

Global Beauty Care Market (2014-2018)



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1. Executive Summary

The beauty industry worldwide was negatively impacted by the 2009 recession, but recovered smartly in 2010 as the global economy improved marginally. It clocked revenues worth USD XX billion in 2013, which is anticipated to reach USD XX billion in 2018. The industry registered a steady Compound Annual Growth Rate (CAGR) of XX percent. The global beauty care market is classified into two sub segments - premium products and mass products. In 2010, the mass segment comprised over XX percent, while the premium segment accounted for nearly XX percent of the global beauty care market's total sales.

The skin care segment accounts for the major chunk of the global cosmetic care industry's revenue; it is expected to generate a CAGR of XX percent through 2013-2018. Facial care segment is the largest segment in the skin care domain, with more than XX percent of the overall market share. Geographically, Asia-Pacific alone accounts for nearly XX percent of the global revenue generated from skin care. China was a standout performer in the region. Emerging markets such as the Brazil, Russia, India and China (BRIC) countries have also experienced robust growth in recent years. Eastern Europe was the second fastest growing region, with Russia accounting for the lion's share.

The global hair care market registered gross revenues worth USD XX billion in 2013, with a CAGR of XX percent through 2014-2018. It is projected to reach XX billion by 2018. The market consumption of global hair care products registered a CAGR of XX percent from 2009-2013, to reach a total of XX billion units in 2013.

The revival of the global economy has seen a rise in disposable income among consumers, both in the developed and the emerging markets. This has resulted in robust growth of the hair care market. Further, the young generation is becoming more fashion conscious and many are turning to hair styling products and hair colours to express their individuality. Changes such as increase in consumer spending, especially among youth, is one of the key driving forces stimulating the growth of the industry.



2. Global Beauty Care Market

In the last two decades, the global beauty care market registered a steady CAGR of XX percent, with the average annual growth rate hovering between XX and XX percent. Commonly known as Cosmetics and Toiletries or Personal Care Products, the sector has proven its ability to achieve stable and continuous growth as well as its capacity for resilience in unfavorable economic conditions.

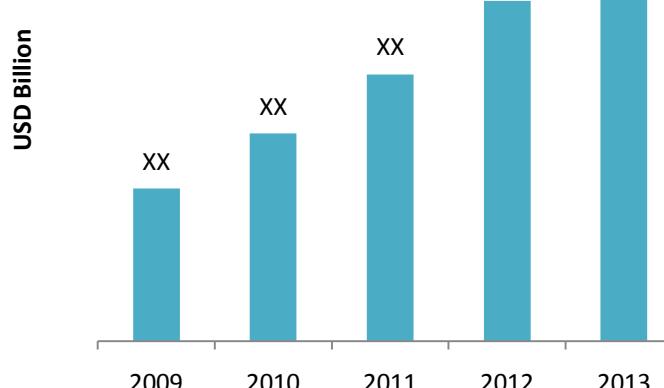
The global beauty care market was valued at USD XX billion in 2013. At a CAGR of XX percent through 2014-2018, the industry is anticipated to touch USD XX billion in 2018.

The global beauty care market is primarily subdivided into three major categories: Hair care, Skin care and Cosmetic care. Although each segment is complimentary to one another, there is considerable diversity within the categories as they cater to different consumer needs and expectations.

The market can be further classified into premium and mass production segments, based on brand prestige, pricing and the distribution channel used. In 2010, the mass segment of the global beauty care

Chart 1

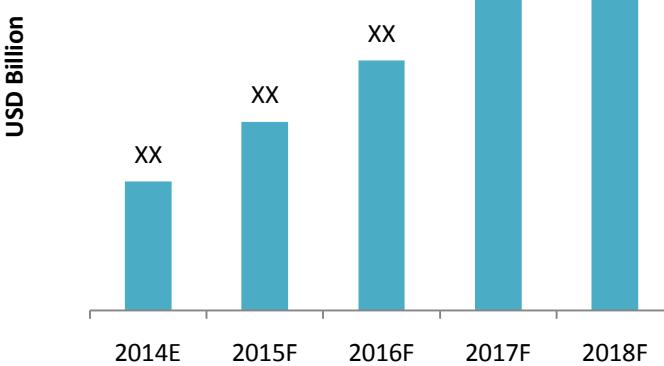
Global Beauty Care Market



Source:

Chart 2

Outlook - Global Beauty Care Market



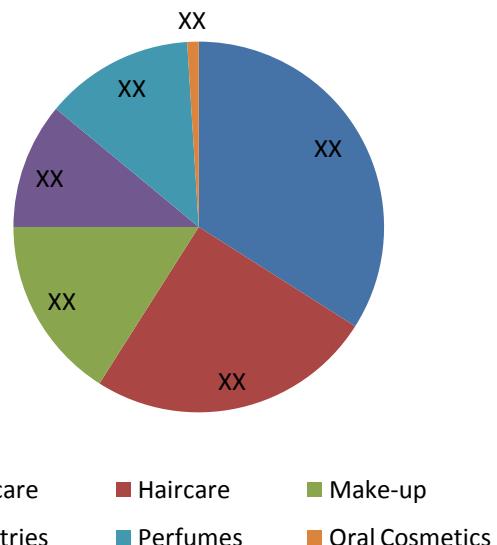
Source:



market comprised more than XX percent, while the premium segment accounted for nearly XX percent of total sales. Recent trends indicate that the sale of premium products is steadily on the rise in key emerging markets. The bulk of global premium cosmetics sales is concentrated in the developed markets such as the USA, Japan and France.

Chart 3

Segments of Beauty Care Market



Source:



4. Global Skin Care Market

The skin care sector expanded by nearly XX percent in 2010, to register revenues worth USD XX billion. According to Euromonitor International, it generated revenues of USD XX billion in 2013. With a CAGR of XX percent through 2013-2018, the sector is predicted to accrue revenues worth USD XX billion in 2018. The Facial care segment accounted for the major share of the market pie, accounting for more than XX percent.

The global skin care industry has experienced a shift in demand as young consumers have become the major contributors to the industry's revenue. According to analysts, consumers are using skin care products at a younger age in a bid to delay the signs of aging, while the contribution of older consumers is gradually on the decline. Skin care companies may adapt their marketing strategies to correct this balance and hold on to their older consumer base.

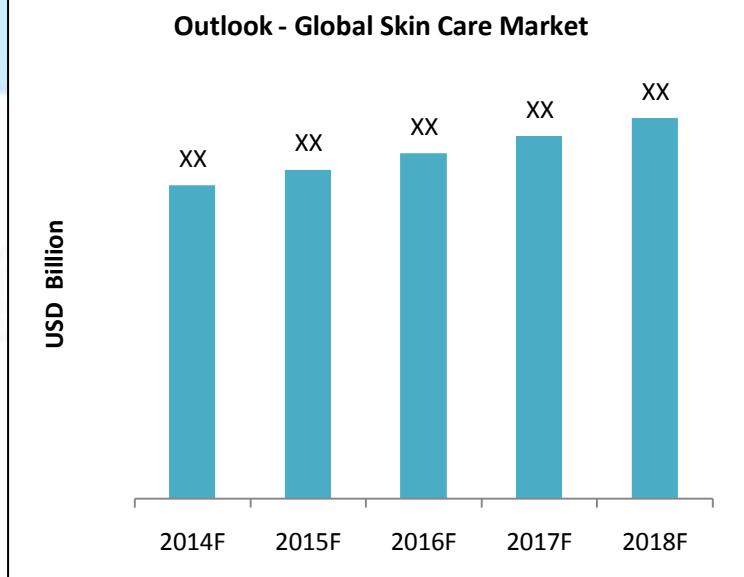
The world anti-aging products market is anticipated to be USD XX billion in 2018, according to global industry analysts. This market especially is expected to benefit from high disposable incomes. A case in point is that anti-aging product sales have remained unaffected during recessions. Consumers

Chart 4



Source:

Chart 5



Source:



continue to buy such products despite the unfavorable economic climate, although they may opt for cheaper products. In the near future, consumers will demand more value for money, with functional and visual benefits proving a high priority for choosing anti-aging products.

The global sun care market is projected to generate revenues worth USD XX billion; it has grown by nearly XX percent in the last five years. The consumption of sun care products is expected to be over XX billion units, globally. The European Union (EU) accounts for XX percent share in the overall global sun care market in terms of value.

Emerging markets such as the BRIC countries have experienced robust growth in recent years. Economic growth in these countries has taken people above the poverty level to move into the middle class. A rise in the number of middle class people, with high consumption propensity, has provided a stimulus for the global skin care market. Rise in the demand for premium quality products in the BRIC nations is complemented with high growth rates for skin care products. Latin America was the leading skin care market during till 2011, with Brazil being the major contributor for the sales revenue in the region.



5. Global Cosmetic Care Market

Chart 6

Global Cosmetic Care Market

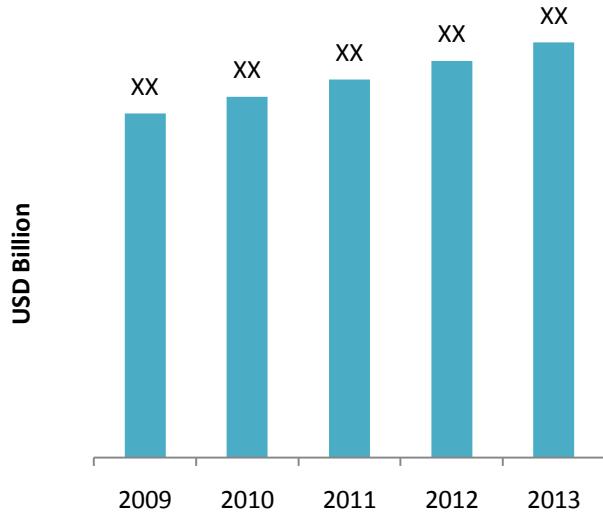
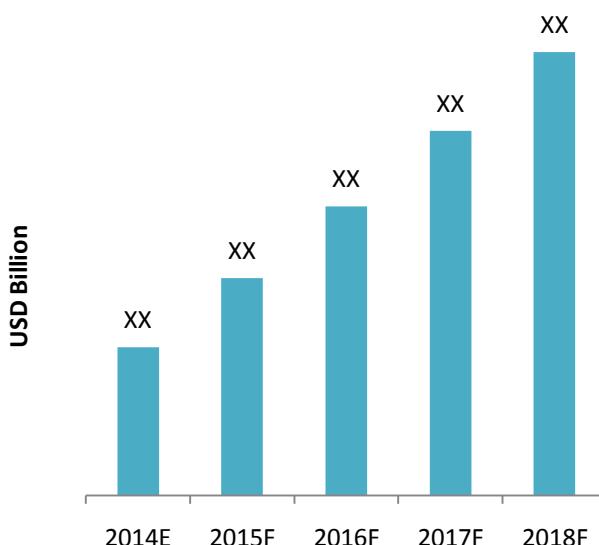


Chart 9

Outlook - Global Cosmetic Care Market



Source:



6. Beauty Care Market in the USA

Despite the onset of lull economic period in 2012, the global beauty industry is nearing USD XX billion in 2014. Across the world, revenue generated from mass cosmetics is steadily on the rise and the premium cosmetic segment is experiencing robust growth.

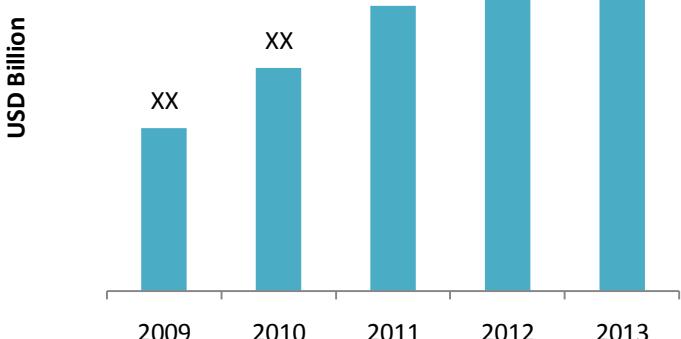
The US beauty care market in 2012 grew at the second highest rate during 2007-2012 period and accrued revenue worth USD XX billion in 2013. With a CAGR of XX percent through 2014-2018, the market is projected to reach USD XX billion in 2018.

In the aftermath of America's economic recession, many consumers are looking for value bargains. This has prompted manufacturers to innovate beauty care products. Items that claim to offer multiple benefits and can consolidate the consumer's staple beauty care needs are often preferred.

The beauty care market in the USA is expected to experience moderate growth in the near future. Economic recovery coupled with improvement in the job market would propel disposable incomes, thereby allowing consumers to shift towards premium and value-added products. An ageing population

Chart 12

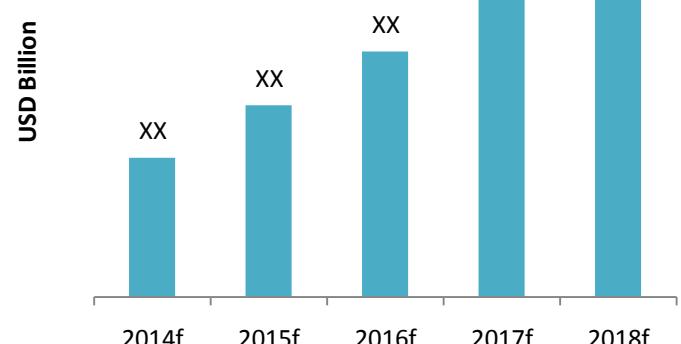
Hair care Market in USA



Source:

Chart 11

Outlook - Beauty Care Market - USA



Source:

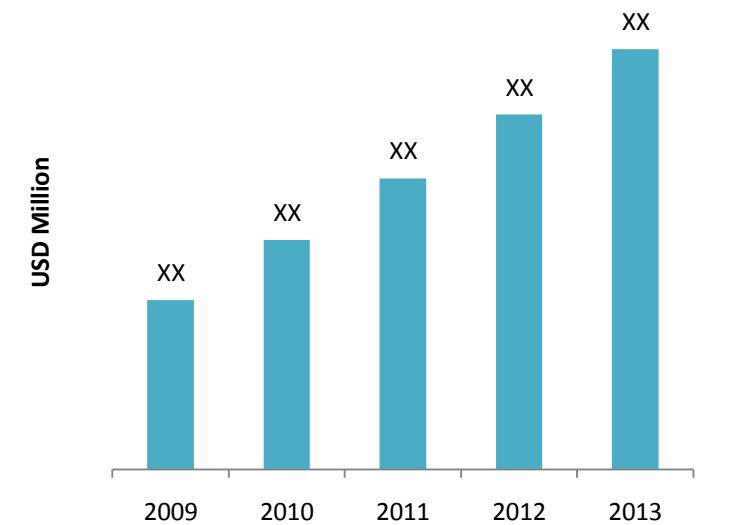


will also become more prominent, escalating growth in areas that offer products to older generations, such as hair care, dental care and skin care. That the wellness trend has been well accepted by US consumers is evident from the XX percent growth in the wellness industry during 2008-2013.

The recovery of the US economy and a rising stock market also led to higher consumer confidence among high-income consumers. Affluent Americans are driving the revenue growth of the skin care market. From 2011-2013, demand for premium skin care products significantly stimulated the growth of the skin care market.

Chart 14

Skin Care Market in USA



Source:



10. Beauty Care Market in India

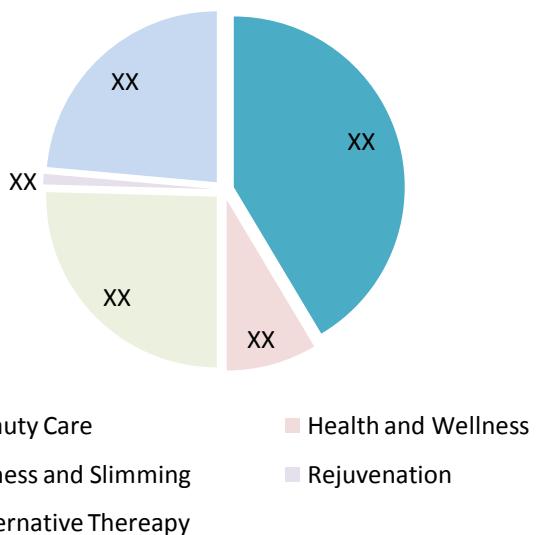
India's wellness industry is divided into five key segments, with beauty care contributing the lion's share, followed closely by fitness and slimming and the 'alternative' segments.

Consumer spend on beauty care products continues to be strong, especially hair and skincare products. Exponential growth of organised salons is responsible for this trend. Enhancement through cosmetic surgery is also gaining acceptance.

Fitness services contribute nearly 50 percent to India's fitness and slimming segment. Driven by urban consumers, slimming products have grown considerably over the last one year. Wider availability and greater acceptance of these products among the youth is responsible for the segment's growth - estimated at 35-40 percent, annually.

Chart 27

Market Segments - Indian Wellness Industry



Source:

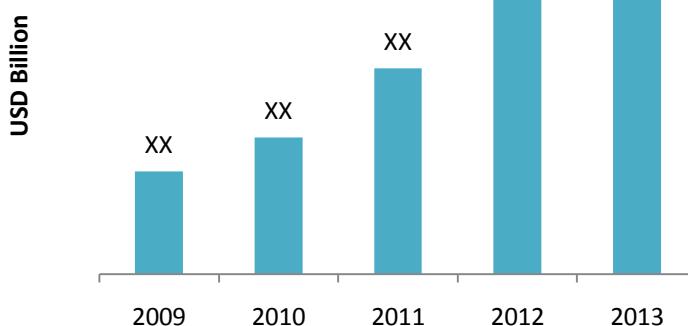


Beauty care products constitute the largest market share in the Indian wellness industry. Rise in disposable income and exposure to global brands have led to the growth of the market. Consumers are now willing to spend considerable amounts on reputed international brands and branded domestic products.

The Indian beauty care market was estimated at USD XX billion in 2013. With a CAGR of XX percent through 2014-2018, the market is anticipated to reach USD XX billion in 2018. The invasion of international channels, the influence of the Bollywood film industry and several other linked factors have contributed to this growing interest in self-grooming.

Chart 28

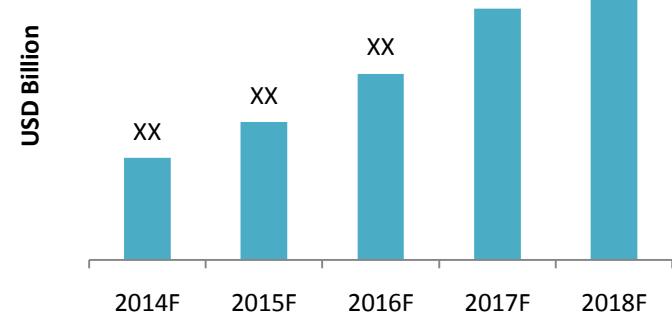
Beauty Care Market in India



Source:

Chart 29

Outlook - Beauty Care Market in India



Source:



13. Outlook

Rise in real income and changing lifestyle would be the key driver of the global beauty care market. The BRIC nation along with other developing economic offer immense growth potential of the industry in the near future. The developed market is in need of innovation as industry experts consider such markets to be saturated.

The Latin American market currently offers huge growth potential and cosmetic companies have shifted their focus to the mass market primarily dominated by the hair care and fragrance segment. Companies are actively looking for product diversification and new products at lower price levels. The introduction of mass products in mature markets traditionally dominated by premium products is also a recent development. Although the global beauty care market is dominated by mass products in terms of sales volume, innovation is thick and fast in the premium segment. Two defining trends have been noticed in recent product innovations are - time saving products and long lasting products. The time-saving products are targeted at today's busy consumer who usually looks to limit the time spent on daily beauty care routine. Extensive research is done for before launching products such as quick drying nail polish or multi dimension products like the 3-in-1 shower gel or facial wash with shaving foam. Long lasting products (makeup remover and haircare products) are perceived to offer a substantial price-value ratio and can be used periodically as compared to conventional products.

The sale of cosmetic products over the internet has been a major trigger in generating revenue in the global beauty care industry. E-commerce outlets, with diversified product baskets, have been expanding all around the world. Often these websites explain the specifics of the different products.

The market share of the non-store retailing channel is increasing steadily. The new retail channels comprise direct selling and sale over the internet. Companies are focusing on direct selling mechanisms especially in emerging markets such as Brazil and China. According to industry experts, the global online sale of beauty care products accounted for nearly XX percent in 2012, and in South Korea, France and the United States, online sales generated nearly XX percent of the sales revenue. It is anticipated that in the coming years online cosmetics sales will soar even higher; the North American online beauty market alone will grow at a CAGR of XX percent through 2014-2018.

There has been a significant growth in the share of sales in hypermarkets and supermarkets especially in the developing markets of Eastern Europe and China. Hypermarkets are designing internal beauty shops,



which resemble specialized drug stores, in order to cater to customers especially interested in beauty care. The internal store has expertise which includes professional advice and a wide range of assistance in choosing products based on individual needs like that in a drug store.

Recent trends indicate that the demand for cosmetic and beauty care products is anticipated to grow, backed by demands from markets in Asia and Latin America. The rise in demand from these regions could also lead to the development of new products, changes in consumer spending patterns and even establish new beauty canons. Global beauty care product manufacturers would look to differentiate their products in order to cater to a large customer base, primarily from non-Western cultures.

Within the beauty care market, the skin care segment offers the biggest growth potential and would remain the flagship segment in the next few years. The deciding factor for the development of the market would be mass cosmetics sale, which would set the tone for the entire market. Growing awareness of mass cosmetics being at par with the premium products would stimulate the growth of the 'masstige' segment. The distribution structure is changing as well, as supermarkets and hypermarkets and e-commerce increase their shares in the overall market. New product launches are increasingly based upon advanced research and technologies. Simultaneously, there is increasing demand for organic products, produced in a sustainable way.



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