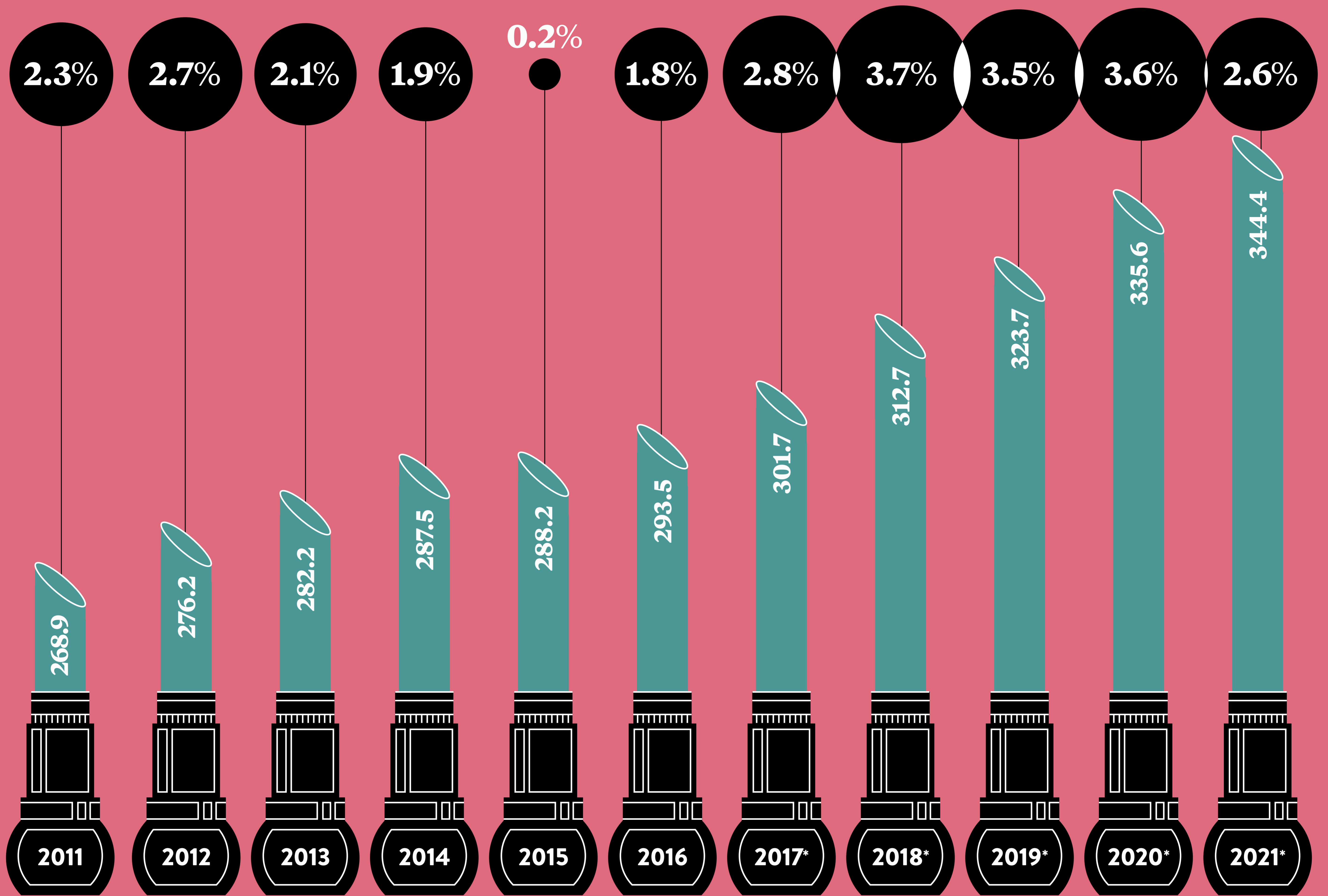


# GLOBAL COSMETICS MARKET

## GLOBAL COSMETICS MANUFACTURING INDUSTRY REVENUE

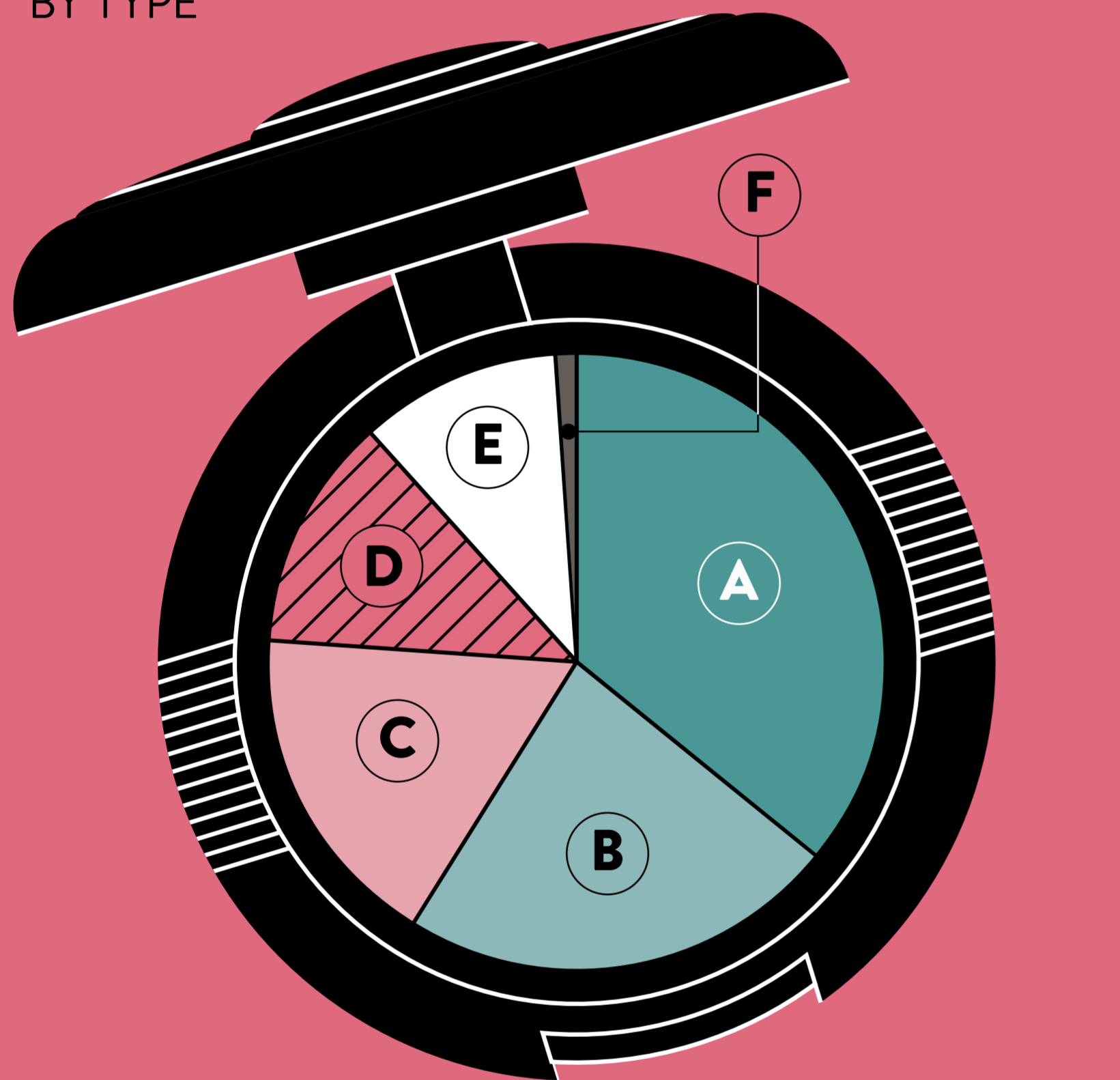
● Revenue (\$bn) ● Revenue growth



\*Forecast

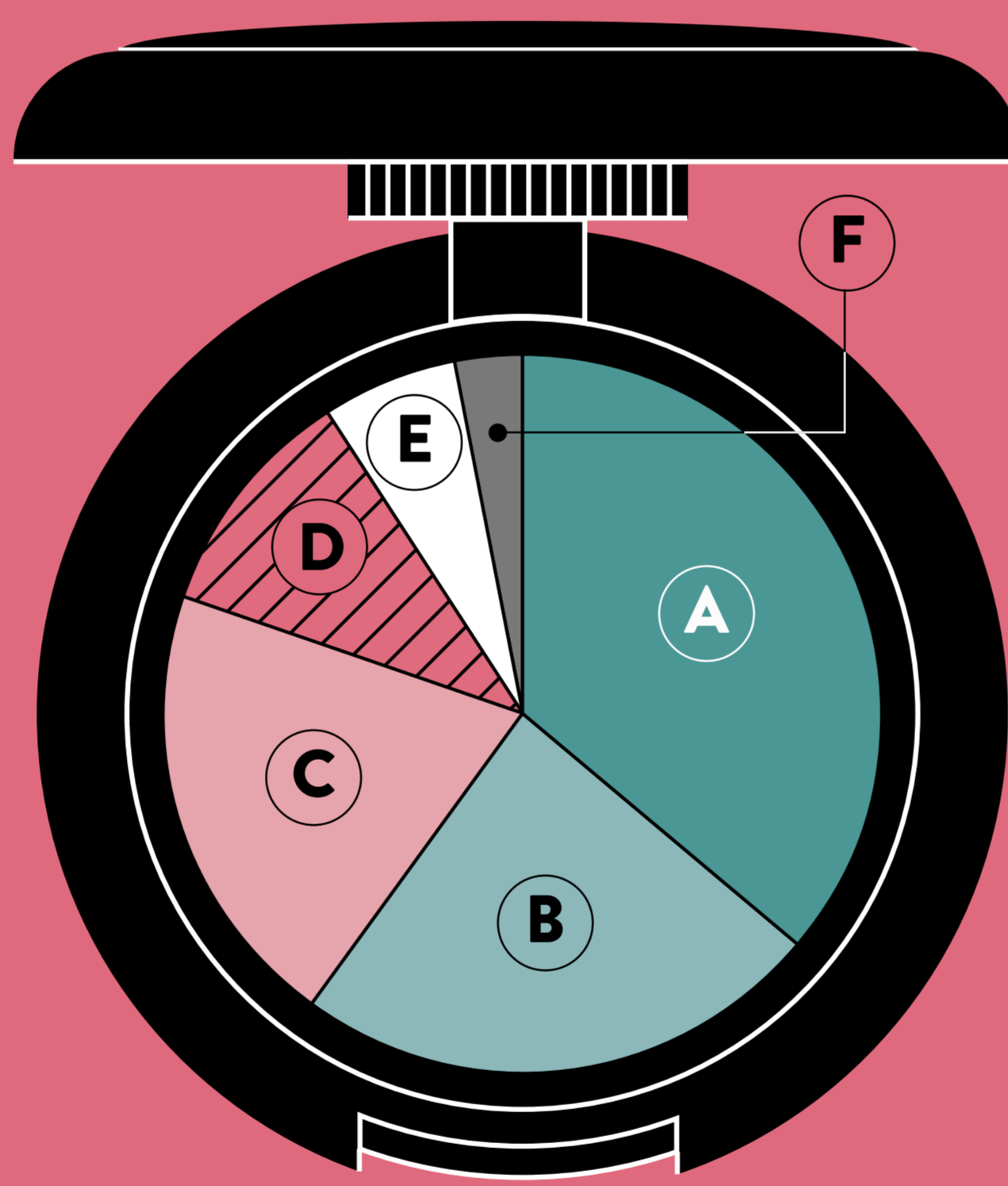
Source: IBISWorld 2016

## GLOBAL COSMETICS INDUSTRY BREAKDOWN BY TYPE



- A Skincare 36.1%
- B Haircare 22.9%
- C Make-up 17.3%
- D Fragrances 12.2%
- E Hygiene products 10.4%
- F Oral cosmetics 1.1%

## GLOBAL COSMETICS INDUSTRY MARKET SHARE BY REGION

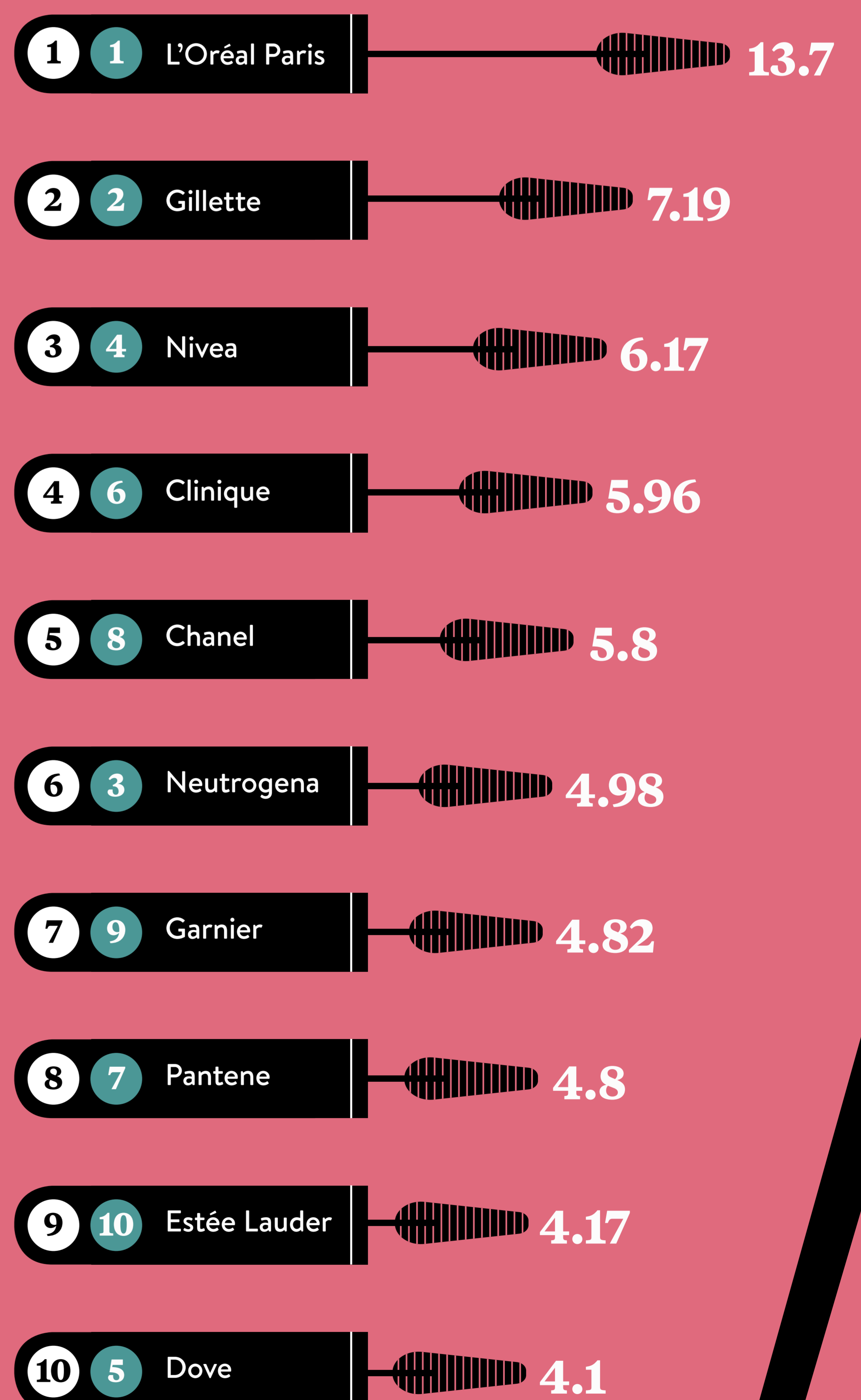


- A Asia-Pacific 36%
- B North America 24%
- C Western Europe 20%
- D Latin America 11%
- E Eastern Europe 6%
- F Africa and the Middle East 3%

Source: L'Oréal 2015

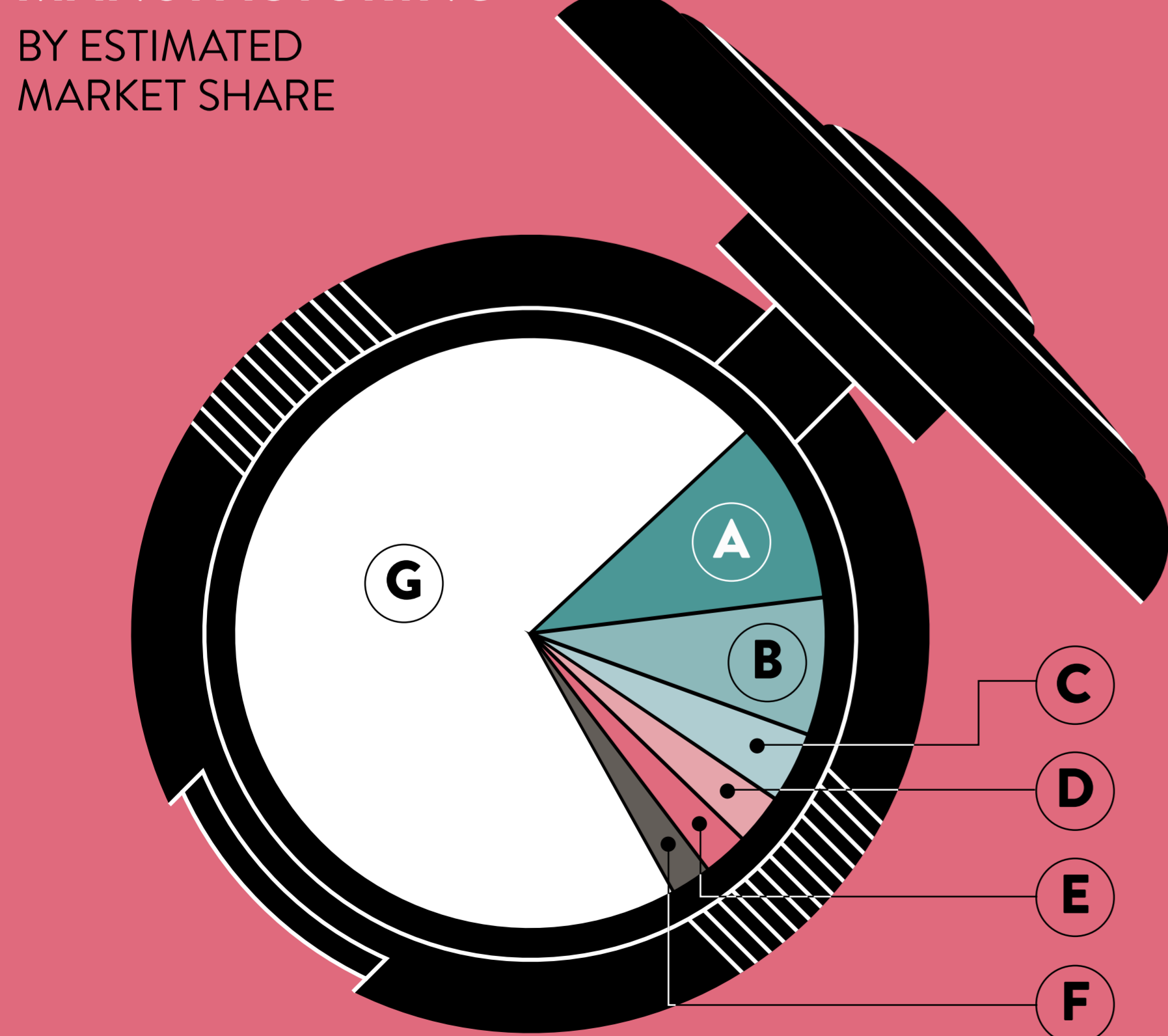
## TOP 10 MOST VALUABLE COSMETICS BRANDS BY BRAND VALUE AS DEFINED BY BRAND FINANCE

● 2016 rank ● 2015 rank — Brand value (\$bn)



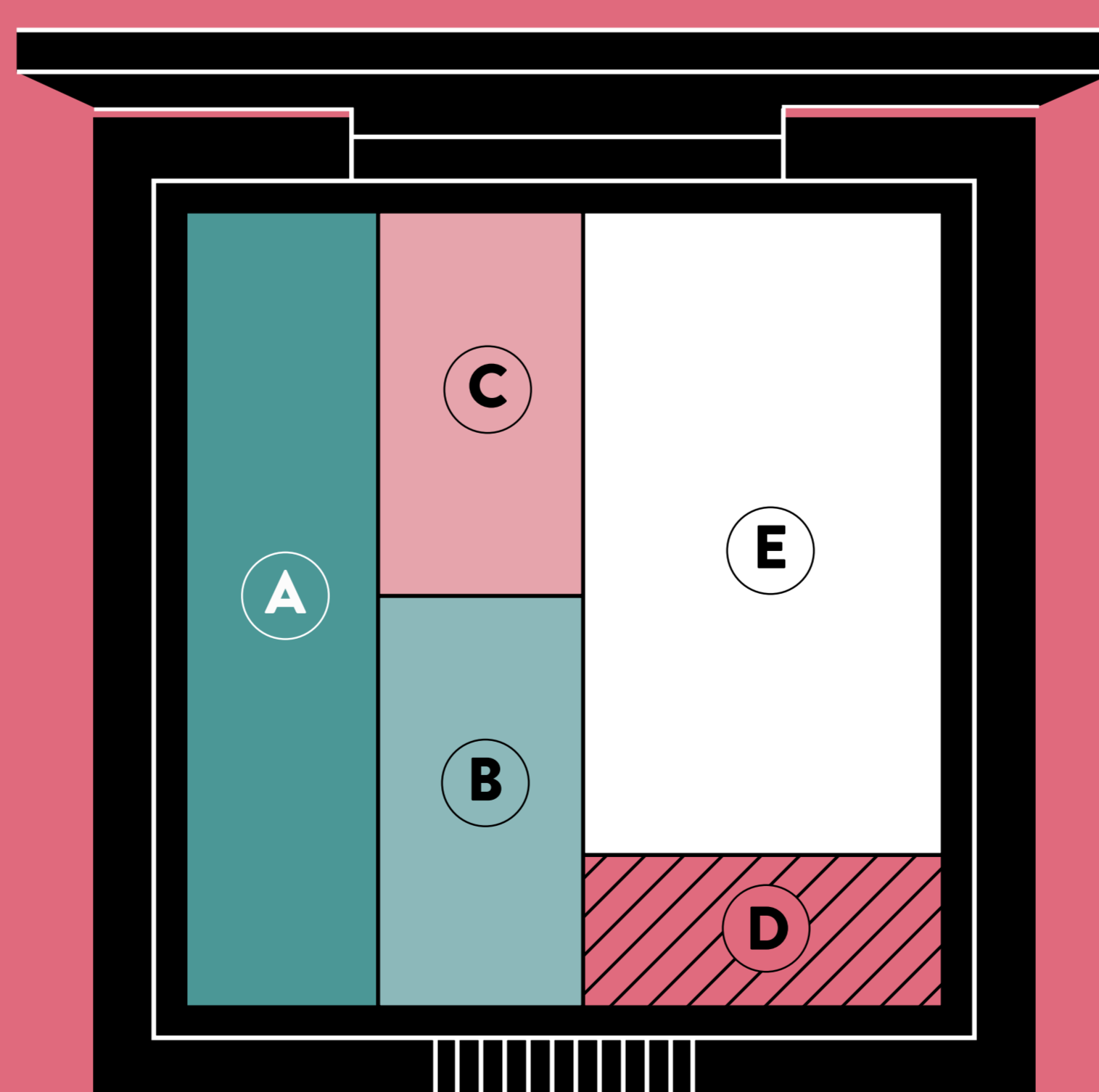
Source: Brand Finance 2016

## MAJOR PLAYERS IN COSMETICS MANUFACTURING BY ESTIMATED MARKET SHARE



- A L'Oréal 10.2%
- B Unilever 7.3%
- C Estée Lauder 4.1%
- D Shiseido 2.7%
- E Procter & Gamble 2.6%
- F Beiersdorf 2.1%
- G Other 71%

## GLOBAL COSMETICS BY CHANNEL



- A Grocery stores/supermarkets 26.9%
- B Specialty stores 13.4%
- C Pharmacies 12.8%
- D Department stores 9.5%
- E Other 37.4%

Source: IBISWorld 2016