



Passport

Hair Care in Singapore

Euromonitor International

May 2022

This sample report is for illustration
purposes only.

Some content and data have been
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HAIR CARE IN SINGAPORE - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Rise in demand for salon professional hair care products

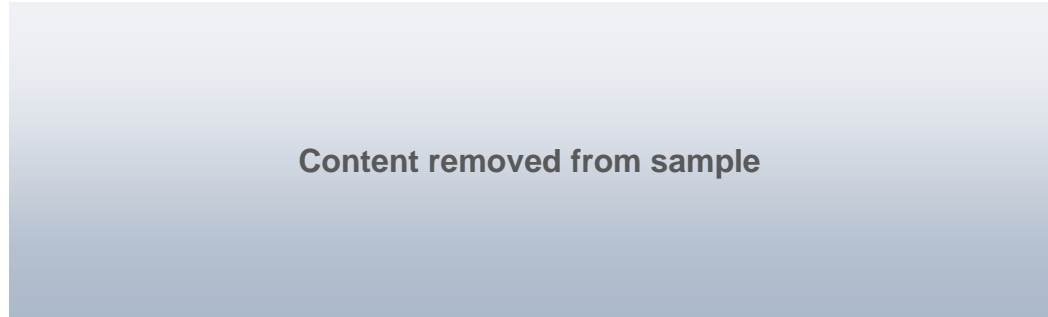
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Demand for colourants to slow down and stabilise

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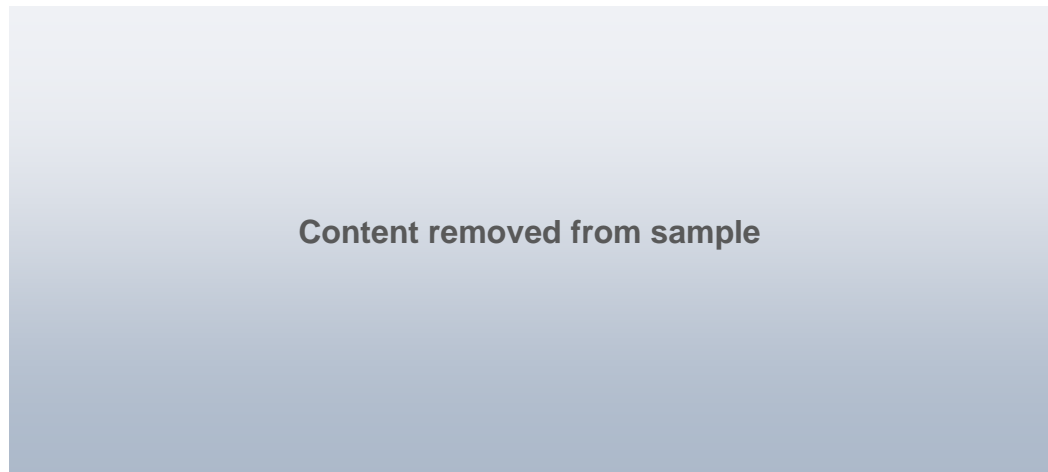


Easing of social restrictions leads to A boost in retail sales of styling agents

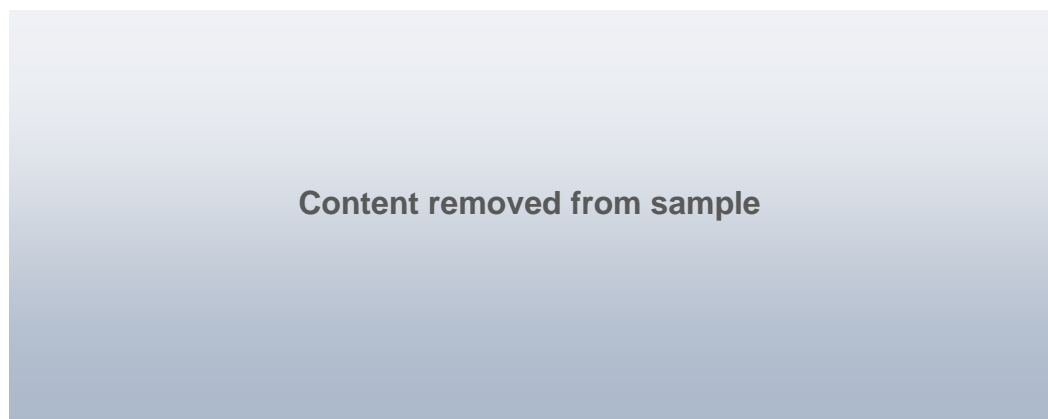


PROSPECTS AND OPPORTUNITIES

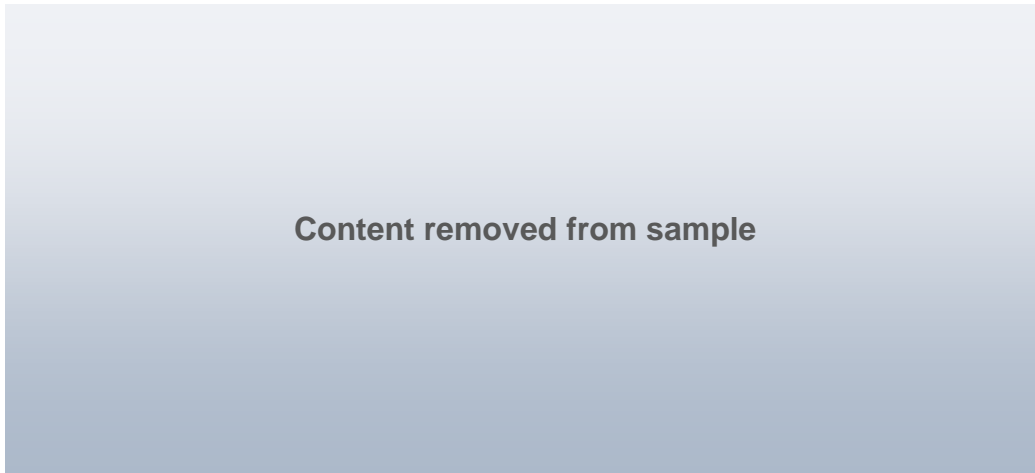
Hair loss has become A very common issue amongst Singaporeans



The sustainability trend also takes over the hair care category



Increasing popularity of Korean and Japanese hair care brands



CATEGORY DATA

Table 1 Sales of Hair Care by Category: Value 2016-2021

SGD million	2016	2017	2018	2019	2020	2021
2-in-1 Products	Data removed from sample					
Colourants						
Conditioners and Treatments						
Hair Loss Treatments						
Perms and Relaxants						
Salon Professional Hair Care						
Shampoos						
- Medicated Shampoos						
- Standard Shampoos						
Styling Agents						
Hair Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Hair Care by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
2-in-1 Products	Data removed from sample		
Colourants			
Conditioners and Treatments			
Hair Loss Treatments			
Perms and Relaxants			
Salon Professional Hair Care			
Shampoos			
- Medicated Shampoos			
- Standard Shampoos			

Styling Agents
Hair Care



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

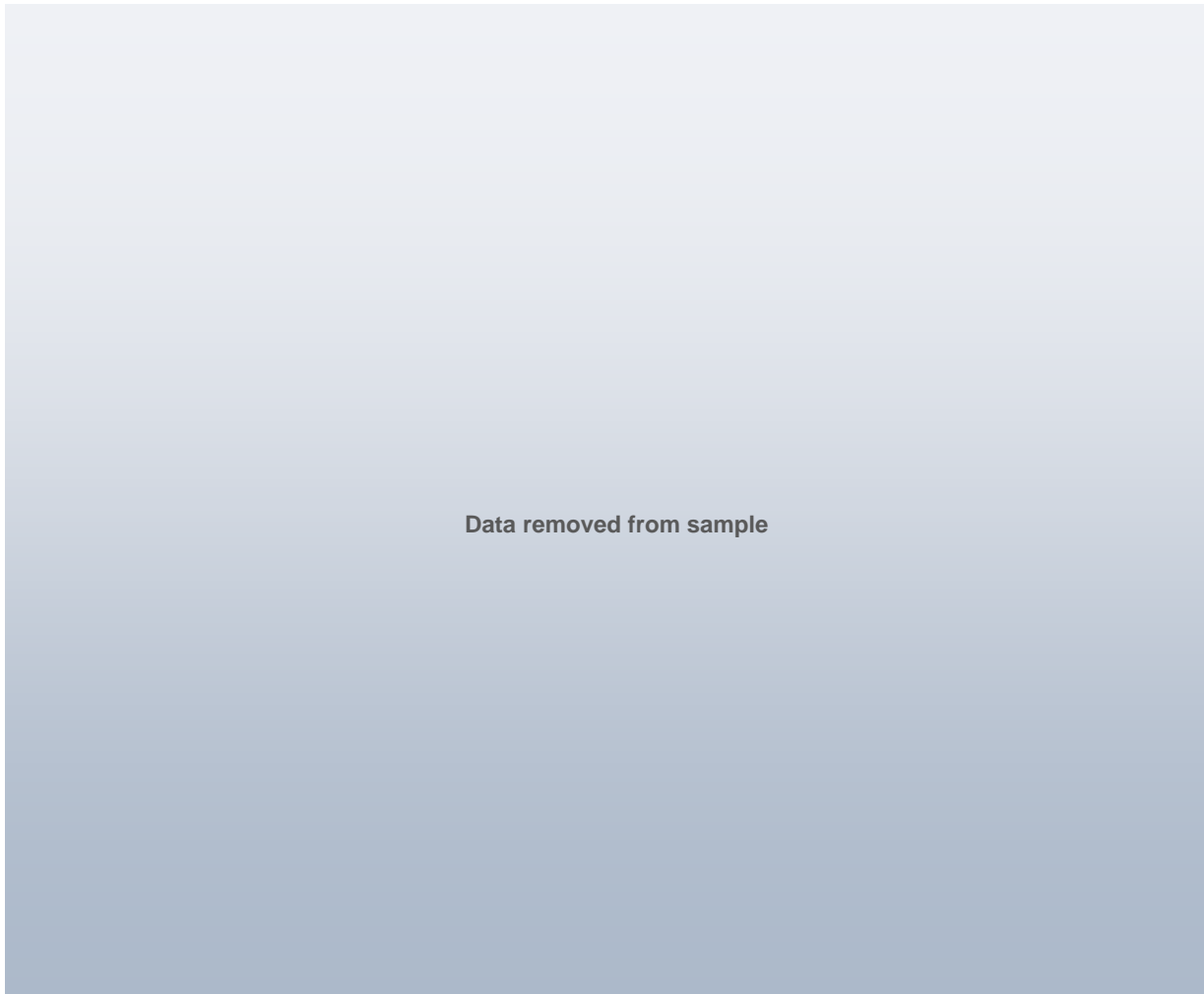
Table 3 Sales of Hair Care by Premium vs Mass: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Premium	Data removed from sample					
Mass						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 NBO Company Shares of Hair Care: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 NBO Company Shares of Salon Professional Hair Care: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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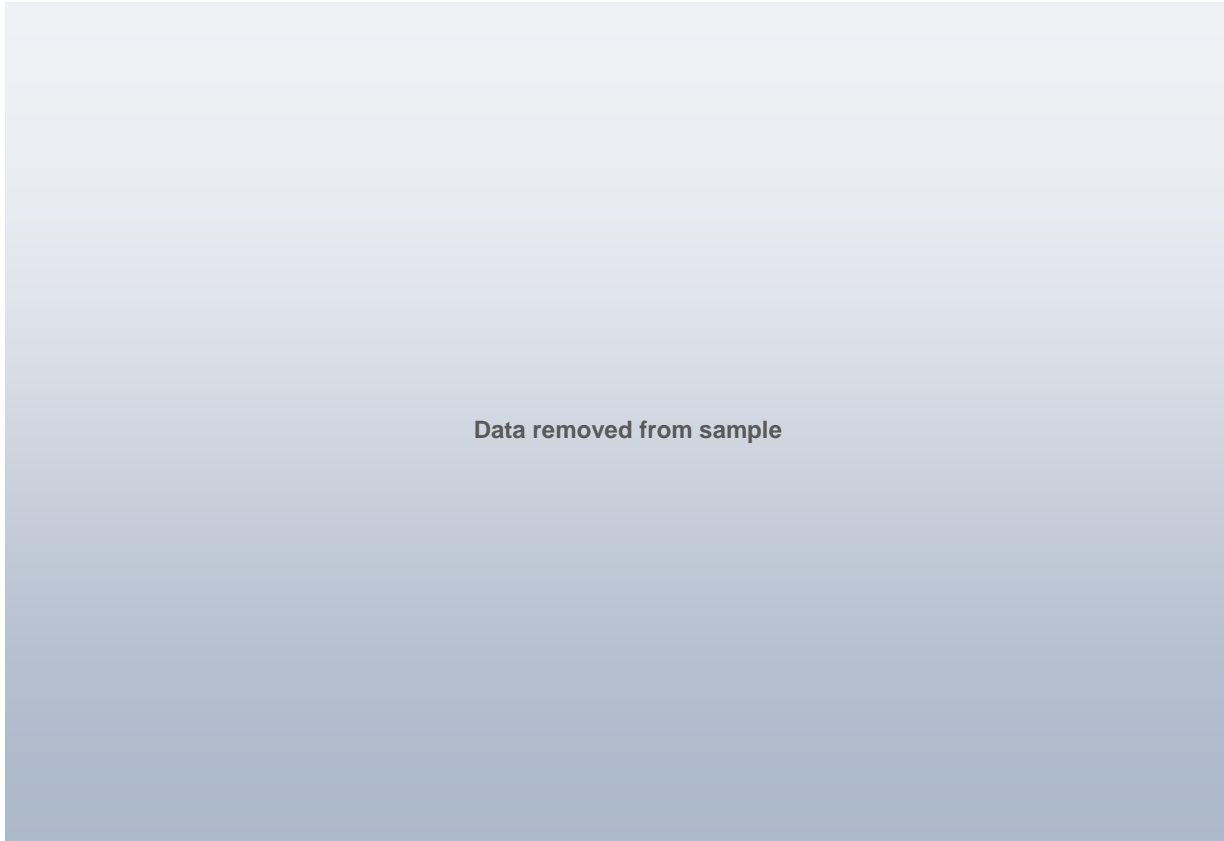
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Hair Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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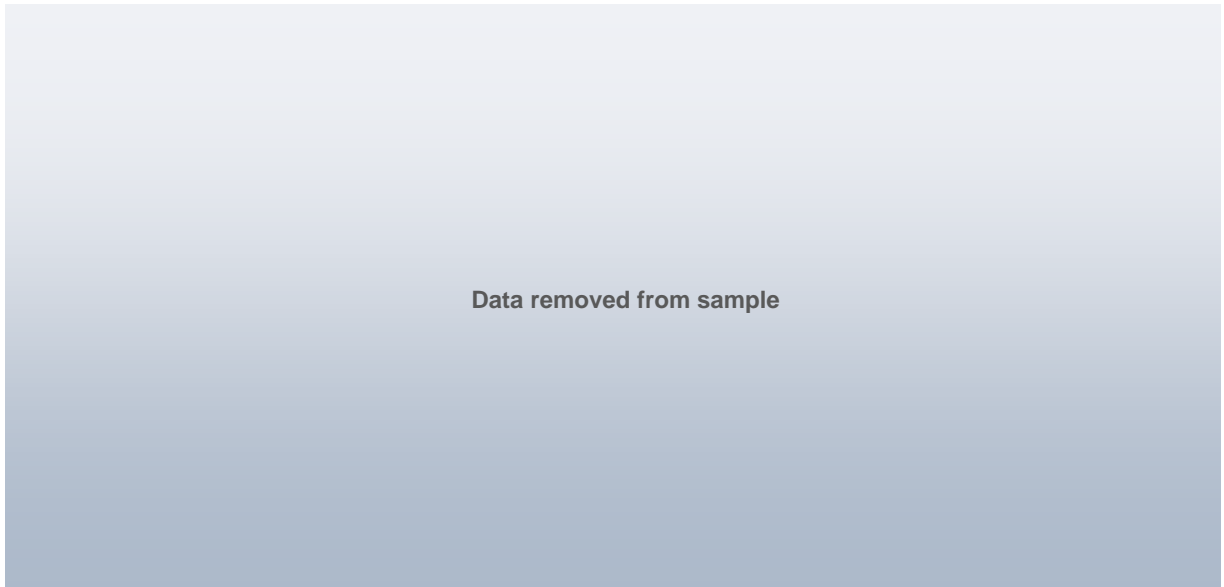
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 LBN Brand Shares of Colourants: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 LBN Brand Shares of Salon Professional Hair Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 LBN Brand Shares of Styling Agents: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 LBN Brand Shares of Premium Hair Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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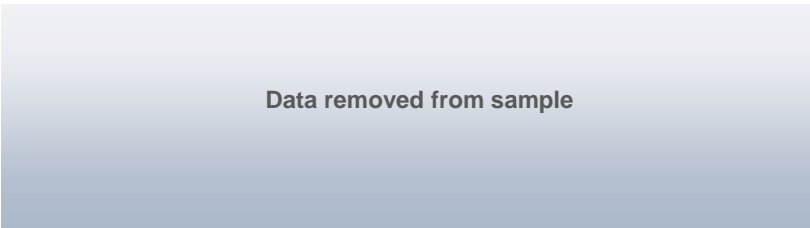
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 Forecast Sales of Hair Care by Category: Value 2021-2026

SGD million	2021	2022	2023	2024	2025	2026
-------------	------	------	------	------	------	------

2-in-1 Products	Data removed from sample					
Colourants						
Conditioners and Treatments						
Hair Loss Treatments						

Perms and Relaxants
 Salon Professional Hair Care
 Shampoos
 - Medicated Shampoos
 - Standard Shampoos
 Styling Agents
 Hair Care



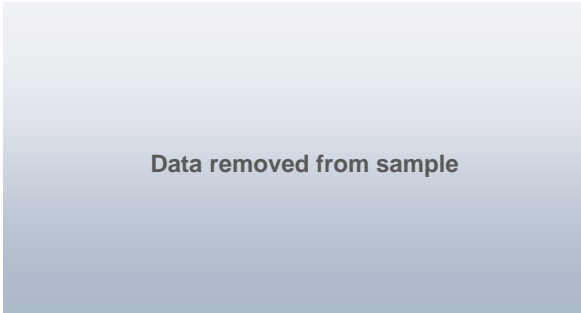
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 12 Forecast Sales of Hair Care by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

2-in-1 Products
 Colourants
 Conditioners and Treatments
 Hair Loss Treatments
 Perms and Relaxants
 Salon Professional Hair Care
 Shampoos
 - Medicated Shampoos
 - Standard Shampoos
 Styling Agents
 Hair Care



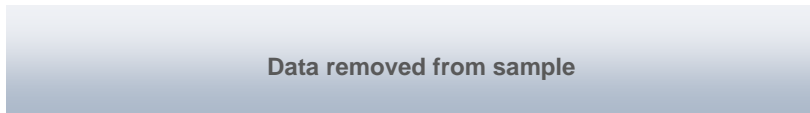
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 13 Forecast Sales of Hair Care by Premium vs Mass: % Value 2021-2026

% retail value rsp

2021 2022 2023 2024 2025 2026

Premium
 Mass
 Total

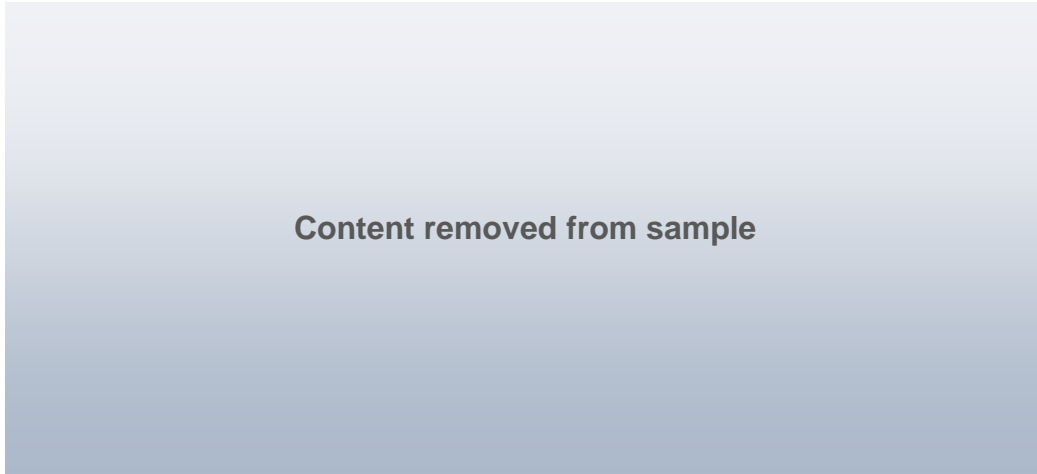


Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

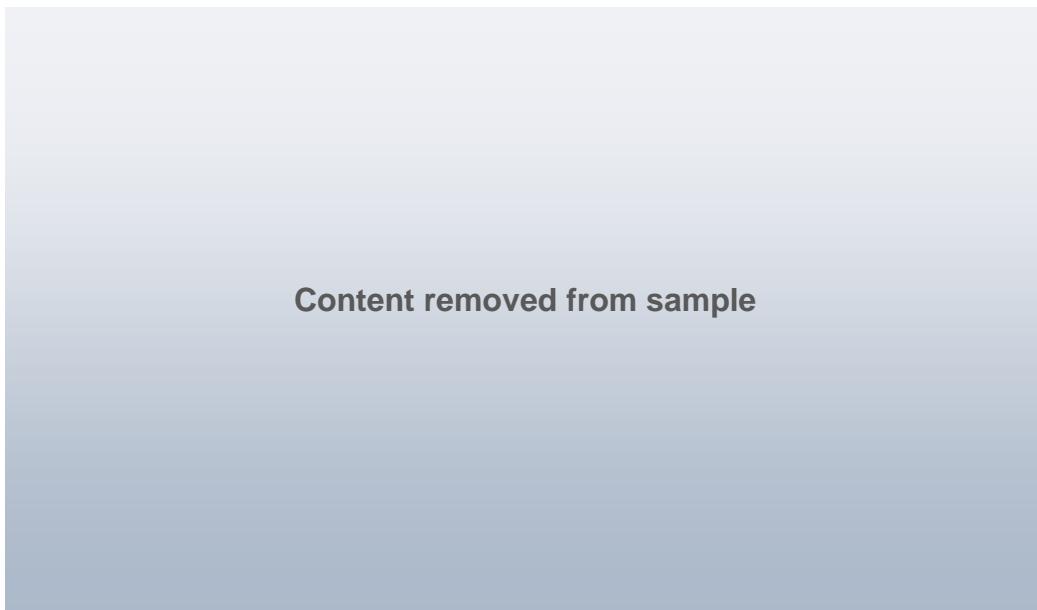
BEAUTY AND PERSONAL CARE IN SINGAPORE - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

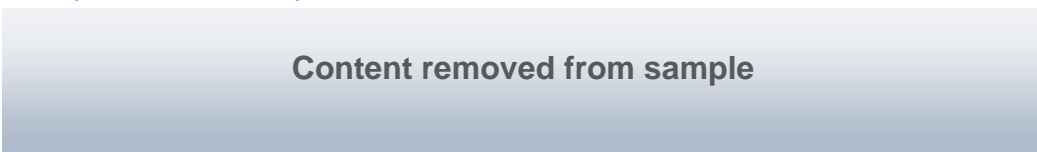
Beauty and personal care in 2021: The big picture



2021 key trends



Competitive landscape



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Retailing developments

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What next for beauty and personal care?

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Chart 1 Beauty and Personal Care Value Sales Growth Scenarios: 2019-2026

Retail Value Sales, Real, US\$ mn, 2019 - 2026

2021 Constant Prices, 2021 Fixed Year Exchange Rate

Beauty and Personal Care - Singapore

Passport Baseline C19 Pessimistic



Source: Euromonitor International

Note: C19 Pessimistic 1 represents a modelled scenario with an estimated probability of 25-35% over a 1-year horizon, factoring in macro drivers including GDP, stock prices, business and consumer confidence rates alongside infection rates, supply chain and labour supply disruption rates

Chart 2 Beauty and Personal Care Impact of Soft Drivers on Value Sales: 2019-2026

Retail Value Sales, Real US\$ mn 2019 - 2026

2021 Constant Prices, 2021 Fixed Year Exchange Rate

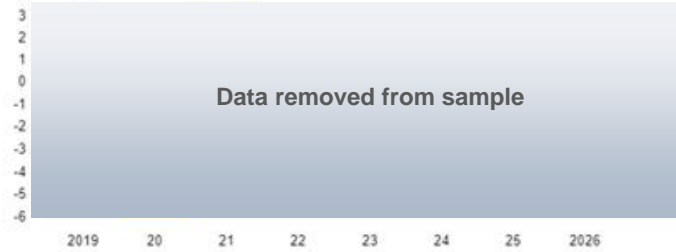
Singapore - Beauty and Personal Care

Retail Value Sales, Real Growth

Passport Baseline

Driver effects

- GDP Per Capita
- Product Price
- Habit Persistence
- Population
- Demographics
(Share of Female population Aged 15-44; Share of Female population Aged 15-64)
- Socio-Economic Trends
(Annual Disposable Income per Capita: Male; Female Employment Rate)
- Market Environment
(Beauty and Personal Care Direct Selling per Capita; Business Arrivals)
- Soft Drivers
(- Competition; + Availability; + Consumer awareness; + Product variety)



Source: Euromonitor International

Note: The above chart shows the growth decomposition split by macro drivers such as GDP per capita and population alongside soft drivers listed as having a positive (+) or negative (-) impact on the total growth rate

MARKET DATA

Table 14 Sales of Beauty and Personal Care by Category: Value 2016-2021

SGD million	2016	2017	2018	2019	2020	2021
Baby and Child-specific Products	Data removed from sample					
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Oral Care Excl Power Toothbrushes						
Skin Care						
Sun Care						
Premium Beauty and Personal Care						
Prestige Beauty and Personal Care						
Mass Beauty and Personal Care						
Dermocosmetics Beauty and Personal Care						

Beauty and Personal Care

- Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
- Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care
- Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, and baby and child-specific sun care categories

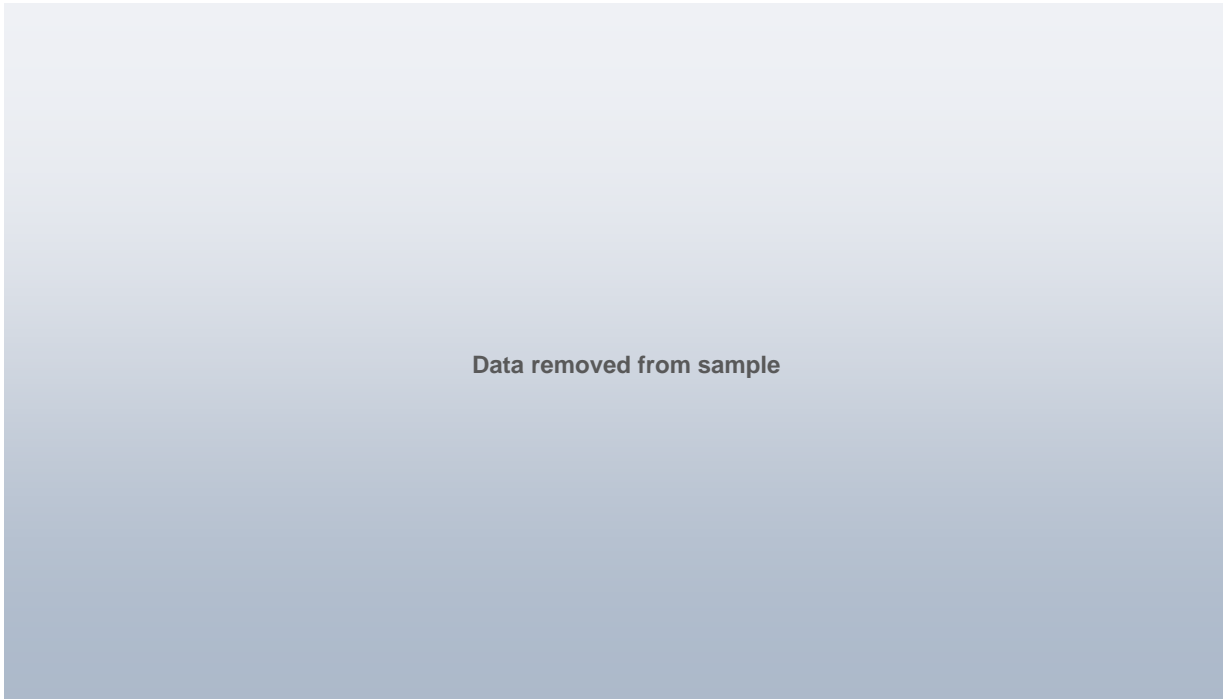
Table 15 Sales of Beauty and Personal Care by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Baby and Child-specific Products	Data removed from sample		
Bath and Shower			
Colour Cosmetics			
Deodorants			
Depilatories			
Fragrances			
Hair Care			
Men's Grooming			
Oral Care			
Oral Care Excl Power Toothbrushes			
Skin Care			
Sun Care			
Premium Beauty and Personal Care			
Prestige Beauty and Personal Care			
Mass Beauty and Personal Care			
Dermocosmetics Beauty and Personal Care			
Beauty and Personal Care			

- Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
- Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care
- Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's deodorants, and baby and child-specific sun care categories

Table 16 GBO Company Shares of Beauty and Personal Care: % Value 2017-2021

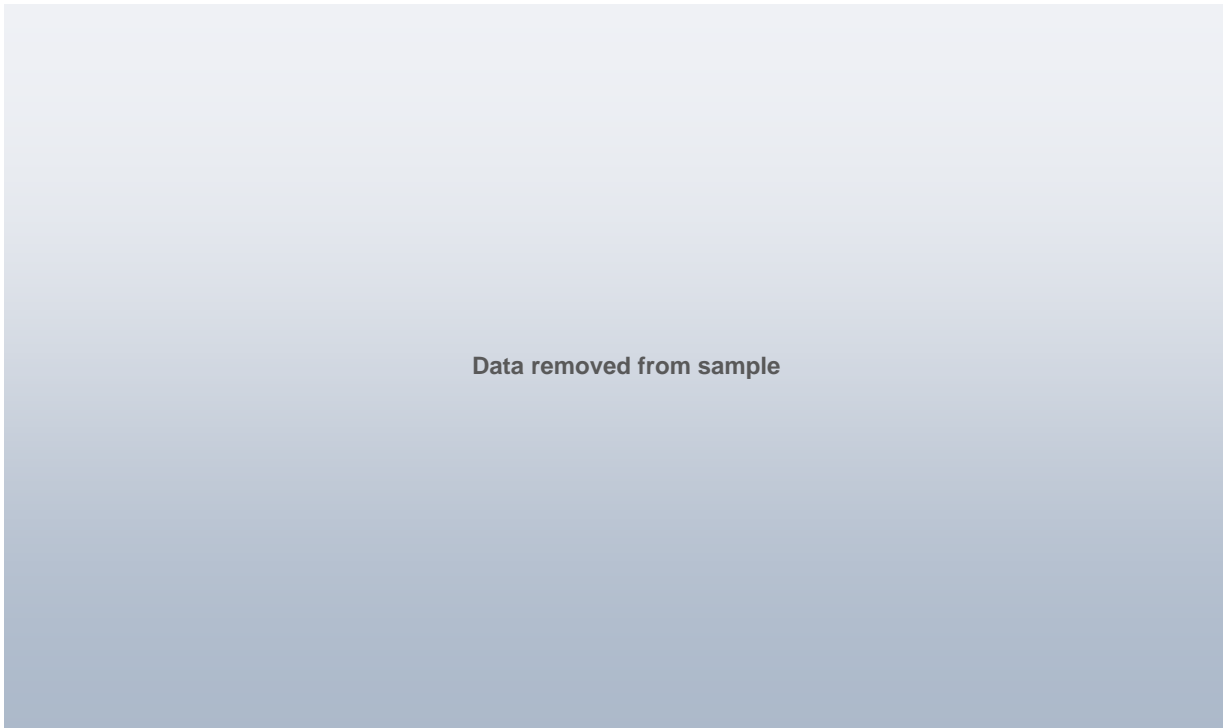
% retail value rsp	2017	2018	2019	2020	2021
Company	Data removed from sample				

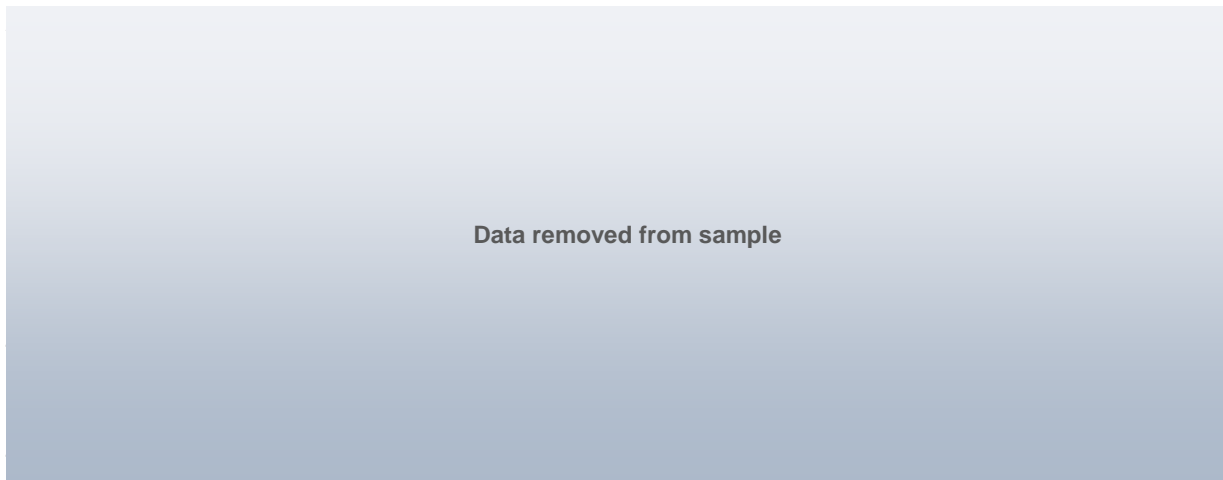


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 NBO Company Shares of Beauty and Personal Care: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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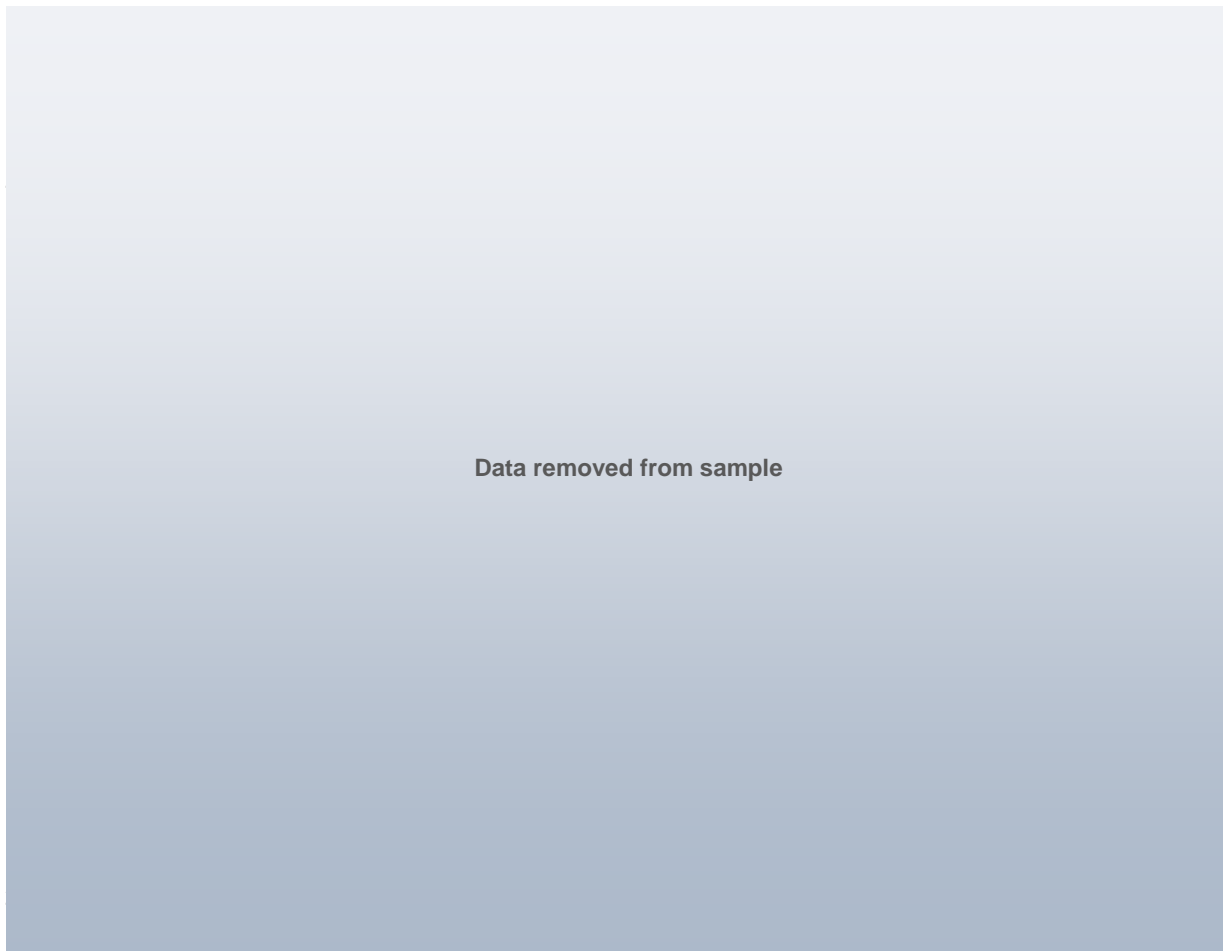


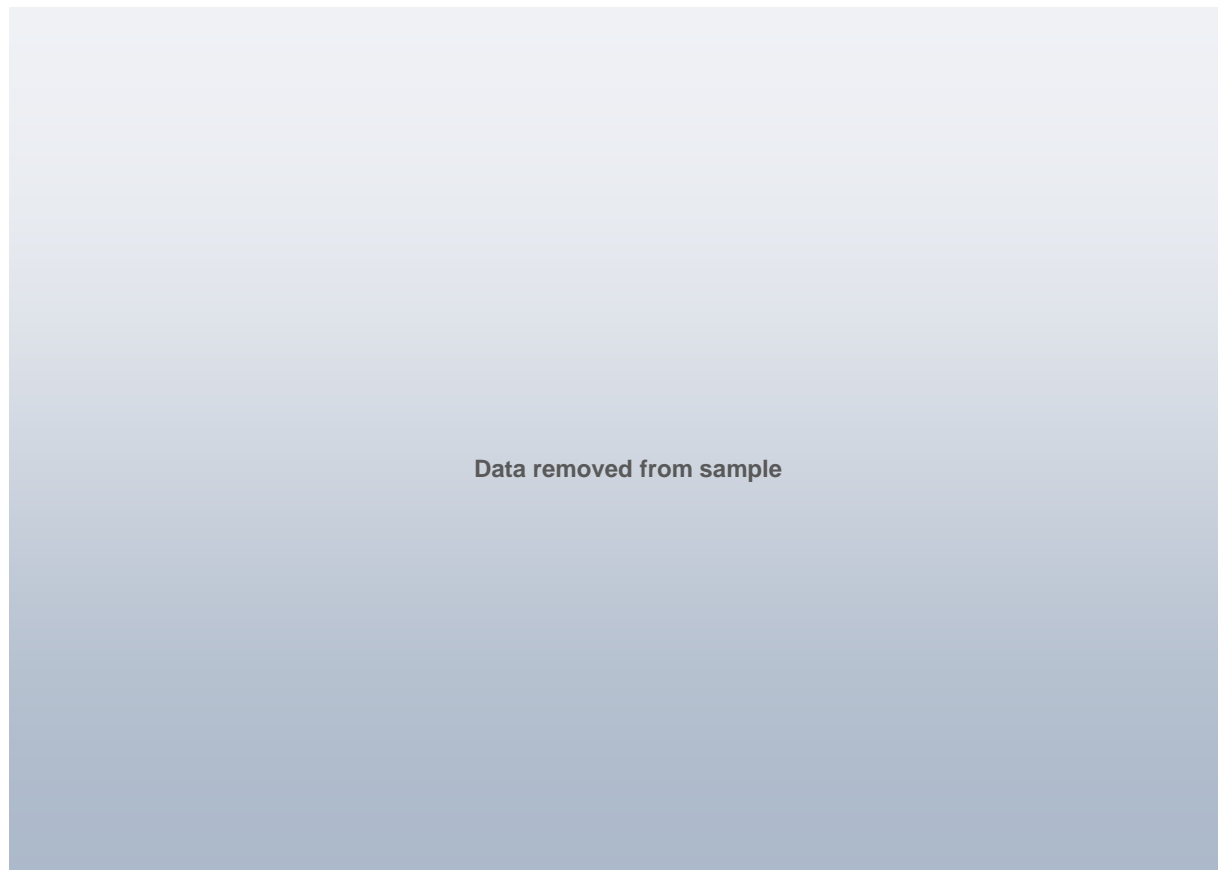


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 LBN Brand Shares of Beauty and Personal Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Penetration of Private Label in Beauty and Personal Care by Category: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Baby and Child-specific Products	Data removed from sample					
Bath and Shower						
Beauty and Personal Care						
Deodorants						
Depilatories						
Hair Care						
Mass Beauty and Personal Care						
Men's Grooming						
Oral Care						
Skin Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Distribution of Beauty and Personal Care by Format: % Value 2016-2021



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 Distribution of Beauty and Personal Care by Format and Category: % Value 2021

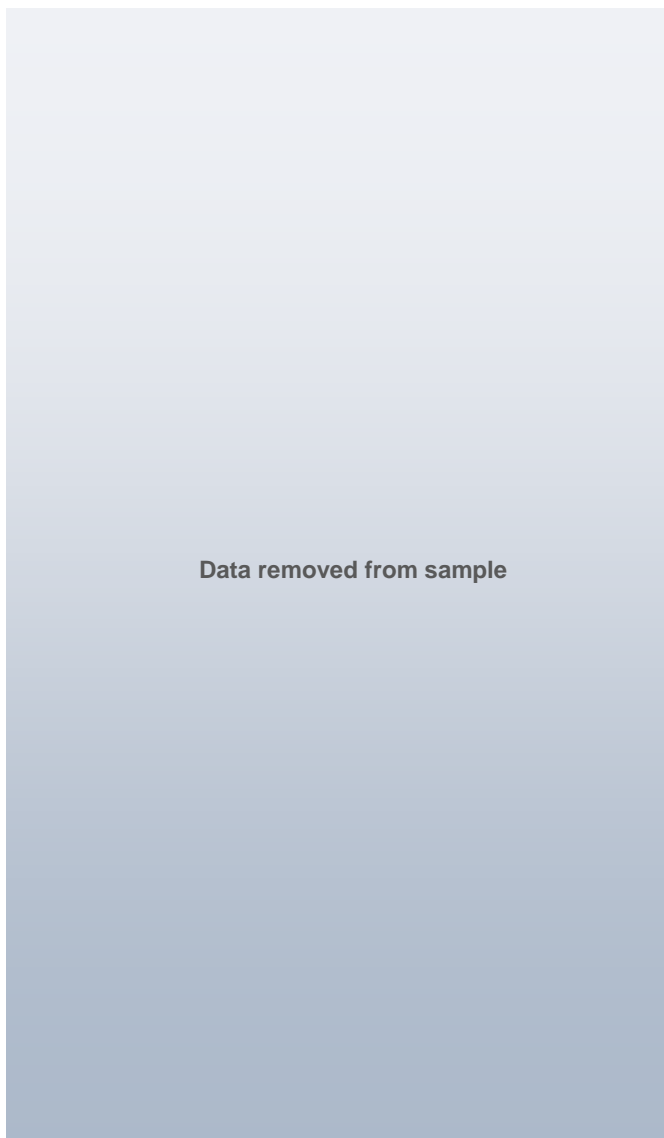
% retail value rsp	Baby and	Bath and	Colour Cosmetics	Deodorants	Depilatories	Fragrances



Hair Care Men's Grooming Oral Care Skin Care Sun Care



- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Non-Grocery Specialists
- Apparel and Footwear Specialists
- Appliances and Electronics Specialists
- Health and Beauty Specialist
- Beauty Specialists
- Chemists/Pharmacies
- Drugstores/parapharmacies
- Other BPC Health and Beauty Specialist Retailers
- Home and Garden Specialist Retailers
- Homewares and Home Furnishing Stores
- Other Non-Grocery Retailers
- Outdoor Markets
- Other BPC Non-Grocery Specialists
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Non-retail channels
- Hair Salons
- Total



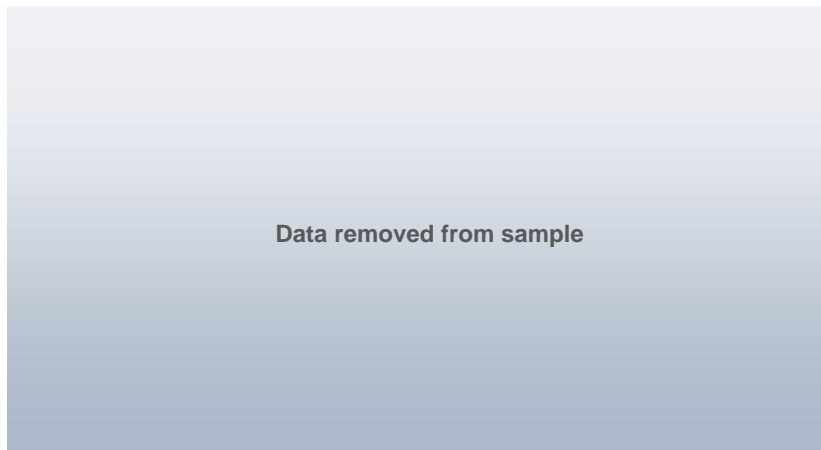
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: BC = baby and child-specific products; BS = bath and shower; CC = colour cosmetics; DO = deodorants; DP = depilatories; FR = fragrances; HC = hair care; MG = men's grooming; OC = oral care; SK = skin care; SU = sun care

Table 22 Forecast Sales of Beauty and Personal Care by Category: Value 2021-2026

SGD million	2021	2022	2023	2024	2025	2026
Baby and Child-specific Products	Data removed from sample					
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						

Hair Care
 Men's Grooming
 Oral Care
 Oral Care Excl Power
 Toothbrushes
 Skin Care
 Sun Care
 Premium Beauty and
 Personal Care
 Prestige Beauty and
 Personal Care
 Mass Beauty and
 Personal Care
 Dermocosmetics Beauty
 and Personal Care
 Beauty and Personal Care



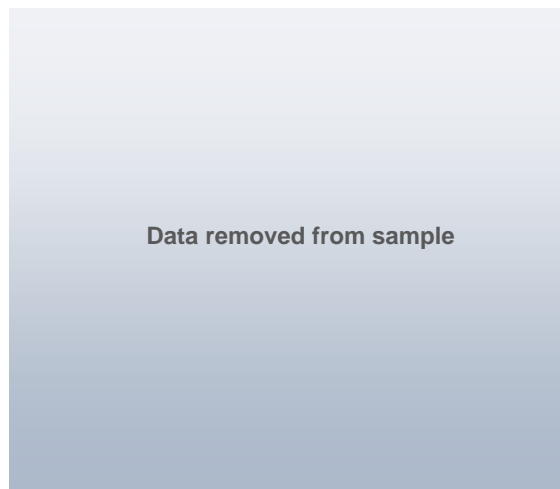
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
 Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care
 Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances and baby and child-specific sun care categories

Table 23 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

Baby and Child-specific Products
 Bath and Shower
 Colour Cosmetics
 Deodorants
 Depilatories
 Fragrances
 Hair Care
 Men's Grooming
 Oral Care
 Oral Care Excl Power Toothbrushes
 Skin Care
 Sun Care
 Premium Beauty and Personal Care
 Prestige Beauty and Personal Care
 Mass Beauty and Personal Care
 Dermocosmetics Beauty and Personal Care
 Beauty and Personal Care



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
 Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care
 Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances and baby and child-specific sun care categories

DISCLAIMER

Forecast and scenario closing date: 11 April 2022

Report closing date: 4 May 2022

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2021 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

Official Sources

Trade Press

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Source: Euromonitor International