

South East Asia Beauty and Personal Care Trends (Extracts)



The agenda

01

Spot the emerging opportunities in social commerce

02

Explore the changing dynamics in men's grooming

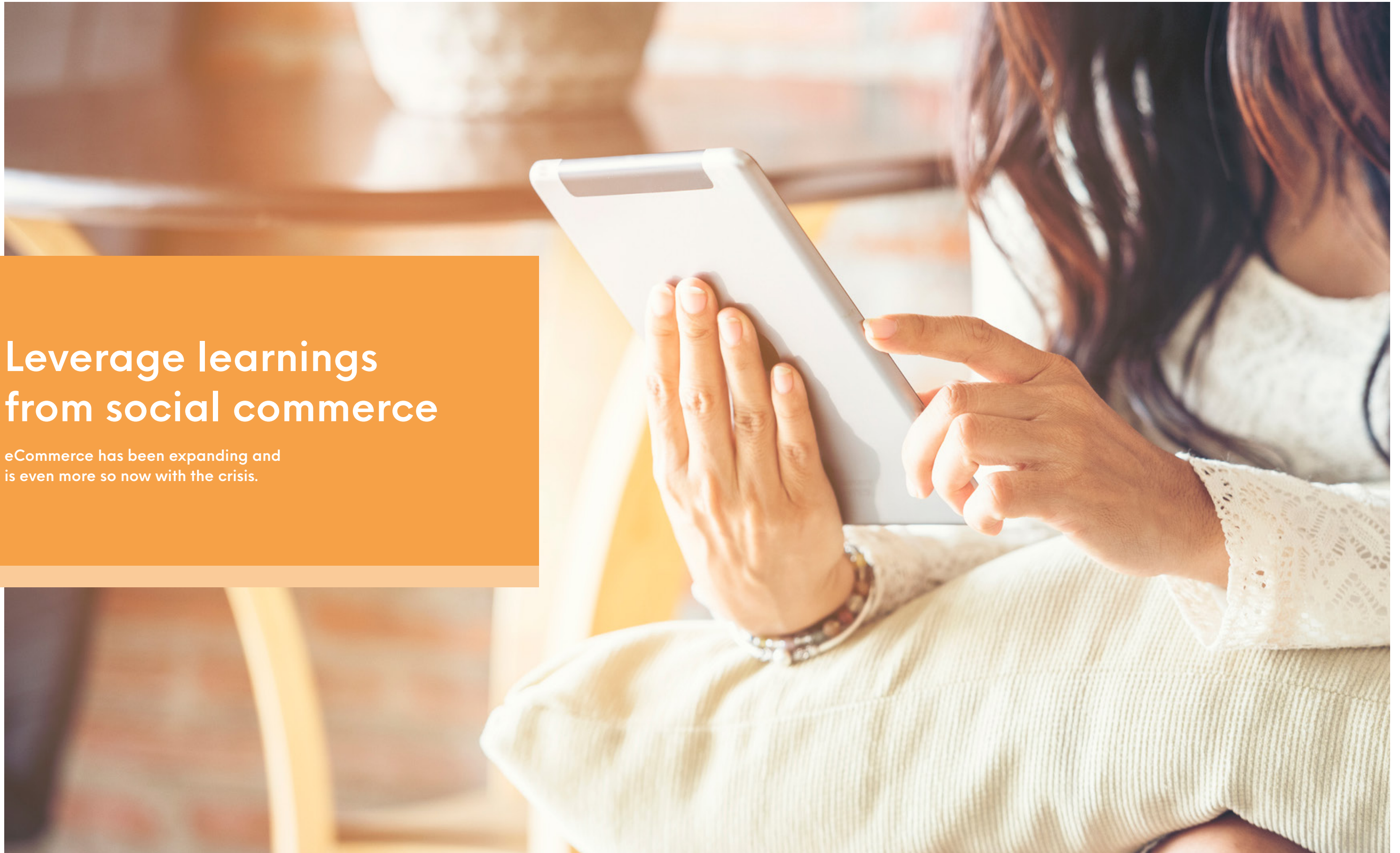
03

Identify opportunities in derma-skincare



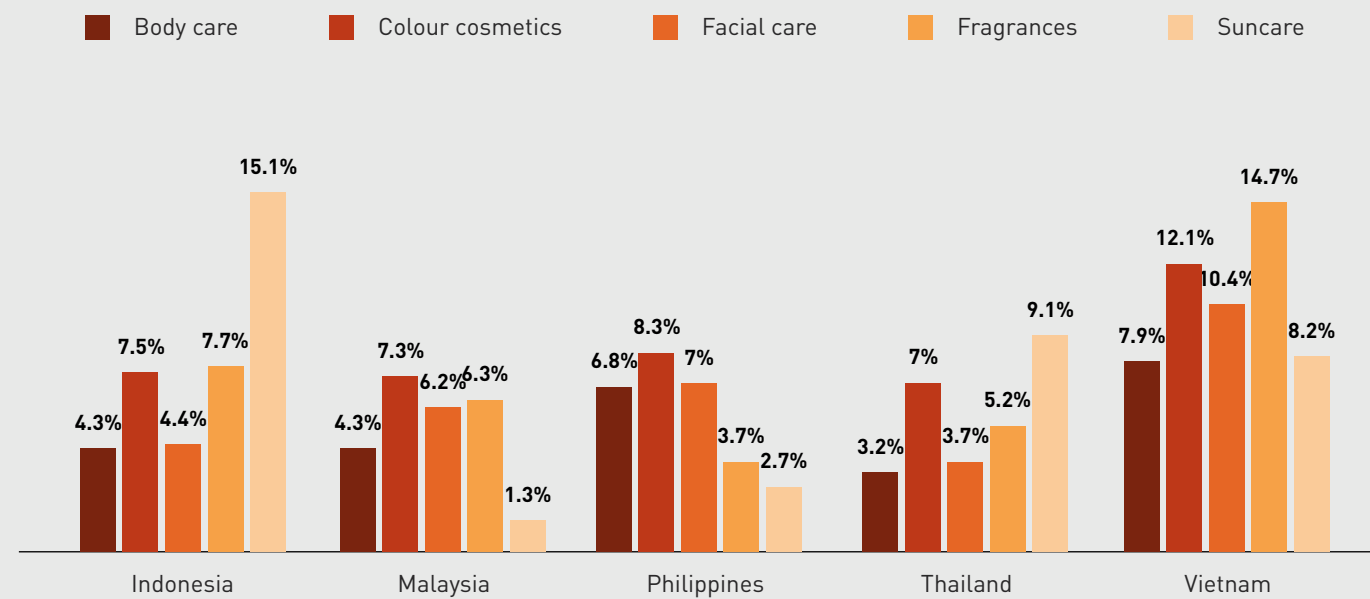
Leverage learnings from social commerce

eCommerce has been expanding and
is even more so now with the crisis.



Vietnam, Indonesia and Thailand are emerging SEA beauty markets

Emerging SEA markets: CAGR for key beauty categories, next five years



Source: Economist Intelligence Unit, trade interviews/Mintel

Online marketplaces are gaining momentum



Strong social commerce drives growth in SEA

The region has seen dramatic increases in internet access, social media usage and ecommerce.

This suggests the growth of digital businesses as well as the high usage activity among consumers within the region.

THE VALUE OF ECOMMERCE

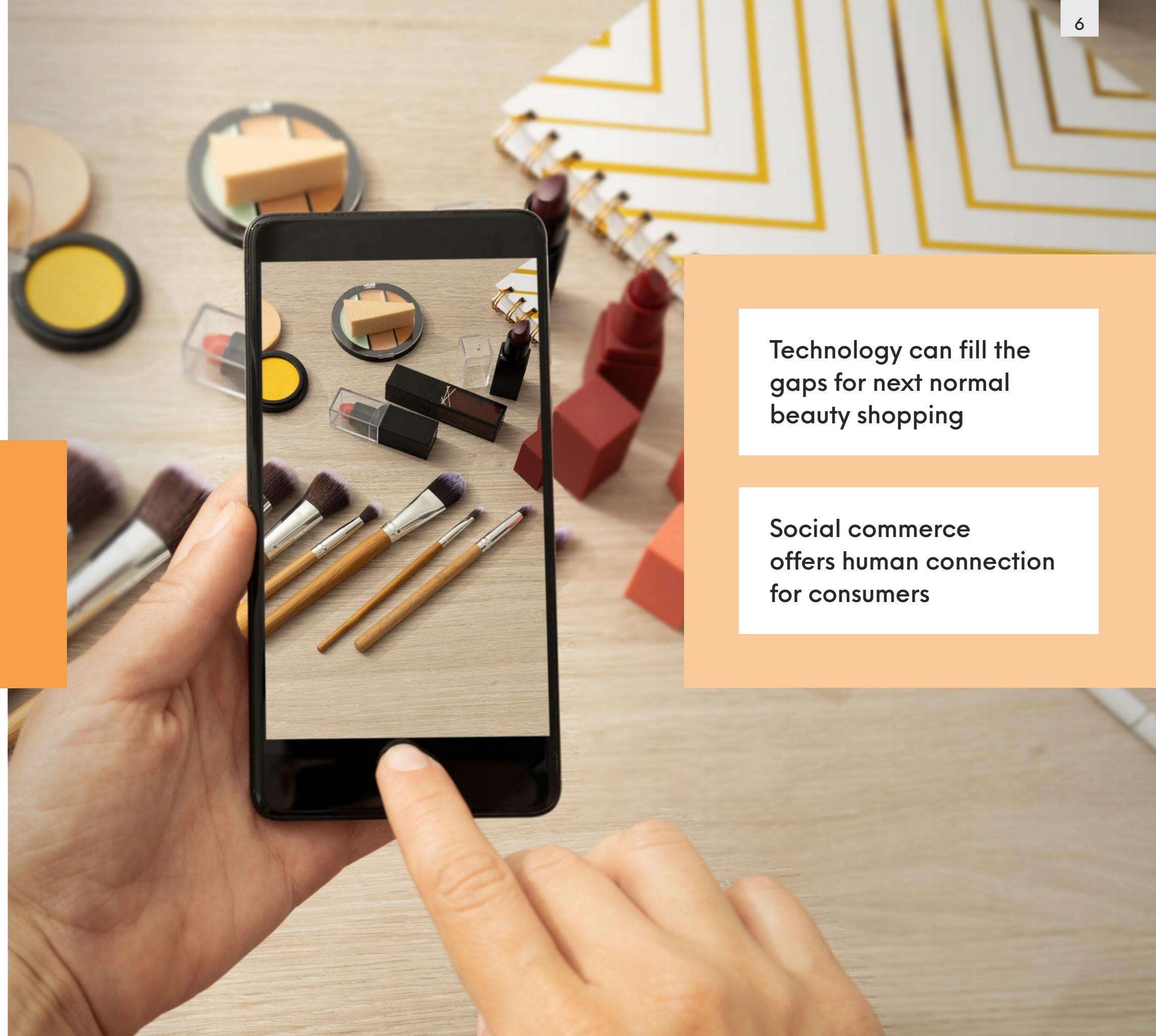
\$240bn

The value of ecommerce in SEA is estimated to reach this amount by 2025.

Source: Think with Google; The Straits Times; Al Jazeera; Asean Up

Technology can fill the gaps for next normal beauty shopping

Social commerce offers human connection for consumers



Entertainment and gamification is starting to integrate into online shopping experience

GAMIFICATION

30%

of Thai beauty and personal care consumers enjoy collecting coupons and discount codes from online retailer platforms

INTERACTION

22%

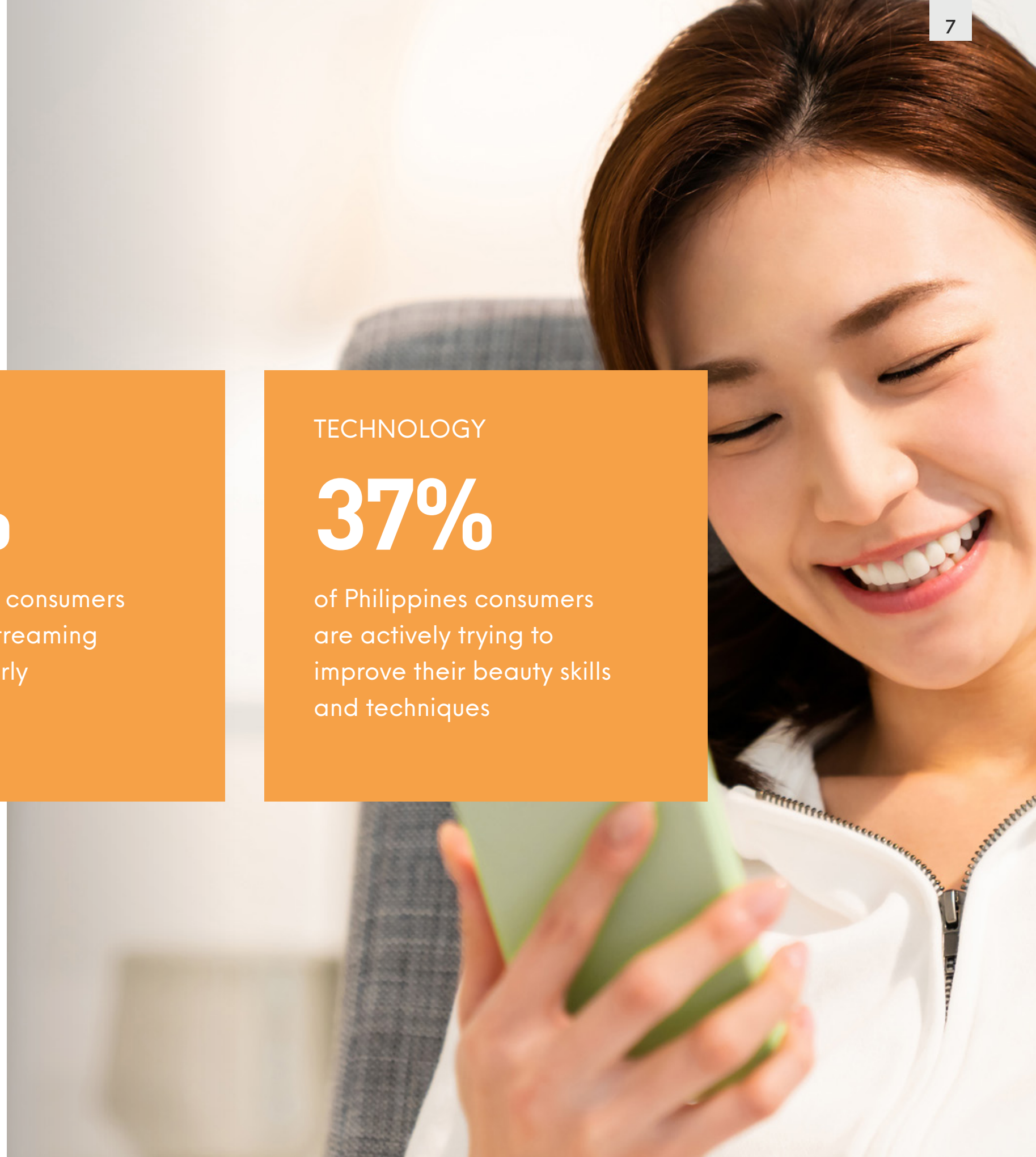
of Vietnamese consumers tune in to livestreaming content regularly

TECHNOLOGY

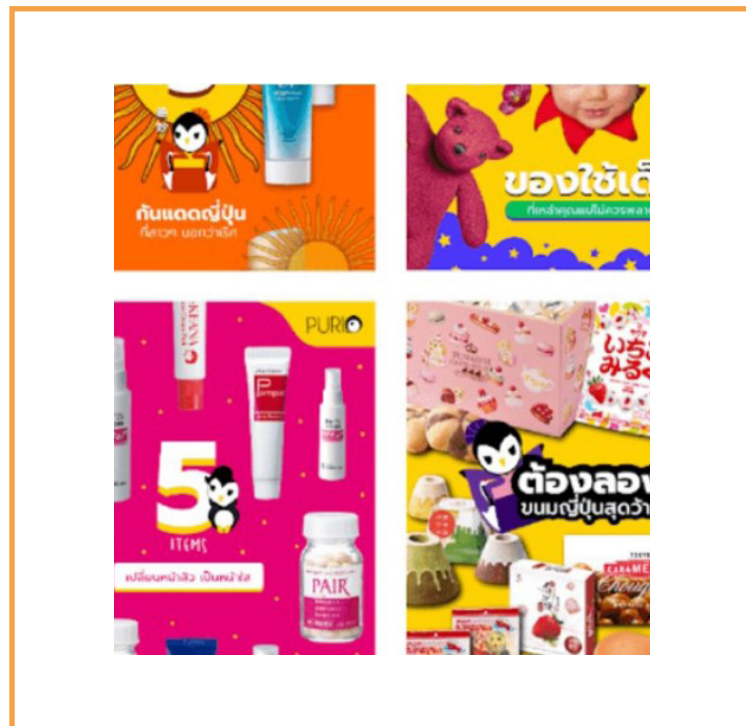
37%

of Philippines consumers are actively trying to improve their beauty skills and techniques

Base: 1,953 internet users aged 18+ who have purchased beauty products in the last three months;
Vietnam: 1,000 internet users aged 18+; Philippines: 1,000 internet users aged 18+
Source: Dynata/Mintel, Rakuten Insight/Mintel



C2C marketplace drives the rise of micro-preneurs and beauty trends online

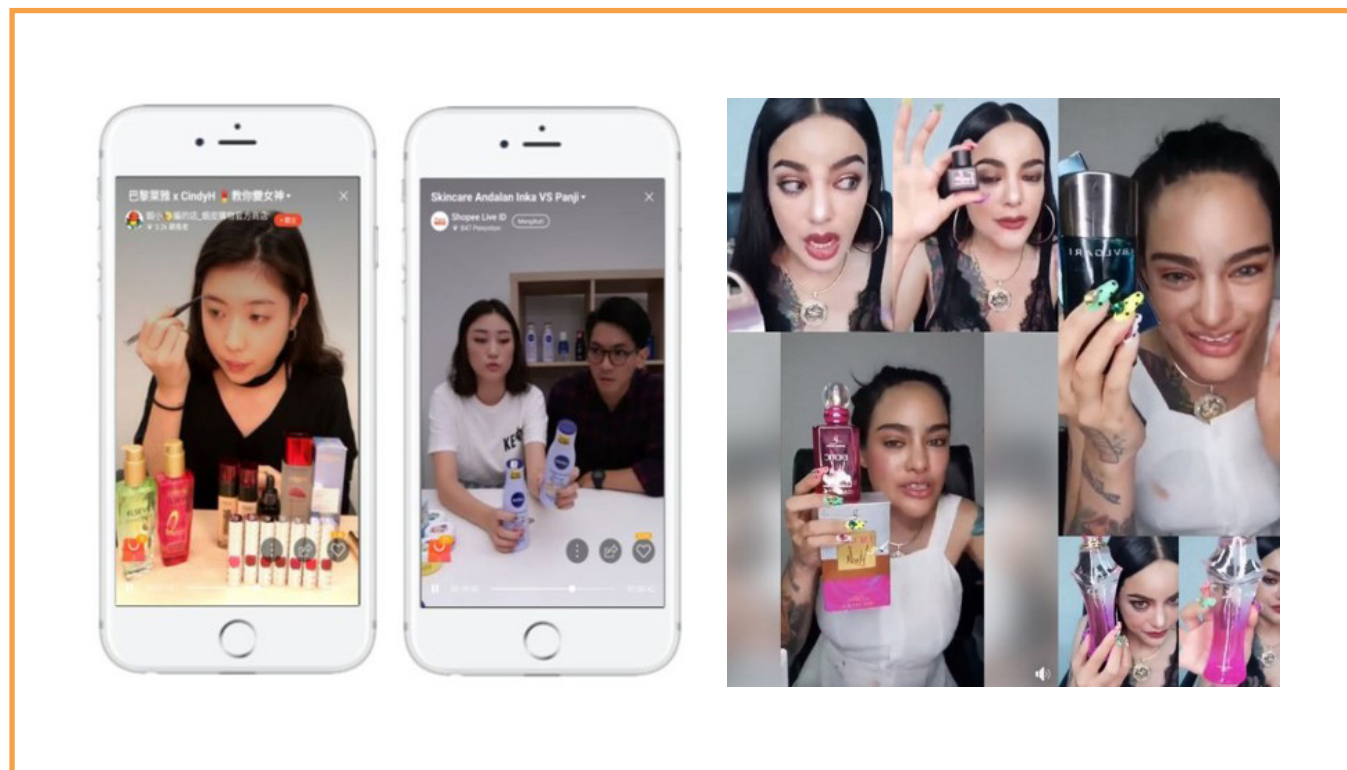


The consumer-to-consumer (C2C) model is another type of social commerce that is kicking off well in SEA.

Source: Max Pincha

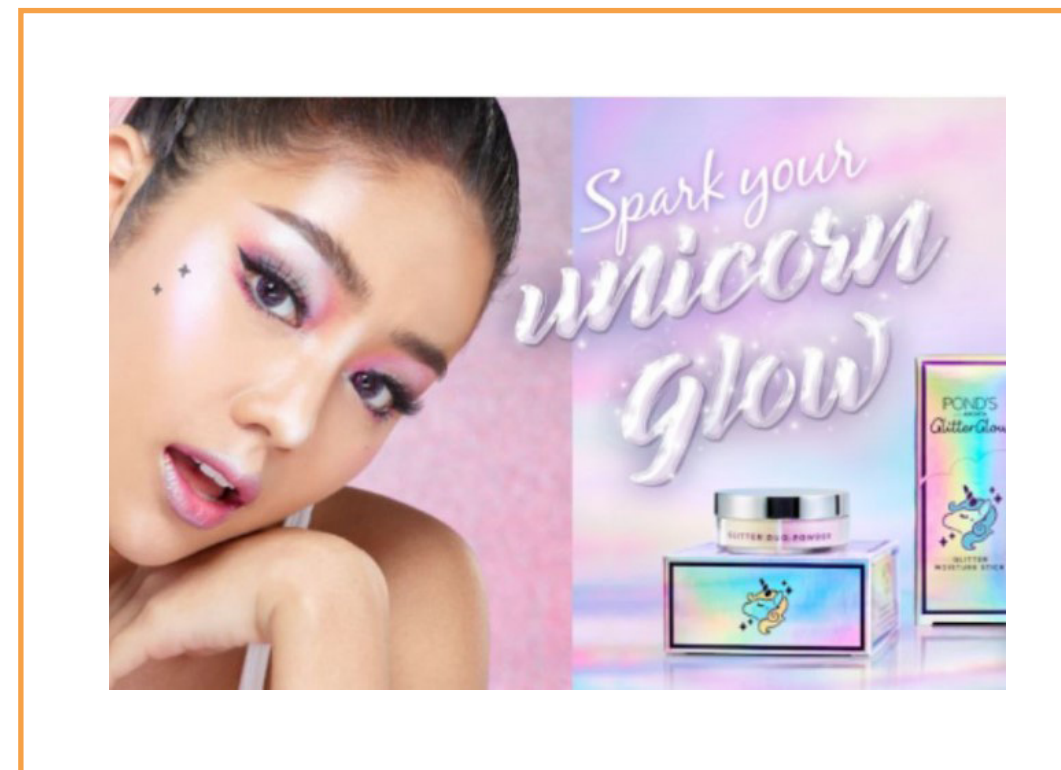


Live stream shopping has quickly escalated in SEA



Source: YouTube/JAELENG

Beauty giants can compete in social commerce through influencers



Pond's collaboration with beauty influencer Archita for its GlitterGlow Range.

Source: Anthem; Cosmetics Design Asia

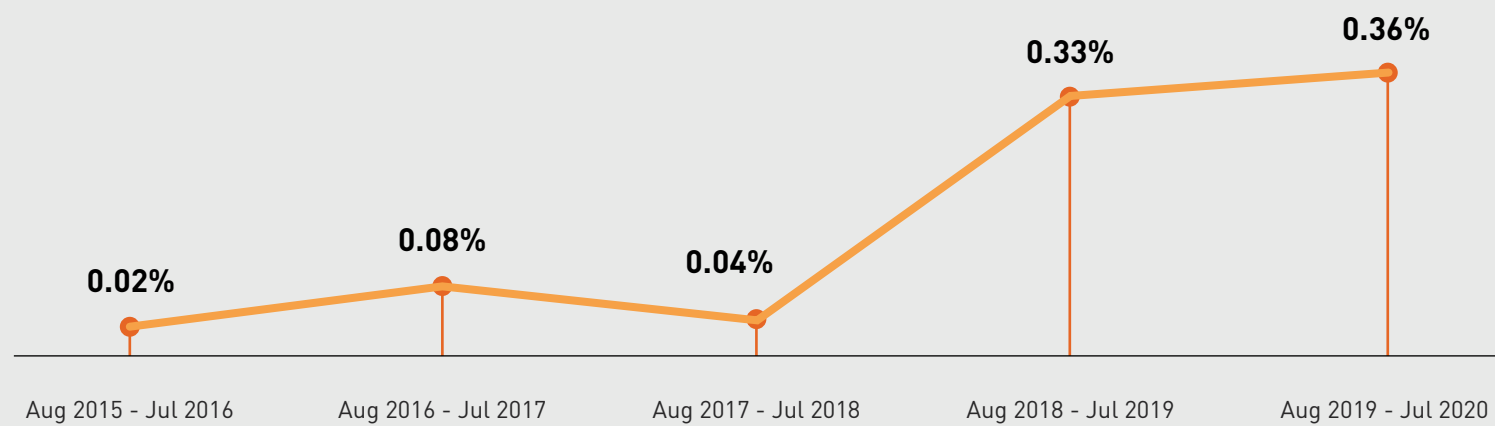
Masculinity redefined

Men's grooming across SEA remains undefined, in turn presenting opportunities for brands to take charge.

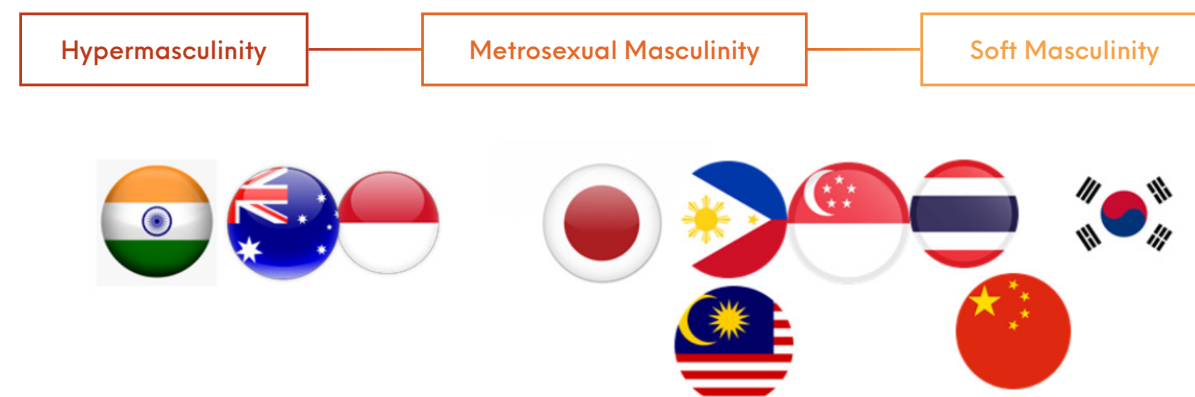


Dive into the ocean of men's colour cosmetics

APAC: percentage of colour cosmetics launches targeting men (% of launches)



Identify the market's influences and positioning on the masculinity scale



Transfer hair care
users to face care

Injects masculinity
into colour cosmetics



'Style your face and skin as you
would style your hair'

IN2IT Men

Source: Facebook/Srichand For Men

Srichand For Men testimonial –
"Manliness is defined by choice"

Promote a lifestyle pursuit



FEEL CONFIDENT

46%

of men in Asia are interested in beauty and grooming products that make them feel confident

Base: Australia, China, Hong Kong, India, Indonesia, Japan, Malaysia, New Zealand, Philippines, Singapore, South Korea, Thailand, Vietnam; 1,000 internet users aged 16+ in each market
Source: Dynata/Mintel; Lightspeed/Mintel; Offerwise/Mintel; Rakuten Insight/Mintel

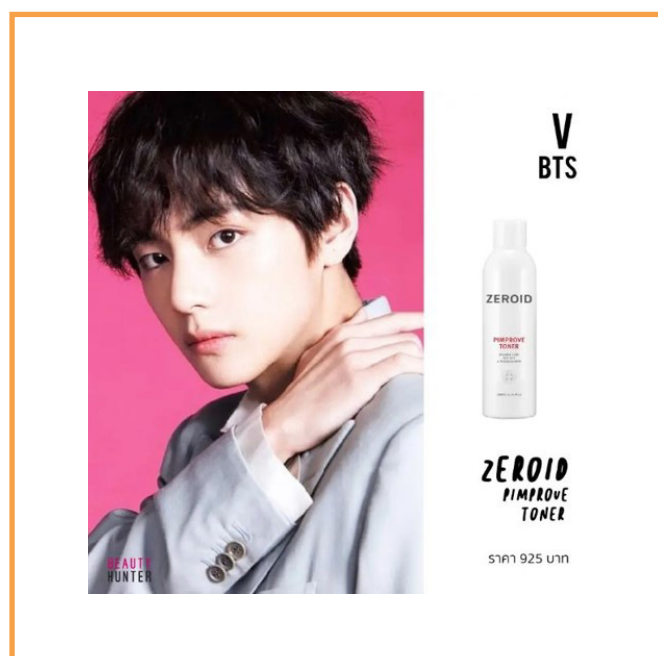


Rise of dermacosmetics

Young consumers are increasingly drawn to dermacosmetics as brands take the 'fashion derma' approach



Facial care
becomes consumer's
stronger focus



South Korea is leading the trends in SEA

Dermacosmetics are
becoming more youthful



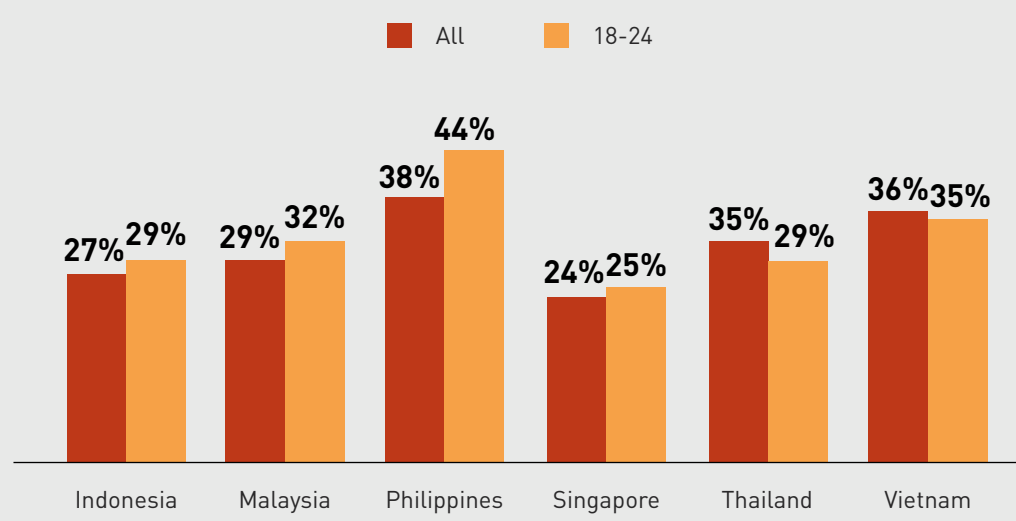
| Package design

| Claims targeting young skin concerns and issues



Young consumers are the new target for dermacosmetics

Emerging SEA markets: willingness to pay premium for skincare developed by scientists/researchers, 2021



Efficacy and gentleness are the leading reasons to use dermacosmetics

Base: 434 internet users aged 18-24 who have used dermacosmetics in the past six months
Source: Dynata/Mintel



Key takeaways

01

Emphasize interaction and entertainment in online retail

02

Relook at opportunities in men's grooming

03

Target young consumers with fashion-derma





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