

7
MARÇ

OFICINES ACCIÓ

JORNADA:
OPORTUNITATS DE NEGOCI
PER AL SECTOR COSMÈTIC A
L'ÍNDIA

ORGANITZA:



COL·LABORA:



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Beauty and Personal Care Retail Sales by Region

Retail Value RSP - USD million - Constant - 2017

464.942

World

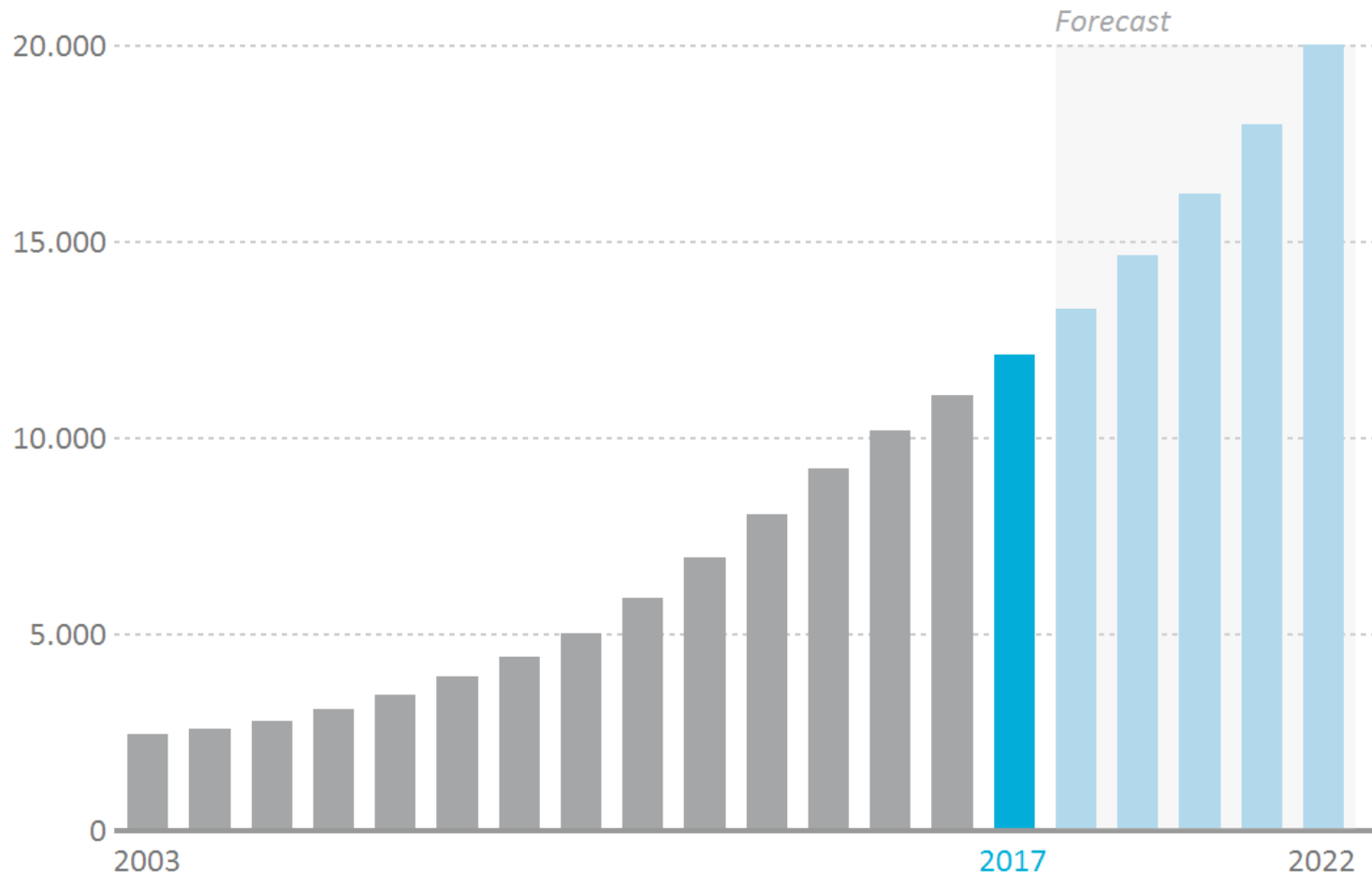




Sales of Beauty and Personal Care in India

Retail Value RSP - EUR million - Current - 2003-2022

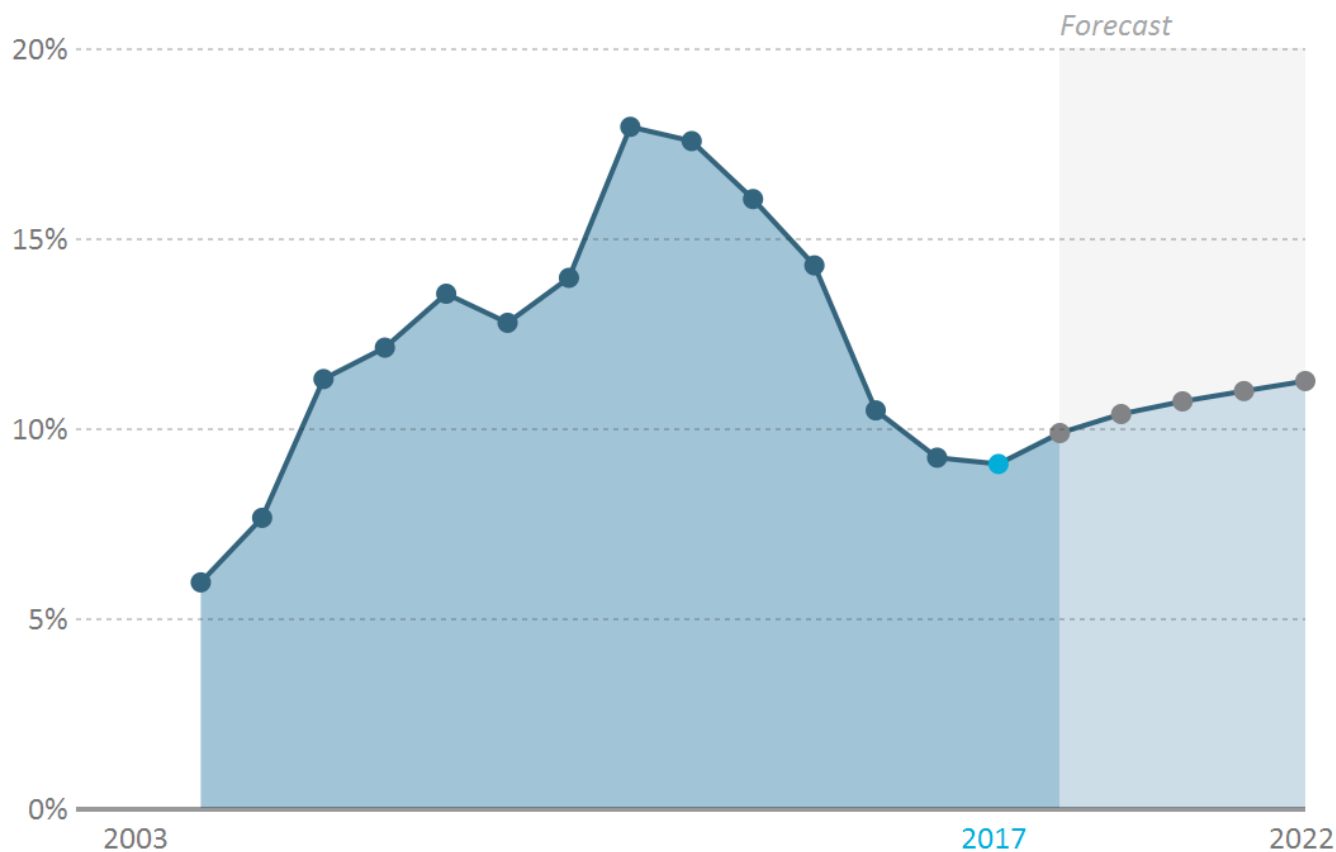
12.050



Sales Performance of Beauty and Personal Care in India

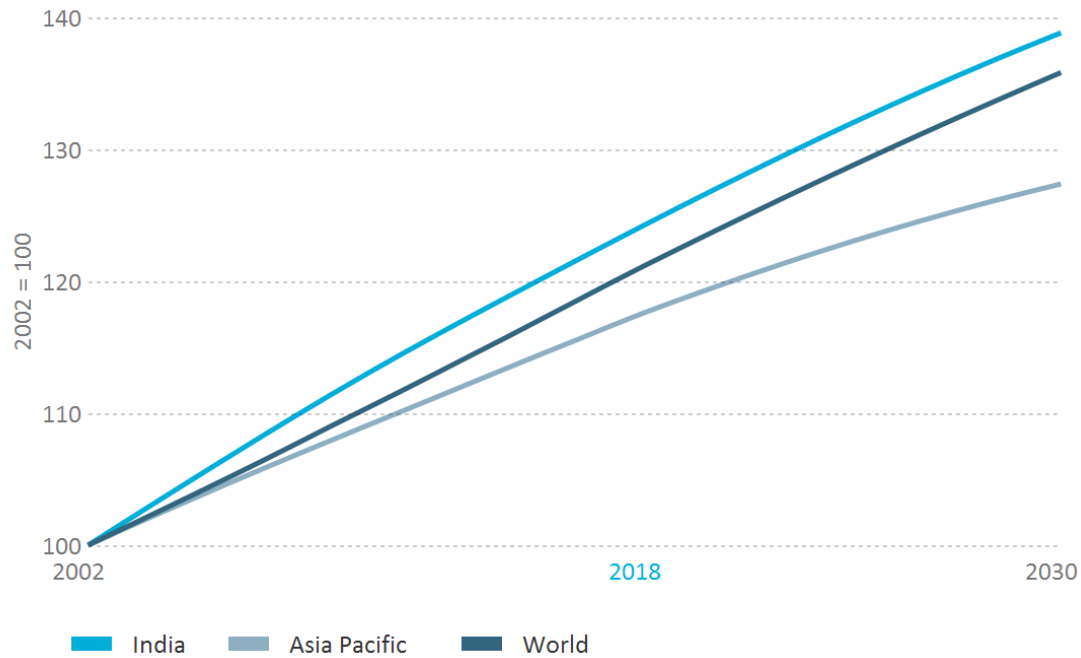
% Y-O-Y Retail Value RSP Growth 2003-2022

9.1%

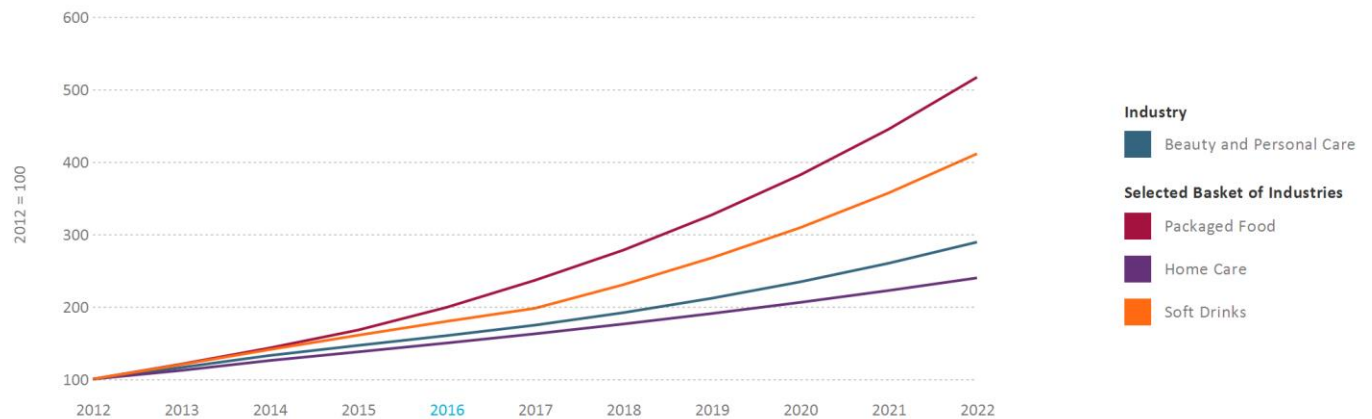


Population Growth Index

Population Growth Index 2002-2030



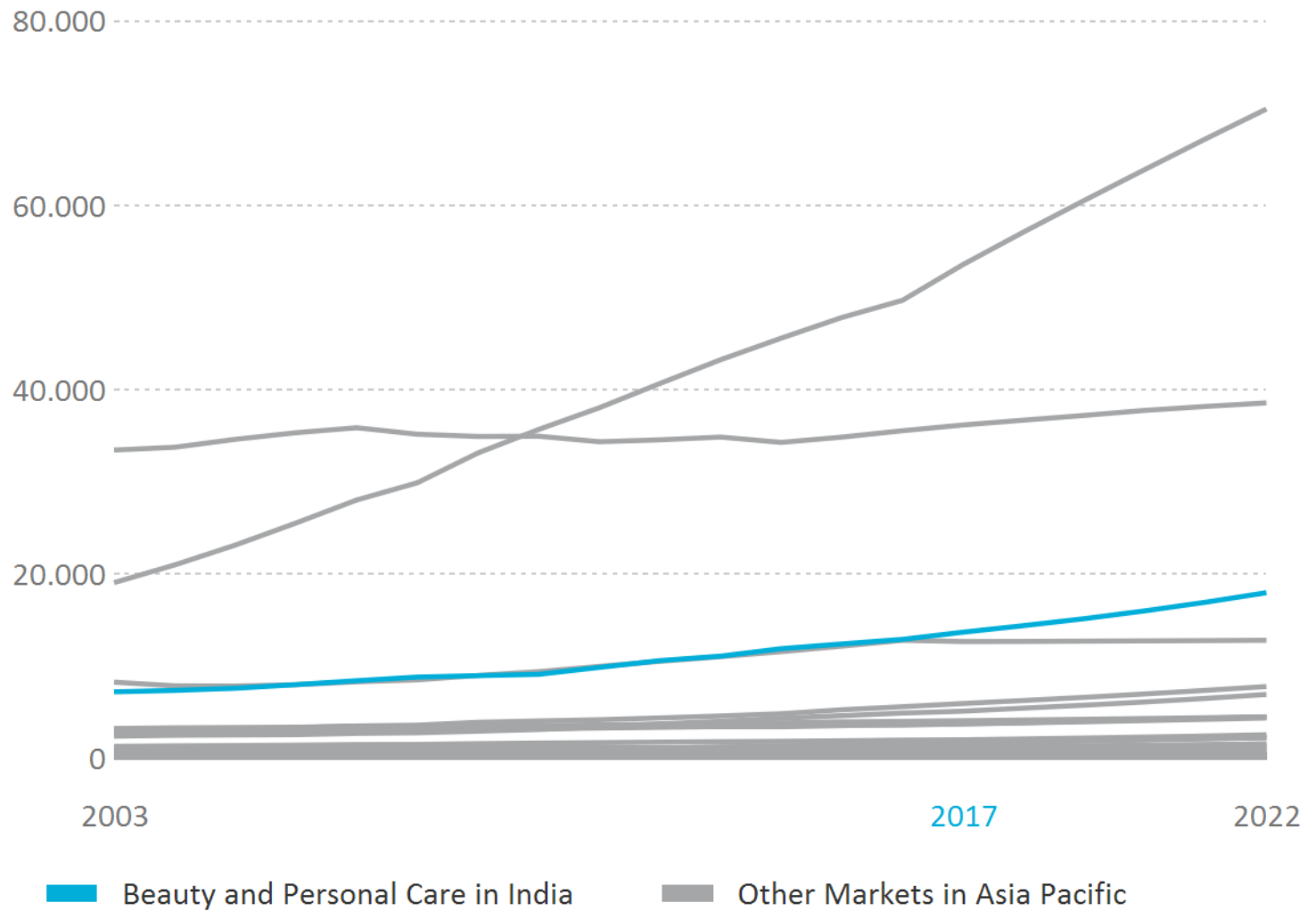
Beauty and Personal Care vs Selected FMCG Industries





Beauty and Personal Care in India

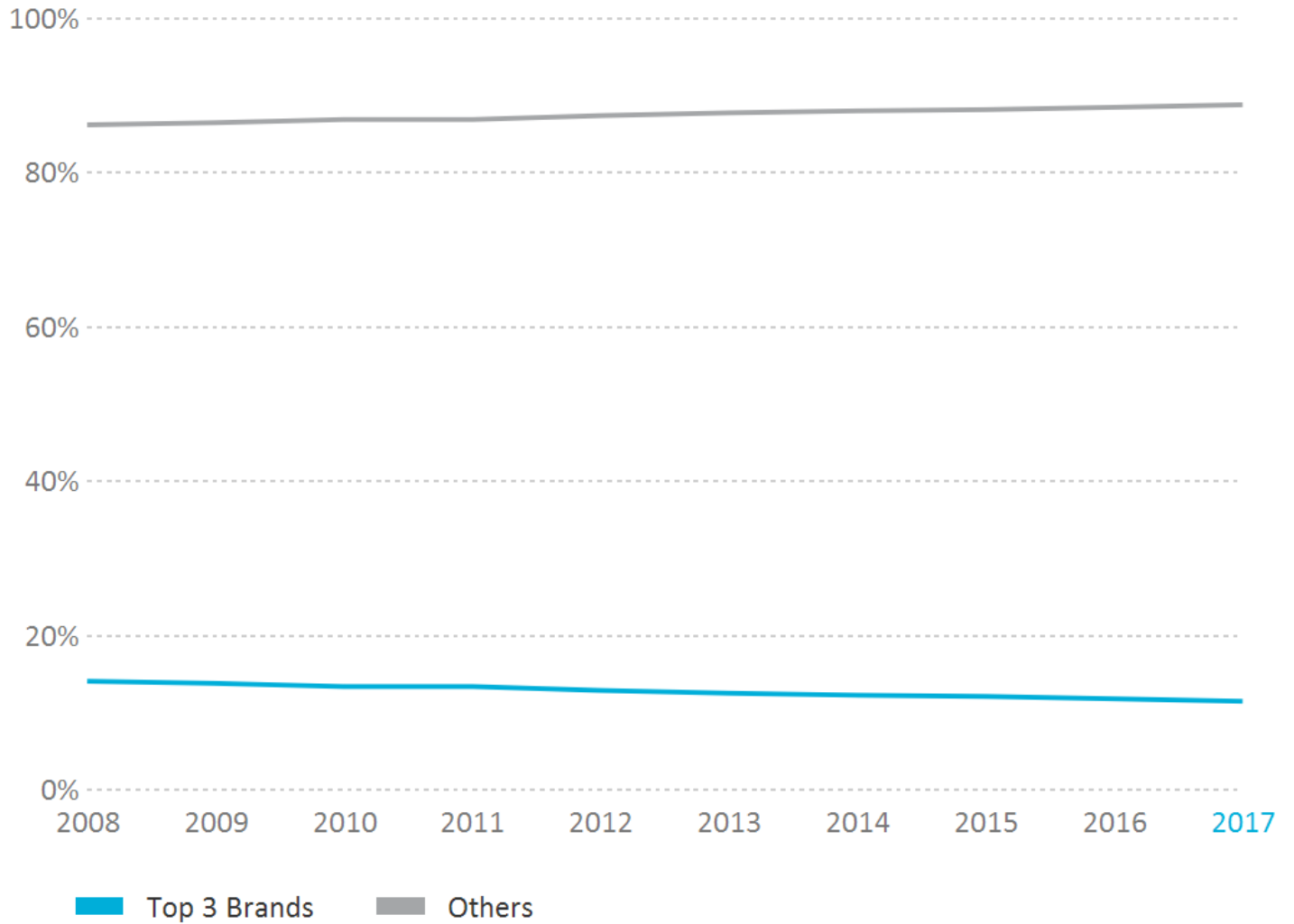
Retail Value RSP - USD million - Constant - 2003-2022





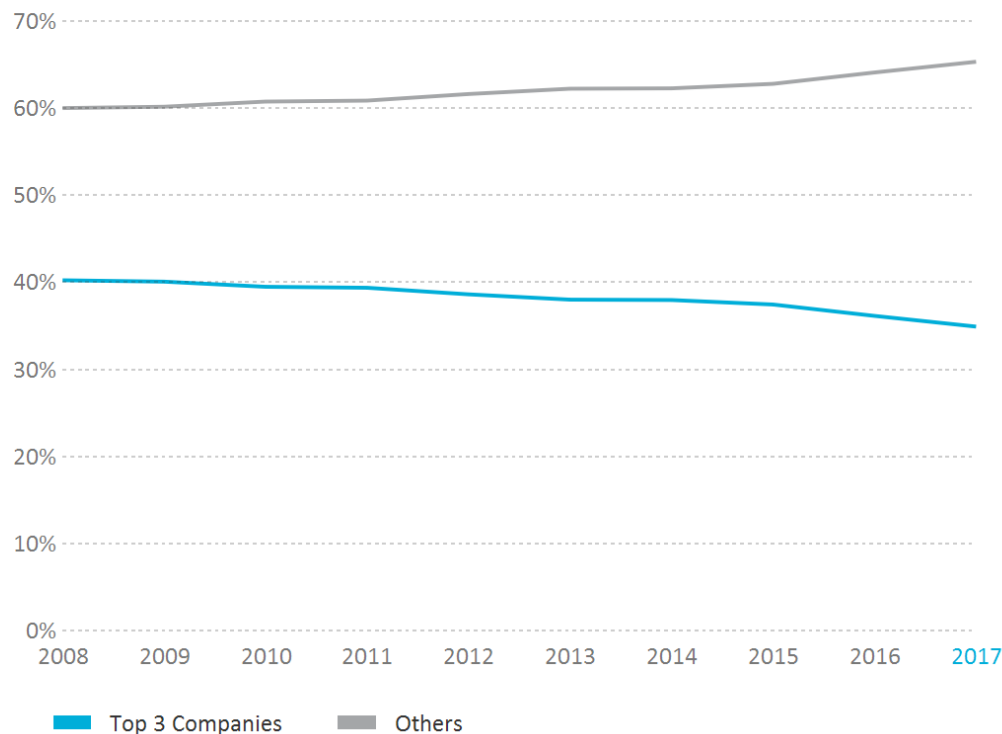
Market Concentration of Beauty and Personal Care in India by Brand

% Share (LBN) - Retail Value RSP - 2008-2017



Market Concentration of Beauty and Personal Care in India by Company

% Share (NBO) - Retail Value RSP - 2008-2017



Retail Sales Performance in Beauty and Personal Care in India by Company

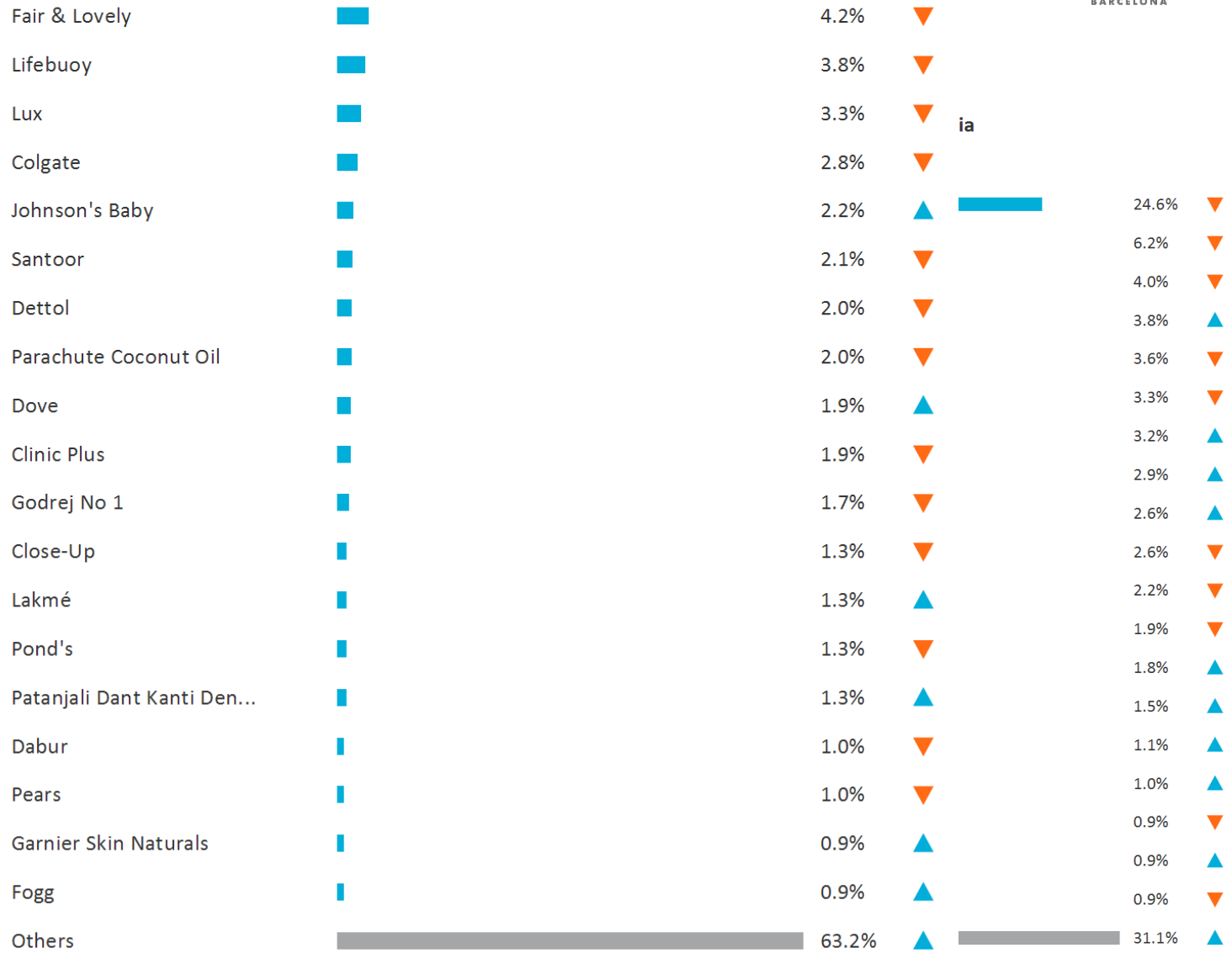
Retail Value RSP (NBO) - EUR million 2017 - % CAGR 2012-2017

Company	Retail Value RSP Sales	% CAGR Growth
Hindustan Unilever Ltd	2.962,0	9,6
Colgate-Palmolive India Ltd	747,0	8,8
Marico Ltd	484,7	10,6
L'Oréal India Pvt Ltd	461,0	15,2
Godrej Consumer Products Ltd	439,6	8,2
Dabur India Ltd	394,8	9,6
Johnson & Johnson (India) Ltd	382,2	16,9
Patanjali Ayurved Ltd	347,2	56,3
Reckitt Benckiser (India) Ltd	314,2	12,3
Others	5.517,5	12,3



Brand Shares of Beauty and Personal Care in India

% Share (LBN) - Retail Value RSP - 2017

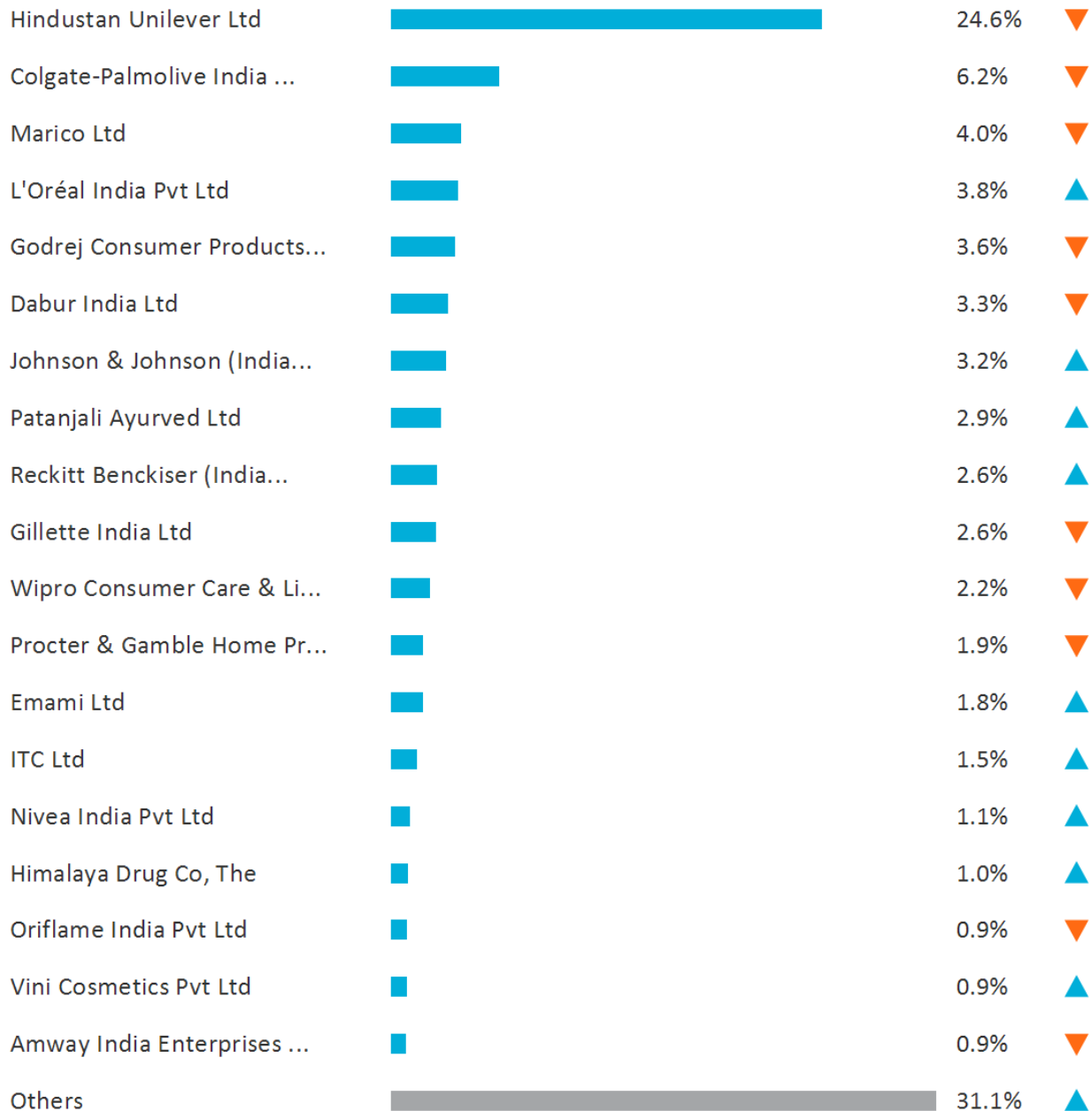


▲ Increasing share ▼ Decreasing share — No change



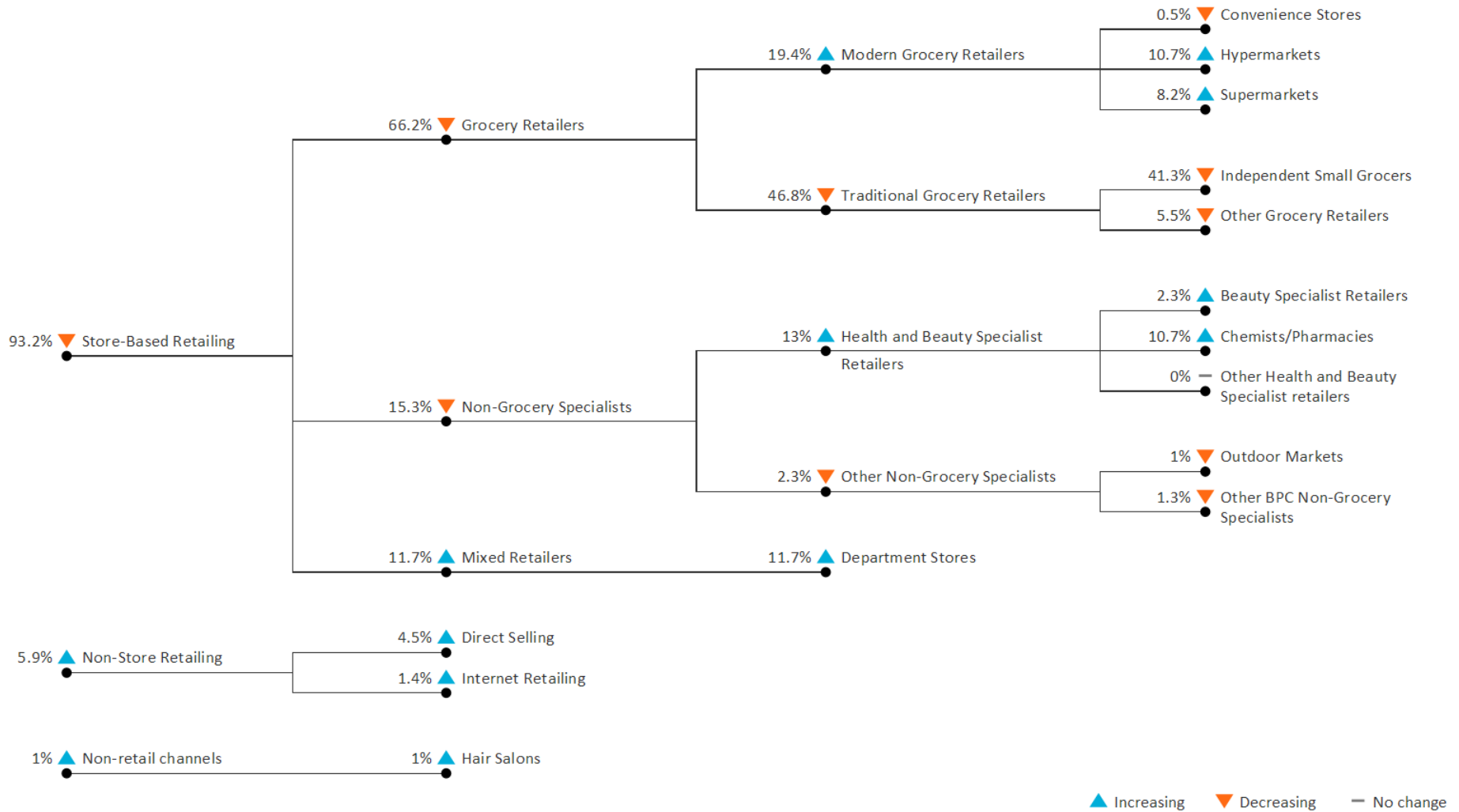
Company Shares of Beauty and Personal Care in India

% Share (NBO) - Retail Value RSP - 2017



Channel Distribution for Beauty and Personal Care in India

Retail Value RSP 2017 and Percentage Point Growth - 2012-2017



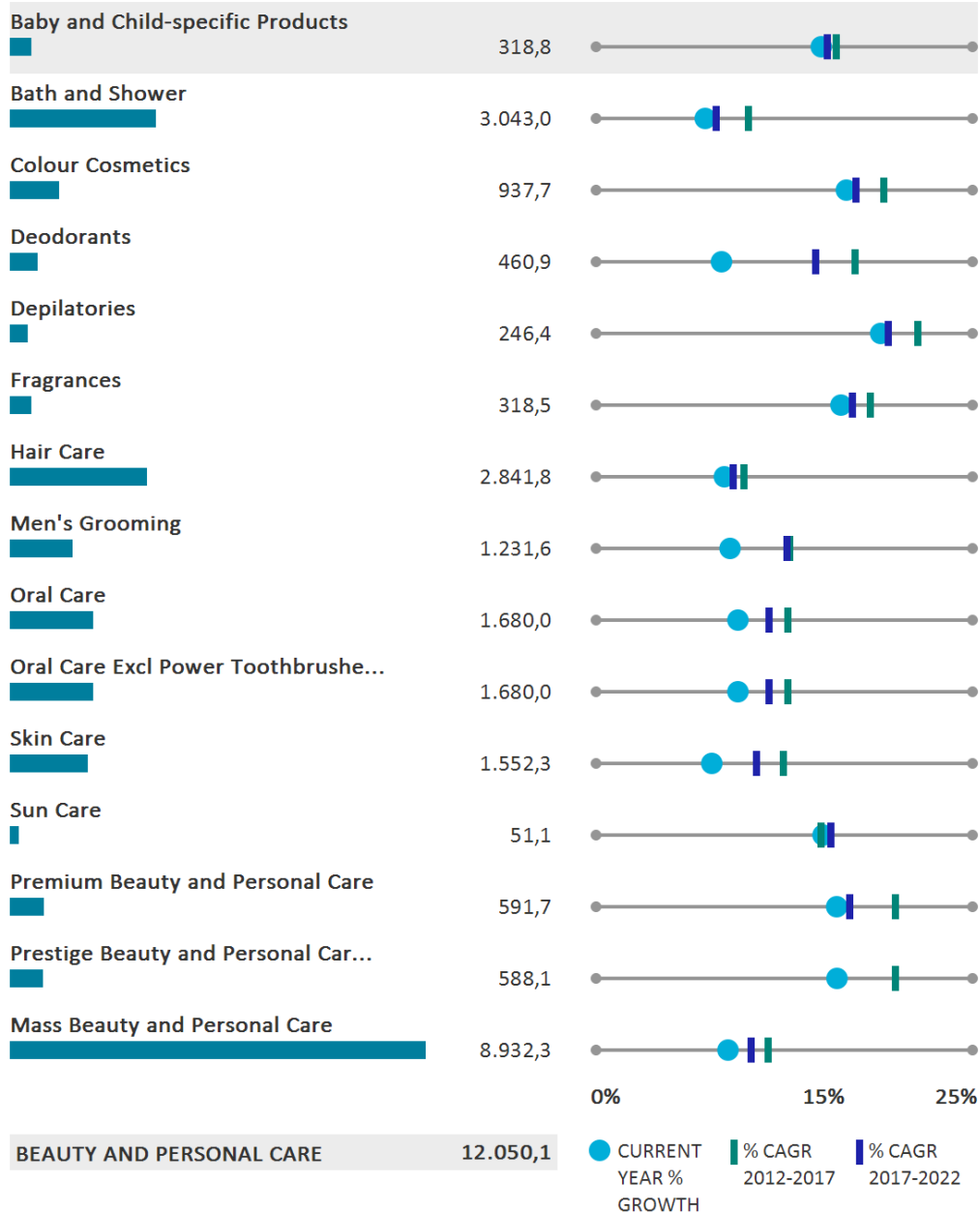


Sales of Beauty and Personal Care in India by Category

Retail Value RSP - EUR million - Current - 2017

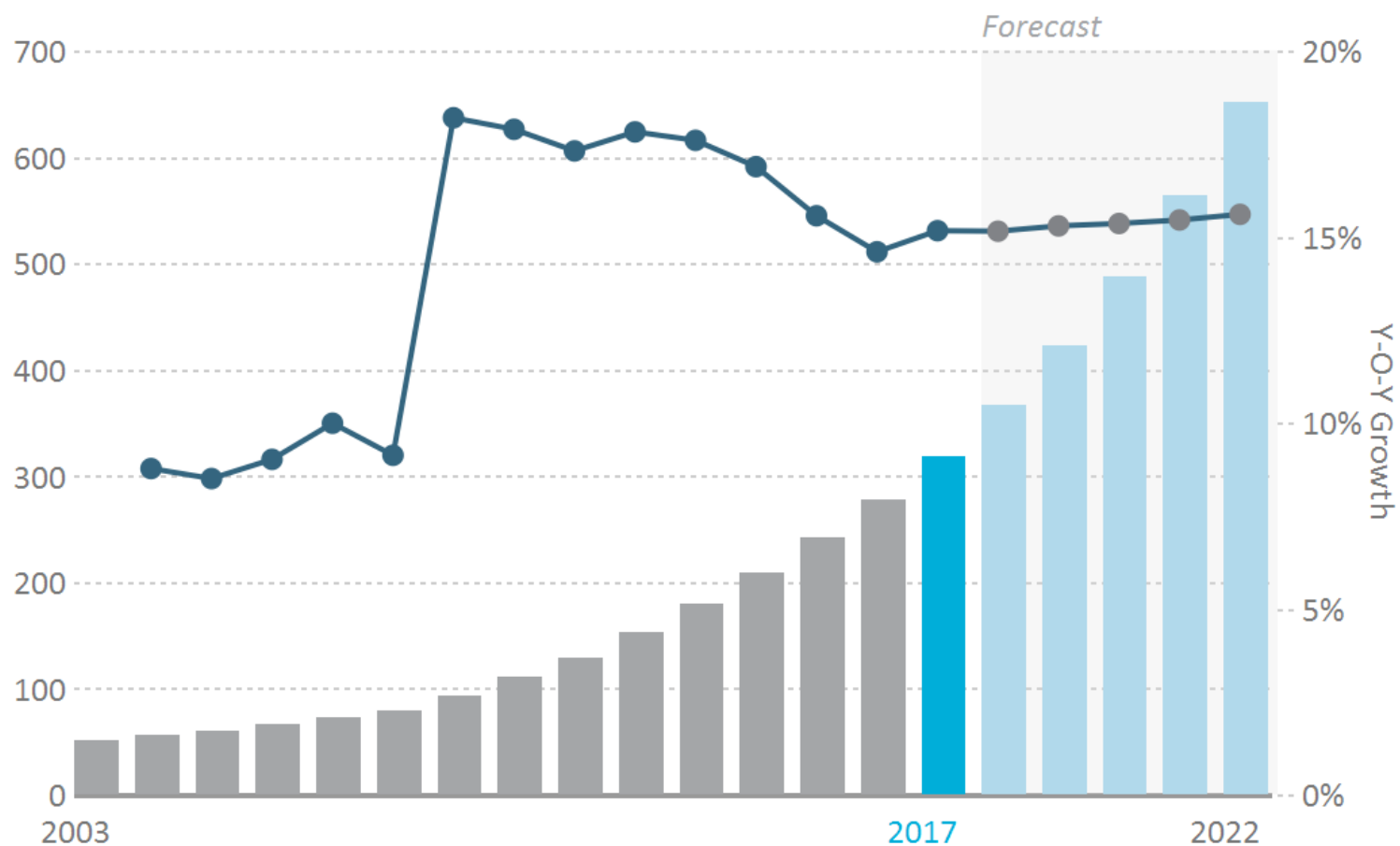
Growth Performance

Click on a Category to update Sales Chart

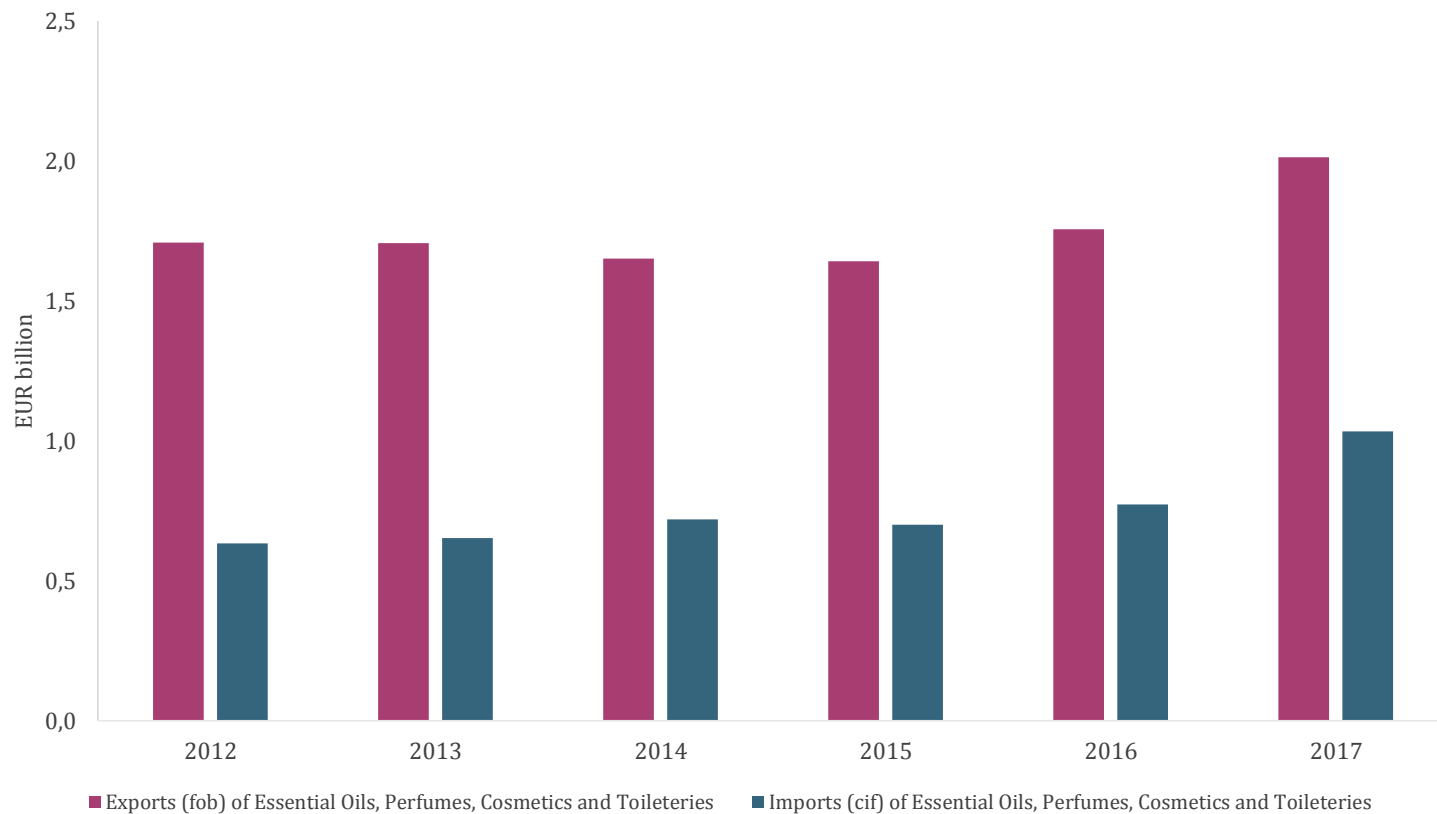




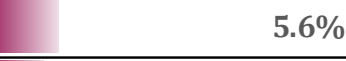
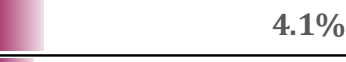

Sales of Baby and Child-specific Products in India

Retail Value RSP - EUR million - Current - 2003-2022



Exports and Imports



Colour Cosmetics			
Brand	Company	Value Market Share 2017	Change in Market Share 2012/17
Lakmé	Unilever Group	 11.6%	↓ -1.0%
Gemey/Maybelline/Jade	L'Oréal Groupe	 7.8%	↑ 2.2%
Elle 18	Unilever Group	 5.6%	↓ -2.3%
Mac	Estée Lauder Cos Inc	 4.1%	↑ 0.8%
Colorbar	Colorbar Cosmetics Pvt Ltd	 3.3%	↑ 1.9%

Hair Care			
Brand	Company	Value Market Share 2017	Change in Market Share 2012/17
Parachute	Marico Ltd	 11.3%	↓ -0.3%
Clinic Plus	Unilever Group	 7.9%	↓ -0.9%
Dabur	Dabur India Ltd	 4.2%	↑ 0.2%
Nihar	Marico Ltd	 3.8%	↑ 0.9%
Head & Shoulders	Procter & Gamble Co, The	 3.6%	↓ -1.7%

Fragrances			
Brand	Company	Value Market Share 2017	Change in Market Share 2012/17
Old Spice Aftershave	Procter & Gamble Co, The	4.3%	↓ -0.7%
Axe/Lynx/Ego	Unilever Group	3.4%	↓ -0.6%
Burberry for Women	Coty Inc	2.5%	↑ 0.5%
Hugo Boss Hugo Woman	Coty Inc	2.5%	↑ 0.6%
Calvin Klein Obsession for Men	Coty Inc	2.5%	↑ 0.2%

Skin Care			
Brand	Company	Value Market Share 2017	Change in Market Share 2012/17
Fair & Lovely	Unilever Group	34.5%	↓ -5.9%
Garnier Skin Naturals	L'Oréal Groupe	6.8%	↑ 0.2%
Pond's	Unilever Group	6.4%	↑ 0.7%
Himalaya Herbals	Himalaya Drug Co, The	5.6%	↑ 1.6%
Emami Fair & Handsome	Emami Ltd	3.3%	↑ 0.9%

Cosmetic market to post positive growth with consumers willing to spend on personal care



Rising disposable income and consumer aspirations encouraged premiumisation trend

With the fading impact of demonetisation and rising disposable incomes, the beauty and personal care market in India fell under the influence of premiumisation in 2017. The implementation of GST reduced the unit prices of personal care products and thus encouraged consumers to invest in premium products, helping perpetrate the premiumisation trend.



Focus on beauty and personal grooming drove growth of colour cosmetics

Colour cosmetics posted a strong CAGR of 19% over 2012/17, due to the rising beauty consciousness among women. Products such as eye shadow, lip gloss and mascara, which were previously only used for parties and weddings, are now often used by women to enhance their features. This trend is expected to continue over 2017/22, driving the growth of the category.



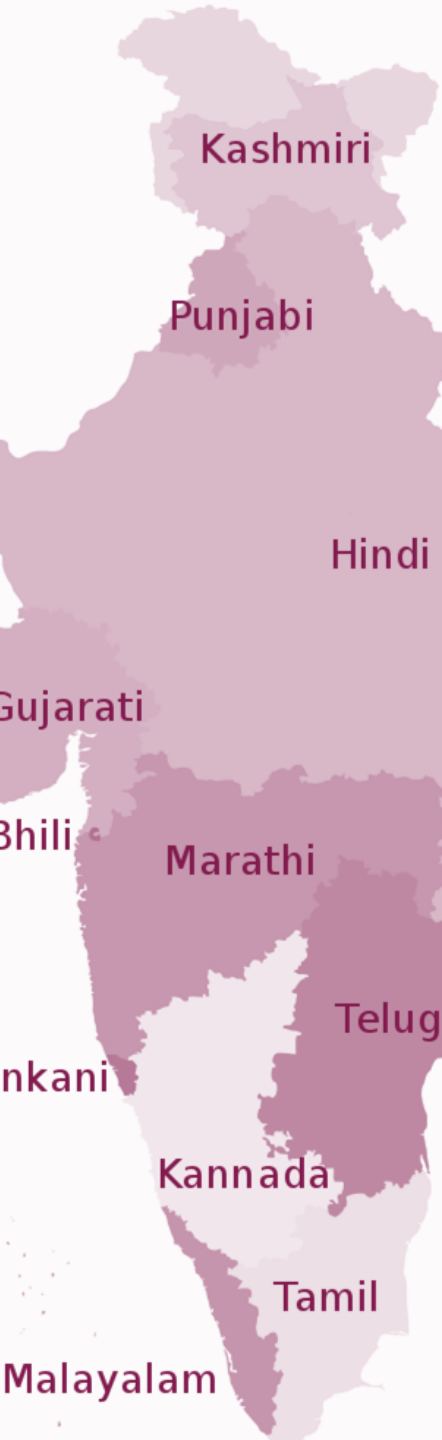
Products with natural ingredients thrive in the market in 2017

Consumers are becoming increasingly aware about the long-term effects of using chemically-infused products. To prevent the impact of this harm, consumers are demanding products with high quality natural and herbal ingredients. This trend encouraged companies such as Unilever and Marico to launch new product variants^[1] over 2012/17.



Men's personal care proves to be a potential category with men's grooming on the rise

With an increasing focus on personal appearance and rapidly evolving taste and preferences, young men in India made men's grooming a lucrative business over 2012/17 by increasing their expenditure on hair and skin care products. To tap into this trend, brands such as Brylcreem expanded its portfolio with value additions such as hair loss protection, dandruff protection, and shine protection.



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