium Body Care</td>
<td>Body care creams, lotions and milks that generally carry a brand name of a prestigious fragrance house. They are sold at a premium price and are marketed towards the top-end of the market where luxury and exclusivity are emphasized. Includes anti-cellulite and foot care preparations Examples include Forever Elizabeth Body Lotion (US), Miami Glow By J-Lo Body Lotion (Switzerland), Gucci Envy Me Body Lotion (China).</td>
<td></td>
</tr>
<tr>
<td>Depilatories</td>
<td>Chemical</td>
<td>All chemical hair removal products sold for domestic use. Does not include razors or waxing strips. Examples include Nair Quick And Simple 15 Second Microwave Wax (US), Veet Hair Removal Mousse (UK), New Etiquette Depilatory Wax (Japan).</td>
</tr>
<tr>
<td>Wax Strips &amp; Wax</td>
<td>Depilatories</td>
<td>Includes depilatory wax strips &amp; waxes (including roll-ons) for use at home. E.g., Veet® Wax Strips with Easy Grip, Sally Hansen, etc. It excludes electric hair removers, electrical home-waxing kits and related products.</td>
</tr>
<tr>
<td>Facial Care</td>
<td>Anti-Agers</td>
<td>Anti-aging creams are predominantly moisturiser based cosmeceutical skin care products marketed with the promise of making the consumer look younger by reducing visible wrinkles, expression lines, blemishes, pigmentation changes, discoulourations and other environmentally (especially from the sun) related conditions of the skin. Examples include L’Oreal Dermo-Expertise Line Eraser Night For All Skin Types (US), Sanoflore Cosmetique Bio Anti-Ageing Cream (France), Shiseido Benefiance Wrinkle Lifting Concentrate (Japan).</td>
</tr>
<tr>
<td>Cleansing Wipes</td>
<td></td>
<td>Wet textile products used to clean the face without the need for soap or water. Does not include baby wipes. Examples include Cottonelle Fresh Folded Wipes (US), Nivea Visage Soft Cleansing Wipes (Denmark), Biore Cleansing Cotton (China).</td>
</tr>
</tbody>
</table>
## Table 1: Category Definitions - Skincare Market

<table>
<thead>
<tr>
<th>Category</th>
<th>Segment</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exfoliating Scrubs</td>
<td></td>
<td>Products containing granules that remove upper layers of dead skin cells. Includes dedicated facial scrubs only, but not those designed to clear spots. Examples include Biore Pore Perfect Pore Unclogging Scrub (US), Clean Skin Face Olive Mild Face Scrub (Greece), Fair &amp; Lovely Perfect Radiance Gentle Exfoliating Facial Wash (India).</td>
</tr>
<tr>
<td>Face Mask</td>
<td></td>
<td>Also known as 'face masque'. Cleansing cream that is applied, left on until it dries, and then removed. Examples include Neutrogena Hydrating Facial Cloth Mask (US), Estee Lauder Stress Relief Face Wash (Europe), Clear Turn Uruoi Essence Mask (Japan).</td>
</tr>
<tr>
<td>Facial Creams and Gels</td>
<td></td>
<td>Cleansing creams and gels marketed exclusively for use on the face. Does not include liquid soaps and medicated cleansers that to clear spots. Examples include Cetaphil Daily Facial Moisturizer With SPF 15/AM (US), Witch Tingly Clean Gel Face Wash (UK), Ayur Face Gel (India).</td>
</tr>
<tr>
<td>Fade Cream</td>
<td></td>
<td>Cream designed to remove the appearance of scars and blemishes. Contains bleaching agents (in the USA, hydroquinone). Examples include Mederna Skin Care For Scars (US), Mebo Scar Lotion (UK), Smooth Erase Pore And Acne Scar Concealer.</td>
</tr>
<tr>
<td>Night Cream</td>
<td></td>
<td>Night Cream- A moisturizer in which there is a greater concentration of hydrating ingredients than typically used in day creams. It is formulated to be applied before going to bed. Examples include Dove Sensitive Essentials Night Cream (US), Garnier Total Comfort Night Cream (France), Dove Face Care Essential Nutrients Moisturizing Night Cream (Australia).</td>
</tr>
<tr>
<td>Other Moisturizers</td>
<td></td>
<td>Creams that hydrate, seal and protect the skin. Does not include products defined elsewhere within this category. Includes eye gel. Examples include RoC Portient Actif Pur Eye Contour Gel (US), Shiseido Eye Soother Anti-Dark Circles Anti-Puffness Gel (Italy), Garnier Synergie Fresh Soothing Under Eye Gel (India).</td>
</tr>
<tr>
<td>Pore Strips</td>
<td></td>
<td>Pore strips are a type of skin care product designed to remove clogs from pores caused by oil buildup. Similar to wax strips, they are applied directly to the skin and employ adhesive technologies to bind dirt and oil to the strips, which are then peeled away. Examples include Pond's Clear Pore Strips Nose (US), Clean &amp; Clear Pore Clearing Nose Strips (Germany), Pond's Clear Pore Strips (Australia).</td>
</tr>
<tr>
<td>Toner</td>
<td></td>
<td>Toner- Product used after cleansing to help return skin to its natural pH. Removes any remaining trace of dirt or debris. Liquids applied to the skin using a cotton pad after cleansing, to remove traces of other cleansing products. Examples include Olay Refreshing Toner (US), Evian Affinity Facial Toner (France), L'Oreal Paris Dermo-Expertise Visible Results Gelified Toner (Australia).</td>
</tr>
<tr>
<td>Hand Care</td>
<td>Mass Hand Care</td>
<td>Widely distributed hand care creams, lotions and milks. Does not include general body care products that can also be used on the hands. Examples include Corn Huskers Heavy Duty Hand Treatment Lotion (US), Neutrogena Norwegian Formula Hand Cream (Greece), Vaseline Hand &amp; Body Lotion (South Korea).</td>
</tr>
<tr>
<td>Premium Hand Care</td>
<td></td>
<td>Hand care creams, lotions and milks that generally carry a brand name of a prestigious fragrance house. They are sold at a premium price and are marketed towards the top-end of the market where luxury and exclusivity are emphasized. Does not include general body care products that can also be used on the hands. Examples include Clinique Water Therapy Moisture Glove Hand Cream (US), Malabah Hand Cream (UK), Estee Lauder Re-Nutriv Ultimate Lifting Hand Crème SPF 15 (Japan).</td>
</tr>
<tr>
<td>Make-Up Remover</td>
<td>Eye Make-Up Remover</td>
<td>Cleansing cream, gel or liquid designed to provide minimal irritation to the eyes when removing eye make-up. Examples include Almay Hyp-Allergenic Dual-Phase Eye Makeup Remover (US), Christian Dior Duo-Phase Eye Makeup Remover (Belgium), Close Tear Eye Makeup Remover (Japan).</td>
</tr>
<tr>
<td>Face Make-Up Remover</td>
<td></td>
<td>Make-up removal products designed for removing face make-up, including products designed for eye and face use. Includes pads, towels, creams, gels and liquids. Examples include N.Y.C. New York Color Gel Makeup Remover (US), Ahava Advanced Make-Up Remover (UK), Virgin Cleansing Makeup Remover (Japan).</td>
</tr>
</tbody>
</table>
Table 1: Category Definitions - Skincare Market

<table>
<thead>
<tr>
<th>Category</th>
<th>Segment</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nail Varnish Remover</td>
<td></td>
<td>All chemical products designed and marketed for the removal of nail polish. Includes liquids, pads and sticks. Examples include Cutex Quick &amp; Gentle Non-Acetone Nail Polish Remover (US), Cutex Extra Caring Gel Nail Polish Remover (UK), Za Nail Color Remover (Taiwan).</td>
</tr>
</tbody>
</table>

Source: Canadean

1.2.3 Distribution Channel Definitions

Table 2: Distribution Channel Definitions - Skincare Market

<table>
<thead>
<tr>
<th>Distribution Channel</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash &amp; carries &amp; warehouse clubs</td>
<td>Cash &amp; carries sell from a wholesale warehouse to customers (small retailers, professional users) who pay on the spot and transport goods away themselves. Warehouse clubs are no-frills stores that sell discounted goods to members who pay an annual fee. Delivered wholesale sales are not included. In our data only sales from these stores direct to the public (for example through work place deals allowing otherwise regular consumers to shop there) are covered. Example: Makro, Metro, Costco, Sams Club</td>
</tr>
<tr>
<td>Discount, variety store &amp; general merchandise retailers (Dollar Stores)</td>
<td>Dollar Stores, Variety Stores &amp; General Merchandise Retailers - A variety store or price-point retailer (including Dollar stores) is a retail store that sells inexpensive items, often with a single price for all items in the store, or a general low price policy. Typical merchandise includes cleaning supplies, toys, household goods and gardening equipment, basic foods and beverages. A general store, general merchandise store, or small town store carries a (broad) general line of merchandise, often in a medium (and sometimes small) store format, serving the needs of either the surrounding town or rural area. They differ from convenience stores or corner shops in that it will be the main shop for the community rather than a convenient supplement and typically carries a broader product line. Example: 9 to 9 Dollar Shop.</td>
</tr>
<tr>
<td>Convenience stores &amp; gas stations (Convenience stores)</td>
<td>Convenience Stores - Includes all sales through stores of an area generally less than 300 sq m, that specialize in a limited range of food &amp; grocery products designed primarily for consumers with top-up shopping needs. Also includes sales in retail outlets attached to gas stations, where fuel is the main revenue driver, kiosks, and newsstands. This also includes small independent retailers, particularly those present in countries such as China and India.</td>
</tr>
<tr>
<td>Department stores (Department stores)</td>
<td>Department Stores - Includes all sales through multi-category retailers, focusing primarily on non-grocery categories with distinct departments specializing in defined product areas. Examples include Bloomingdale’s, Macy’s, John Lewis and El Corte Ingles.</td>
</tr>
<tr>
<td>Hypermarkets &amp; supermarkets (Hyper/ Super Markets)</td>
<td>Hypermarkets &amp; Supermarkets (incl. discounters) - Hypermarkets/mass merchandisers include all sales through retailers with floor area over 2,500 sq m that carry full lines of both grocery and general merchandise (e.g. Walmart). Supermarkets include all sales through retailers with a floor area of 300 sq m -2,500 sq m that offer a wide, departmentalized range of groceries, and may carry some general merchandise lines (e.g. Sainsbury’s, Kroger). It also includes hard grocery discounters such as Walmart.</td>
</tr>
<tr>
<td>Vending machines (Vending machines)</td>
<td>Vending machines - Includes paid-for sales from all vending machines not located within a store (e.g. public places, workplaces, pubs &amp; Bars).</td>
</tr>
<tr>
<td>Drug stores &amp; Pharmacies (Pharmacies)</td>
<td>Drug stores &amp; Pharmacies - Stores licensed to dispense prescription (Rx) and over-the-counter (OTC) healthcare products and where these sales account for the majority of revenues. Also known as Drug store and Health store. This channel does not include supermarkets with pharmacy counters. Example: Metro and Apollo pharmacies in India.</td>
</tr>
<tr>
<td>Food &amp; drinks specialists (Food &amp; drinks specialists)</td>
<td>Food &amp; drinks specialists - Includes bakers, butchers, delicatessens, drinks specialists, fishmongers, greengrocers, Food &amp; drinks only stores, and single category stores (e.g. stores selling only cheese, or only olives, or only honey, or only Confectionery products) Example: Amul Dairy shops in India.</td>
</tr>
</tbody>
</table>
Table 2: Distribution Channel Definitions - Skincare Market

<table>
<thead>
<tr>
<th>Distribution Channel</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>eRetailers (eRetailers)</td>
<td>eRetailers - Includes all sales that take place over the internet, irrespective of whether the vendor is a pure-play internet company or the online offering of a physical retailer. Example: Amazon, SPAR and FutureBazaar.com in India.</td>
</tr>
<tr>
<td>Health &amp; Beauty Stores</td>
<td>Retailers that generate the majority of their revenue through a specific product type. In the personal care market, this includes specialist stores other than drugstores. Example: Boots in UK, Himalaya in India.</td>
</tr>
<tr>
<td>Other general retailers (Others)</td>
<td>Others - Includes other generalist retail channels not included in the categories above (e.g. market traders, charity stores, student union stores, direct sales, and Duty Free shops).</td>
</tr>
</tbody>
</table>

Source: Canadean

1.2.4 Volume Units and Aggregations

Table 3: Volume Units for Skincare Market

<table>
<thead>
<tr>
<th>Category</th>
<th>Segment</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skincare</td>
<td>Body Care</td>
<td>Units m</td>
</tr>
<tr>
<td></td>
<td>Depilatories</td>
<td>Units m</td>
</tr>
<tr>
<td></td>
<td>Facial Care</td>
<td>Units m</td>
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<tr>
<td></td>
<td>Hand Care</td>
<td>Units m</td>
</tr>
<tr>
<td></td>
<td>Make-Up Remover</td>
<td>Units m</td>
</tr>
</tbody>
</table>

Source: Canadean

1.2.5 CAGR Definition and Calculation

Compound Annual Growth Rate (CAGR) is the year-over-year growth rate of a value over a specified period of time.

For this report, CAGR for historic time period is Calculated from 2007-2012, as

\[ CAGR = \left( \frac{2012 \text{ Value}}{2007 \text{ Value}} \right)^{\frac{1}{2012 - 2007}} - 1 \]

CAGR for forecast time period is Calculated from 2012-2017, as

\[ CAGR = \left( \frac{2017 \text{ Value}}{2012 \text{ Value}} \right)^{\frac{1}{2017 - 2012}} - 1 \]

For Brand Analysis and Distribution Channel Analysis, CAGR is Calculated from 2009-2012, as

\[ CAGR = \left( \frac{2012 \text{ Value}}{2009 \text{ Value}} \right)^{\frac{1}{2012 - 2009}} - 1 \]
1.2.6 Graphical representation of Brands

Top 10 brands are considered for each category in the market subject to availability of such data. Brand analysis charts are displayed only for categories where data is available for more than two brands.

1.2.7 Exchange Rates

All research is conducted in local currency in nominal prices. US dollar conversions for all historic data and for the latest year of actual data (2012 in this report) are made using an annual average exchange rate. For details please refer to table below. As we do not forecast exchange rates, the forecast data (from 2013 to 2017) is converted using a fixed 2012 exchange rate. As a result, annual growth rates for historic data will differ between local currencies and US dollar conversions, whereas they will be the same for forecasts.

| Table 4: Malaysia Exchange Rate LCU (Local Currency Unit) – USD (Annual Average), 2007 – 2012 |
|---------------------------------|---------|---------|---------|---------|---------|---------|
| Currency | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
| LCU – USD | xxxx | xxxx | xxxx | xxxx | xxxx | xxxx |

Source: Canadean

1.2.8 Methodology Summary

In order to create the data for all the reports in this series and ensure its robustness, a comprehensive and empirically robust research methodology has been adopted. This combines both a large-scale program of industry research with the results of extensive primary industry interviewing and calling. Furthermore, all definitions are standardized across products and countries to ensure comparability.

The two main research methods, secondary research and primary research (the program of interviewing industry contacts), are brought together and because both sets of research processes have been designed in conjunction with each other they can be combined and consolidated into the final, integrated data sets.

The secondary research process involves covering publicly available sources, trade associations, specialist databases, company annual reports, and industry publications. While primary research involves a major program of interviewing leading industry executives for each category covered in each country – all with local country experts; typically brand, product and marketing managers for major brands within each country. These processes help analysts in capturing both qualitative and quantitative information about the market.

The final stage of the process is the triangulation of inputs obtained from all the research methods with the analyst’s own understanding of the market in order to finalize the data. Once the data is finalized, it goes through various top level quality checks prior to publishing.

2.1 Skincare Value Analysis, 2007–17

2.1.1 Overall Skincare Market Value, 2007–17

<table>
<thead>
<tr>
<th>Table 5: Malaysia Skincare Market Value (LCU m) and Growth (Y-o-Y), 2007–17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Value</td>
</tr>
<tr>
<td>Y-o-Y growth</td>
</tr>
<tr>
<td>Source: Canadean © Canadean</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Table 6: Malaysia Skincare Market Value (USD m) and Growth (Y-o-Y), 2007–17</th>
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<tbody>
<tr>
<td>Market Value</td>
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<tr>
<td>Y-o-Y growth</td>
</tr>
<tr>
<td>Source: Canadean © Canadean</td>
</tr>
</tbody>
</table>

Figure 1: Malaysia Skincare Market Value (LCU m) and Growth (Y-o-Y), 2007–17

Source: Canadean © Canadean
## 2.1.2 Skincare Market Value by Category, 2007–17

### Table 7: Malaysia Skincare Market Value (LCU m) by Category, 2007–12

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<thead>
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<td>Body Care</td>
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<td>Depilatories</td>
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<td>Facial Care</td>
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<td>Hand Care</td>
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<tr>
<td>Make-Up Remover</td>
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<td>Overall</td>
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</tbody>
</table>

Source: Canadean © Canadean

### Table 8: Malaysia Skincare Market Value (LCU m) by Category, 2012–17

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<thead>
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</thead>
<tbody>
<tr>
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<tr>
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Source: Canadean © Canadean

### Table 9: Malaysia Skincare Market Value (USD m) by Category, 2007–12

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Source: Canadean © Canadean
### Table 10: Malaysia Skincare Market Value (USD m) by Category, 2012–17

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Source: Canadean

### Figure 2: Malaysia Skincare Market Value (LCU m) by Category, 2007–17

Source: Canadean
### 2.1.3 Market Growth Dynamics by Value – Skincare, 2007–17


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Source: Canadean © Canadean

**Figure 3: Malaysia Skincare Market Dynamics, by Category, by Market Value, 2007–17**

Source: Canadean © Canadean