

Cosmetics Markets in 5 ASEAN Countries: Key Research Findings 2015

◆ **Research Outline**

Yano Research Institute has conducted a study on the cosmetics market in the 5 ASEAN countries with the following conditions:

1. Research period: May to September, 2015
2. Research target: Manufacturers, retailers of cosmetics and industrial organizations.
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone/email, over-the-counter survey, and literature research.

<What are Cosmetics Markets in Leading 5 ASEAN Countries?>

The leading 5 ASEAN countries in this research indicate Indonesia, Thailand, Philippines, Vietnam, and Malaysia. The targeted cosmetics items are categorized as follows: skincare products (skin lotion, milky lotion, moisture cream, etc.), make up products (foundation, lip sticks, eye-brows, etc.), hair-care products (shampoo, rinse, styling agents, etc.) and fragrance products (eau de colons, perfumes, etc.) Calculation of the market size is based on the yen-converted retail sales of cosmetics products in 5 ASEAN countries mentioned above.

◆ **Key Findings**

■ **Cosmetics Market Size in 5 ASEAN Countries in 2014 Attained 1,490.17 Billion Yen, 106.3% on Y-o-Y Basis**

Increase of population and expansion of consumer spending that stems from economic growth have driven the cosmetics market in the leading five ASEAN countries in 2014 to reach 1,490.17 billion yen, 106.3 % of the size of the year before.

■ **With Further Growth Expected by Rising Income, Cosmetics Market in 5 ASEAN Countries Likely to Face Fiercer Competition**

With growing population in both segments of middle-income and wealthy, the markets are projected to continue the rising tendency. In Indonesia, Philippines, Vietnam, and Thailand, the largest spending power seems to be the middle-income segment, whereas in Malaysia, the wealthy segment largely contributes in spending. In such a status, companies from Europe, U.S., Japan, and South Korea are all investing mainly in management resources of the five ASEAN nations, bringing about fiercer competitive environment.

◆ **Report format:**

Published report: "ASEAN Cosmetics Markets 2015"

Issued on: September 8, 2015

Language: Japanese

Format: 217 pages in A4 format

Price: 150,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

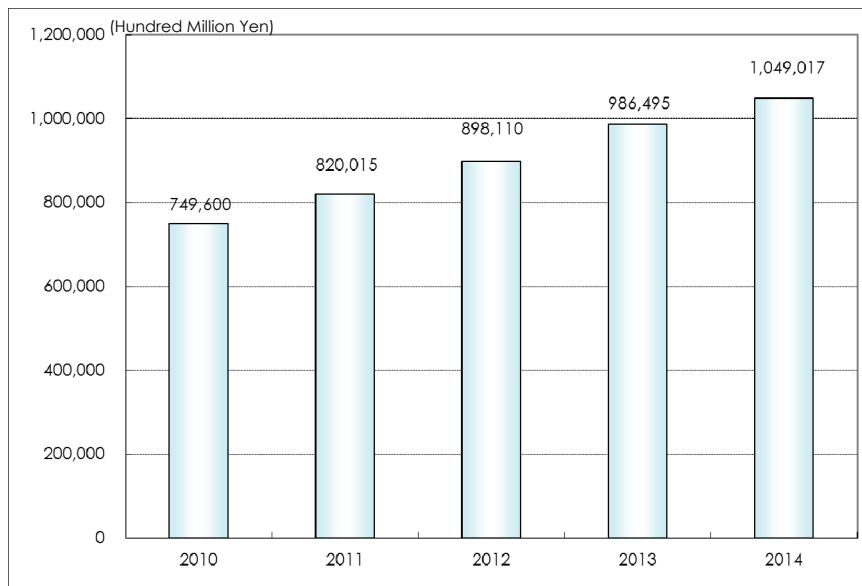
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■ **Figure 1: Transition of Size of Cosmetics Markets in 5 ASEAN Countries**

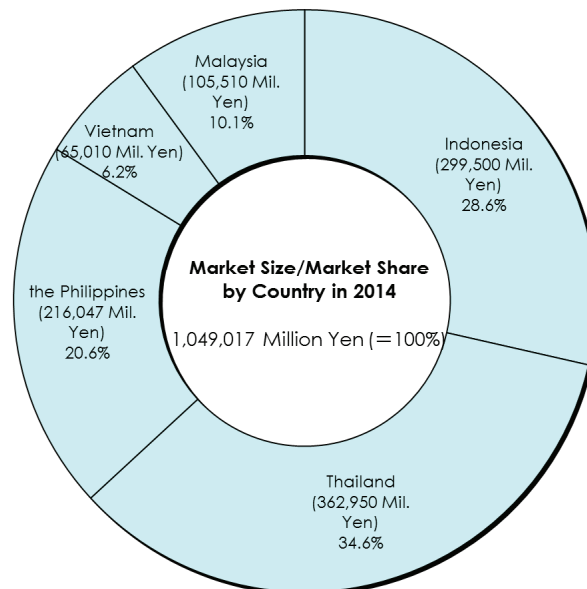


Estimated by Yano Research Institute

Notes:

1. The market size is based on retail values.
2. The market size is calculated based on the yen-converted retail sales of cosmetics markets in each 5 ASEAN countries (Indonesia, Thailand, Philippines, Vietnam, and Malaysia) with the following exchange rates:
 * Indonesia: 1 rupiah = 0.01 yen, Thailand: 1 baht = 3.4 yen, Philippines: 1 Philippine Peso = 2.6 yen, Vietnam: 10,000 dong = 55 yen, 1 linkit = 30 yen.

■ **Figure 2: Market Size/Market Share by Country in 2014**



Estimated by Yano Research Institute

Notes:

3. The market size is based on retail values.
4. The market size is calculated based on the yen-converted retail sales of cosmetics markets in each 5 ASEAN countries (Indonesia, Thailand, Philippines, Vietnam, and Malaysia) with the following exchange rates:
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