

# Skincare Industry Research Report

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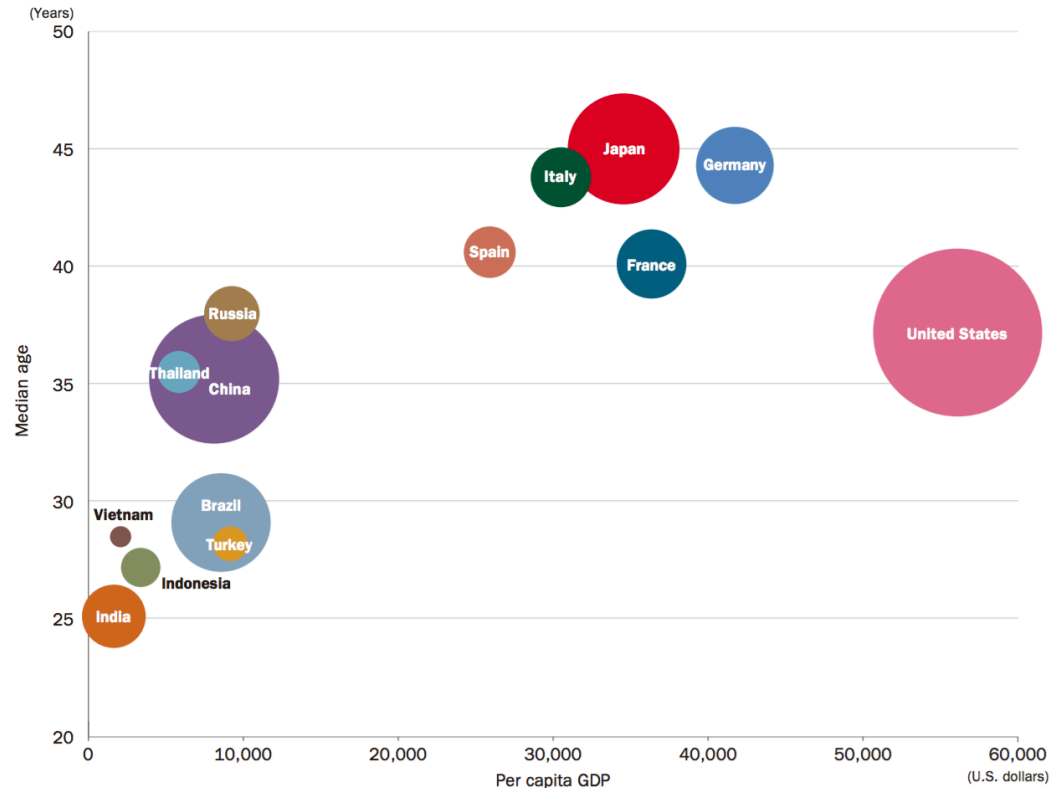
2017.05



# Global Beauty and Personal Care Markets Overview

## Beauty and Personal Care Markets by Country

Beauty and Personal Care Market Scale<sup>1</sup> by Country, Per Capita GDP and Median Age<sup>2</sup>



## Top Three Countries by Market Scale

United States  
China (mainland)  
Japan

Country	Beauty and Personal Care Market Scale (Millions of U.S. dollars)	Population (Millions)
United States	84,836	324
China (Excluding Hong Kong)	50,226	1,382
Japan	37,075	127



# Major Players

## Skincare in company total sales

**L'Oréal** 36.3%  
largest category in company sales

**Estée Lauder** 39.5%  
second largest category in company sales





# Robust Growth in the Global Skincare Industry

## Global Market and US Market

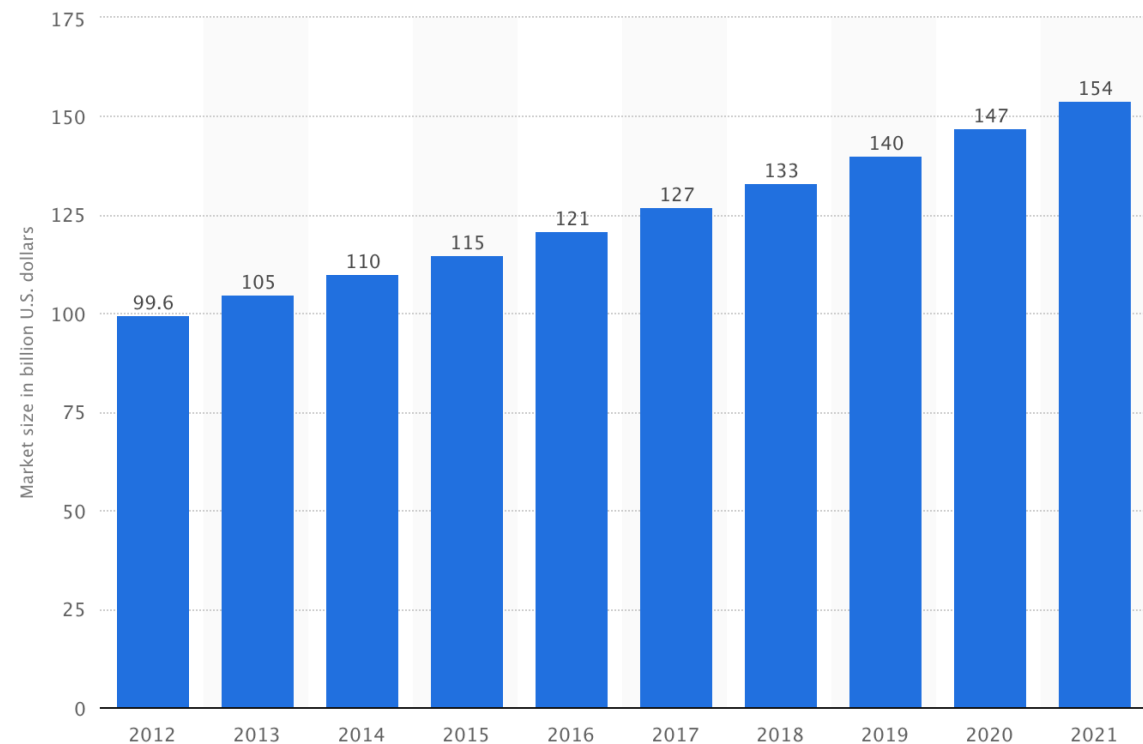
**Global**     \$121 billion (2016)  
CAGR        4.7% (2016-2022)

**U.S.**        \$11 Billion (by 2018)

## Market Share by Region

**No. 1**        Asia Pacific  
**No. 2**        North America

Size of the global skin care market from 2012 to 2021 (in billion U.S. dollars)\*





# Mergers and Acquisitions – Main Strategy

## M&A in the Beauty and Personal Care Industry - Inevitable trend

### Current situation

Top three companies:

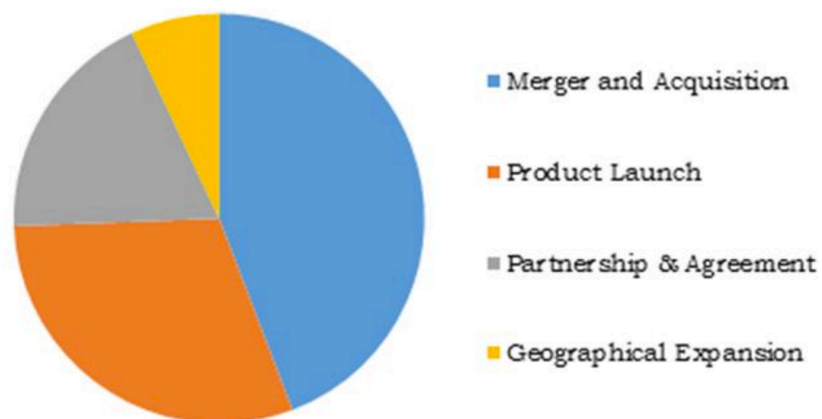
45% of market shares

27% in the skincare industry

### Result

Brands aim to add other brands to their company portfolios to gain market share

### Top Winning Strategies (2013-2016)



### The Four drivers of Beauty and Personal Care M&A

