

The Latest Haircare product and R&D trend in South Korea

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Haircare market

KOREA shampoo market

Key trends

Future trends

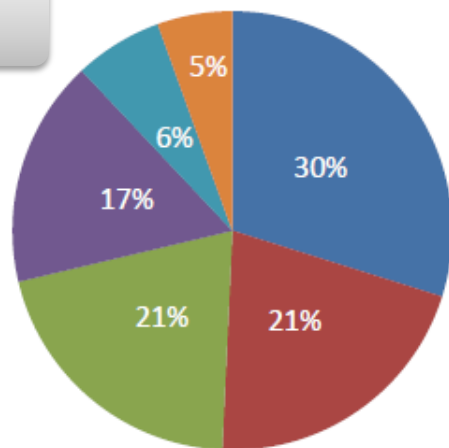
Ryo in China



Global Hair care

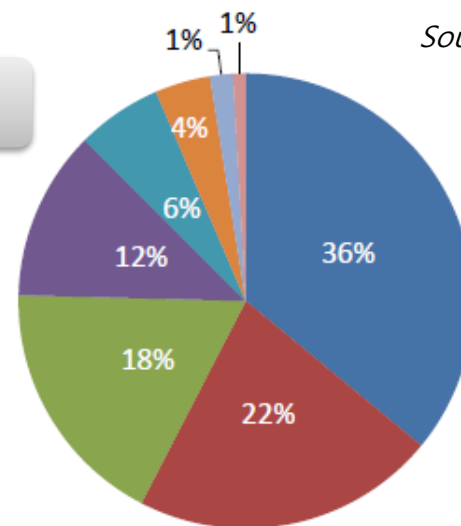
- Global Hair Care Market in 2014 was USD \$ 81Bn (503Bn RMB)
- Asia pacific and Latin America took over 50% of the market share, which also showed high CAGR
- In all of the Hair care products, Shampoo & conditioner took the highest share and showed high CAGR

Region



| | CAGR 2010-2014 | CAGR 2015-2018 |
|----------------------|-------------------|-------------------|
| Asia Pacific | 4.8 | 5.9 |
| Latin America | 4.6 | 6.7 |
| Western Europe | 2.5 | 2.9 |
| North America | 2.5 | 4.3 |
| Eastern Europe | 2.5 | 4.1 |
| Middle East & Africa | 5.6 | 6.7 |

Segment



Source : euromonitor/IFF

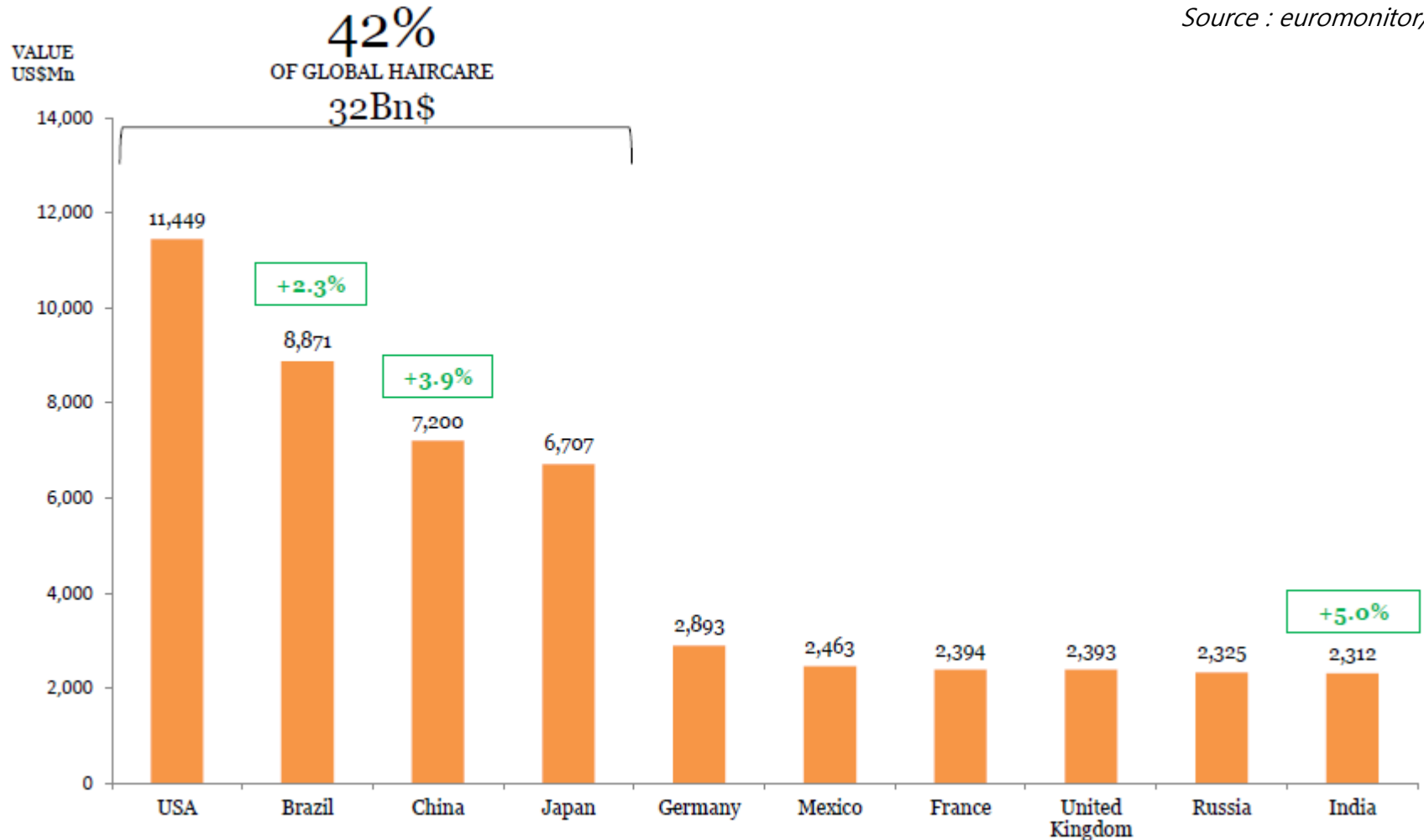
| | CAGR 2010-2014 | CAGR 2015-2018 |
|----------------------|-------------------|-------------------|
| Shampoos | 4.3 | 5.3 |
| Conditioners | 5.6 | 6.8 |
| Colourants | 2.8 | 4.5 |
| Styling Agents | 1.1 | 3.5 |
| Salon Hair Care | 2.3 | 4.4 |
| 2-in-1 Products | 2.2 | 4.0 |
| Perms and Relaxants | 3.3 | 4.7 |
| Hair Loss Treatments | 1.3 | 4.4 |

Global Hair care

- Divided by nations, USA-Brazil-China-Japan took the biggest market share, about 42%.
- In these countries, Brazil and China got the highest CAGR, which means there are more growing space for the next year. And India got the highest growth rate.

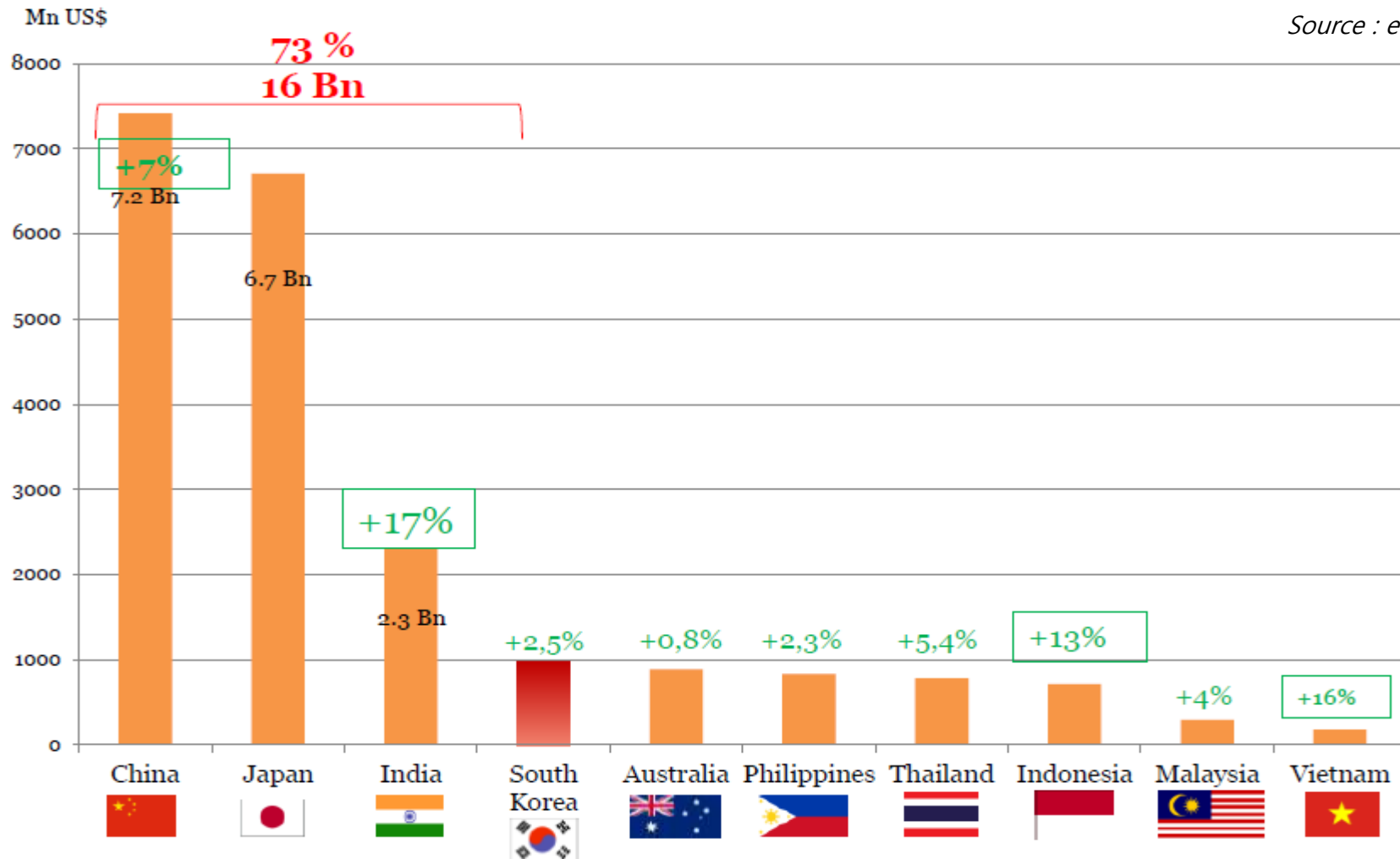
Source : euromonitor/IFF

Nation



ASIA Hair care

- Asia Market : USD \$21Bn (130Bn RMB)
- Japan and China have the biggest hair care market in Asia (66%)
- India and Indonesia will lead the future growth trends.

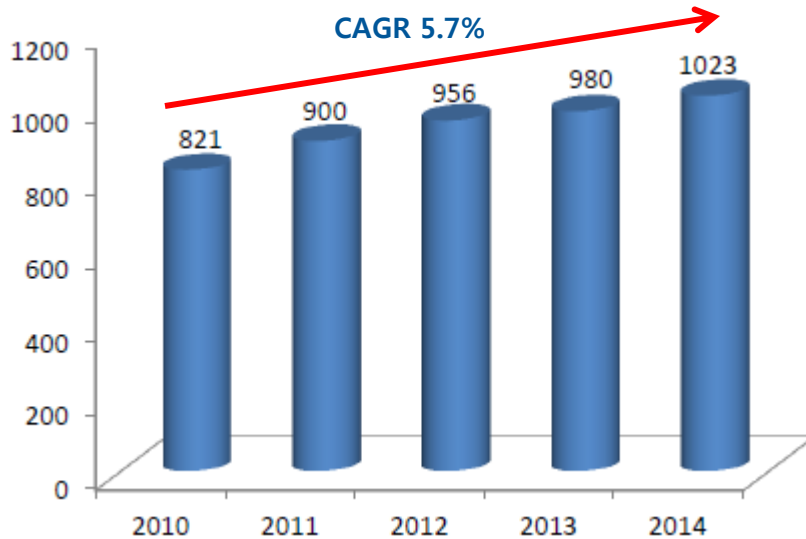


Korea Hair care

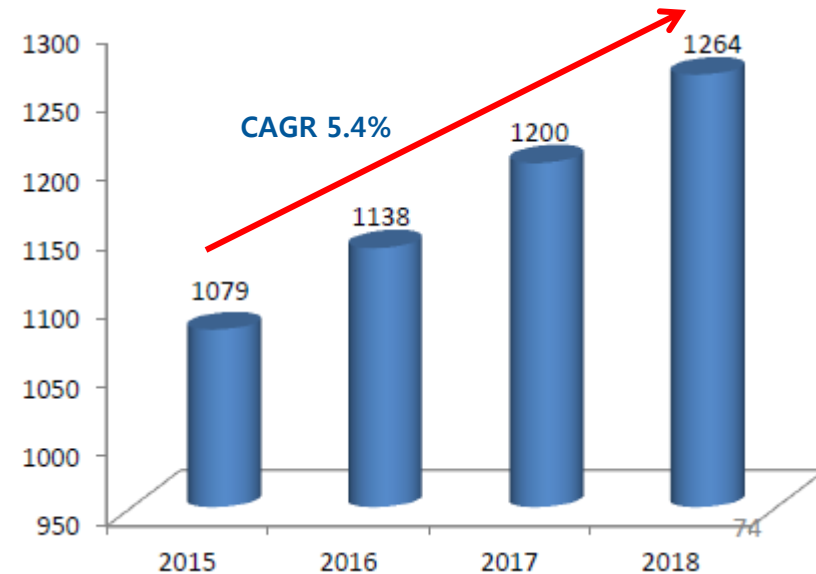
- Hair Care market in Korea kept on growing during 2010-2014.
- Korea Hair Care Market is expected to increase for about 5.4%, by the estimate value of USD \$ 1264Mn (8Bn RMB)

Source : euromonitor/IFF

Market Evolution 2010-2014



Future Growth 2015-2018

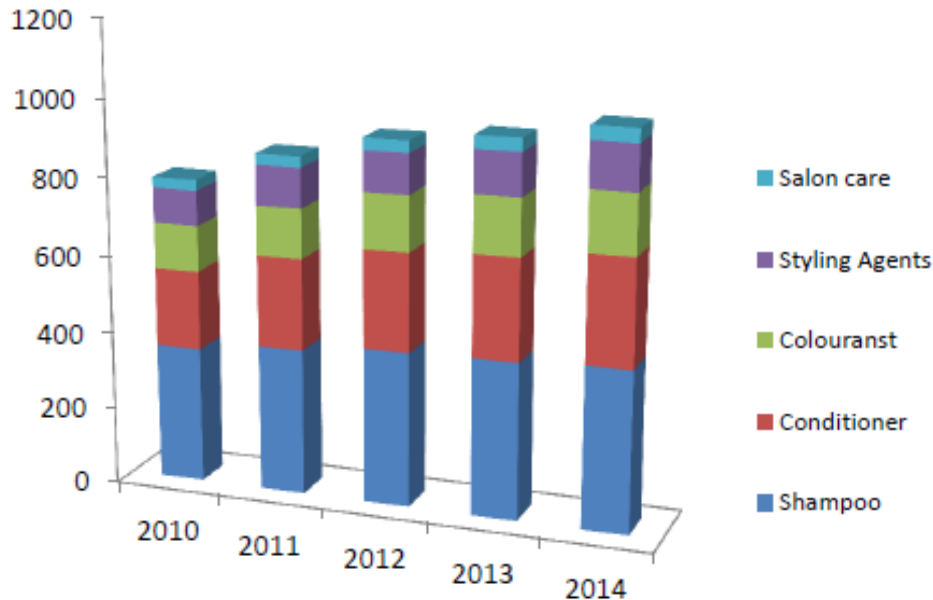


Korea Hair care

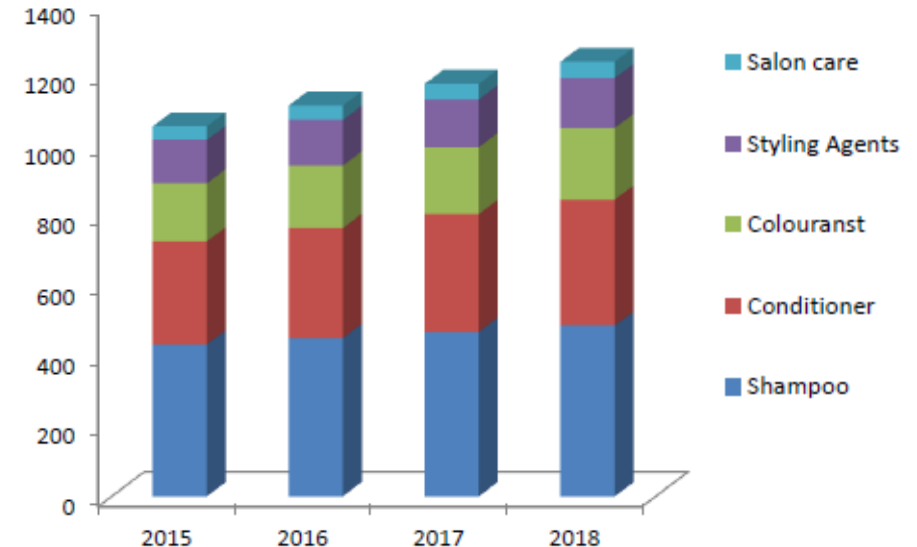
- Korean Hair care market is dominated by Shampoo & Conditioner
- In futuristic view, along with Shampoo & Conditioner categories, Colorants, Styling and Salon will also have competitive share.

Source : euromonitor/IFF

Segment Growth 2010-2014



Segment Growth 2015-2018



Key Trends in Korea

- 4 trends in Korea shampoo market : Scalp care, Damage care, Perfume, Natural
- These trends are still expected to be popular for a while.

Scalp care



Damage care



Perfume



Natural



Future Trends in Korea

- Anti-aging is not only limited in skin –but also been concerned in hair (Volume, grey hair care)
- Consumers are looking for more and more affordable professional expertise
- Dry shampoo and Cleansing conditioner are not popular so far, but which is expected to grow in the future

Hair Anti-aging



Professional



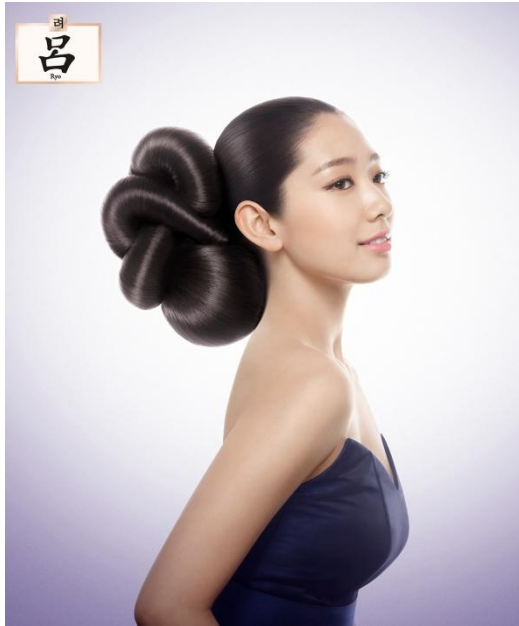
Water free



No poo



- Korea's Leading Premium Hair Care Brand 'RYO' makes Stronger inroads into China by Launching the Anti-hair loss line(July 2015)



Thank you for your attention

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Personal care research

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