



# Passport

## Sun Care in Indonesia

Euromonitor International

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# SUN CARE IN INDONESIA - CATEGORY ANALYSIS

## KEY DATA FINDINGS

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## 2021 DEVELOPMENTS

COVID-19 crisis dampens performance of sun care

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Gradual improvement

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### Nivea Sun still rises above the rest



## PROSPECTS AND OPPORTUNITIES

### Mass sun care products still the major contributor



### Female population driving growth



## Comfort becomes more important in sun care as competition from skin care grows



### CATEGORY DATA

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

IDR billion

	2016	2017	2018	2019	2020	2021
Baby and Child-specific Sun Care	<b>Data removed from sample</b>					
-- --Mass Sun Protection						
-- Premium Sun Protection						
Sun Protection						
-- Mass Self-Tanning						
-- Premium Self-Tanning						
Self-Tanning						
-- Mass Aftersun						
-- Premium Aftersun						
-Aftersun						
Adult Sun Care						
Sun Care						

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

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

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Baby and Child-specific Sun Care	<b>Data removed from sample</b>		
-- Mass Sun Protection			
-- Premium Sun Protection			
- Sun Protection			
- -- Mass Self-Tanning			
-- Premium Self-Tanning			
- Self-Tanning			
-- Mass Aftersun			
-- Premium Aftersun			
- Aftersun			
Adult Sun Care			
Sun Care			

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

**Table 3 NBO Company Shares of Sun Care: % Value 2017-2021**

% retail value rsp

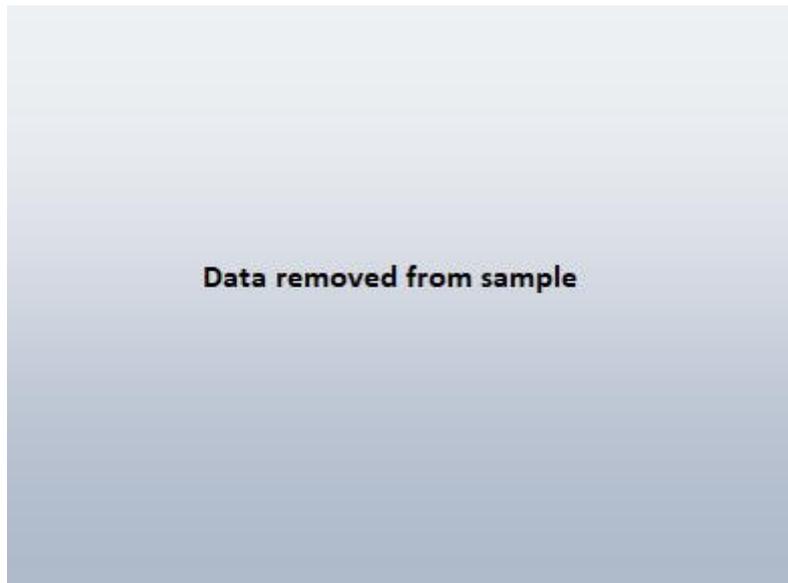
Company	2017	2018	2019	2020	2021
<b>Data removed from sample</b>					

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

**Table 4 LBN Brand Shares of Sun Care: % Value 2018-2021**

% retail value rsp

Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-------------	---------------	------	------	------	------

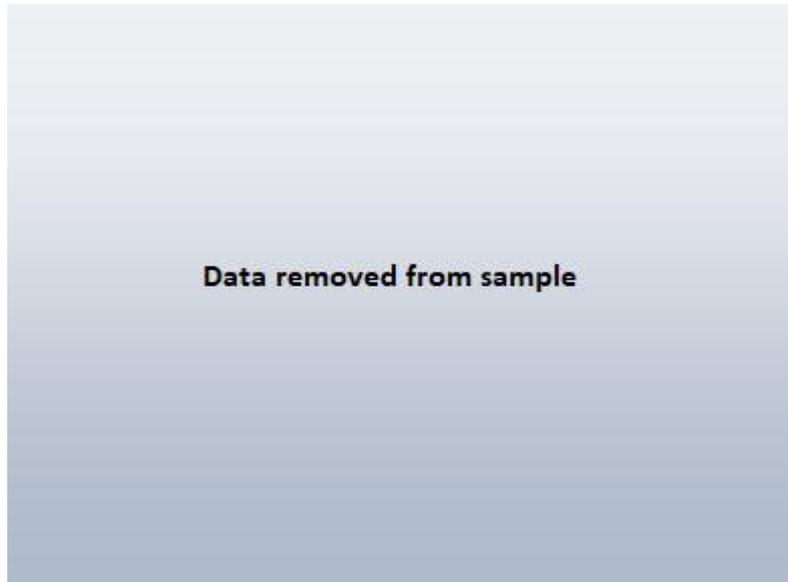


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5 LBN Brand Shares of Premium Adult Sun Care: % Value 2018-2021**

% retail value rsp

Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-------------	---------------	------	------	------	------



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

**Table 6 Forecast Sales of Sun Care by Category: Value 2021-2026**

IDR billion

	2021	2022	2023	2024	2025	2026
Baby and Child-specific						
Sun Care						
-- Mass Sun Protection						
-- Premium Sun Protection						
- Sun Protection						
- -- Mass Self-Tanning						
-- Premium Self-Tanning						
- Self-Tanning						
-- Mass Aftersun						
-- Premium Aftersun						
- Aftersun						
Adult Sun Care						

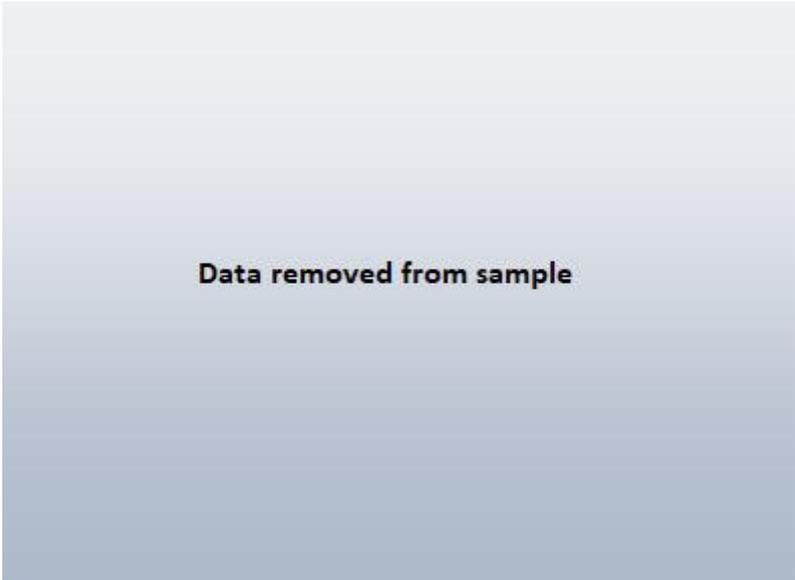
Sun Care

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

**Table 7 Forecast Sales of Sun Care by Category: % Value Growth 2021-2026**

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Baby and Child-specific Sun Care			
-- Mass Sun Protection			
-- Premium Sun Protection			
- Sun Protection			
-- Mass Self-Tanning			
-- Premium Self-Tanning			
- Self-Tanning			
-- Mass Aftersun			
-- Premium Aftersun			
- Aftersun			
Adult Sun Care			
Sun Care			

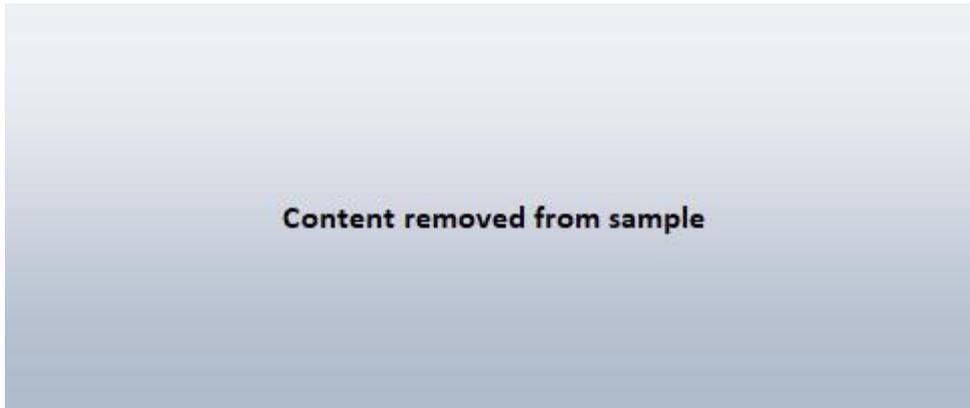


Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# BEAUTY AND PERSONAL CARE IN INDONESIA - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

Beauty and personal care in 2021: The big picture



2021 key trends



Competitive landscape



## Retailing developments



## What next for beauty and personal care?



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



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



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

IDR billion

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

### 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 9 Sales of Beauty and Personal Care by Category: % Value Growth 2016-2021**

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Dermocosmetics Beauty and Personal Care			
Mass Beauty and Personal Care			
Prestige Beauty and Personal Care			
Premium Beauty and Personal Care			
Sun Care			
Skin Care			
Oral Care Excl Power Toothbrushes			
Oral Care			
Men's Grooming			
Hair Care			
Fragrances			
Depilatories			
Deodorants			
Colour Cosmetics			
Bath and Shower			
Baby and Child-specific Products			
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 10 GBO Company Shares of Beauty and Personal Care: % Value 2017-2021

% retail value rsp

Company	2017	2018	2019	2020	2021
---------	------	------	------	------	------

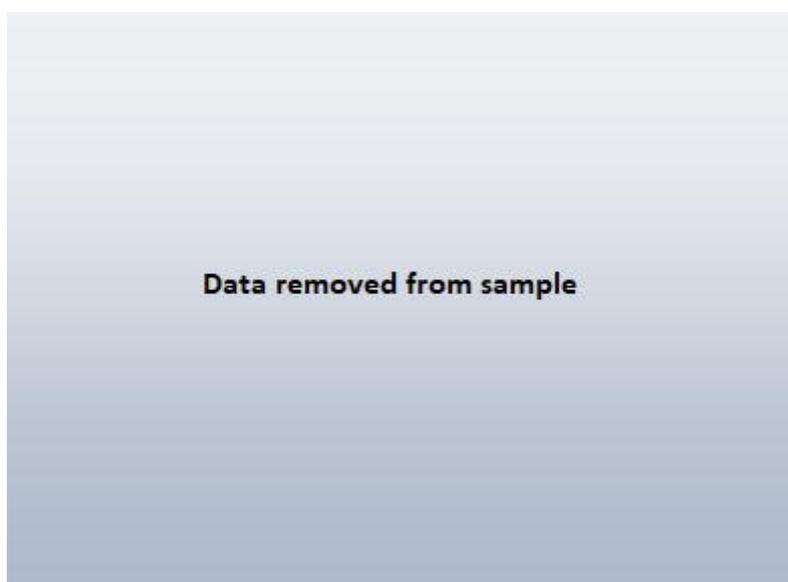


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Beauty and Personal Care: % Value 2017-2021

% retail value rsp

Company	2017	2018	2019	2020	2021
---------	------	------	------	------	------



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

**Table 12 LBN Brand Shares of Beauty and Personal Care: % Value 2018-2021**

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



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

**Table 13 Distribution of Beauty and Personal Care by Format: % Value 2016-2021**

% retail value rsp						
	2016	2017	2018	2019	2020	2021

## Store-Based Retailing

### Grocery Retailers

- Modern Grocery

  - Retailers

  - Convenience Stores

  - Discounters

  - Forecourt Retailers

  - Hypermarkets

  - Supermarkets

- Traditional Grocery

  - Retailers

- Non-Grocery Specialists

- Apparel and Footwear

  - Specialists

- Appliances and

  - Electronics Specialists

- Health and Beauty

  - Specialists

  - Beauty Specialists

  - Chemists/Pharmacies

  - Drugstores/

    - parapharmacies

  - Other BPC Health

    - and Beauty Specialist

    - Retailers

- Home and Garden

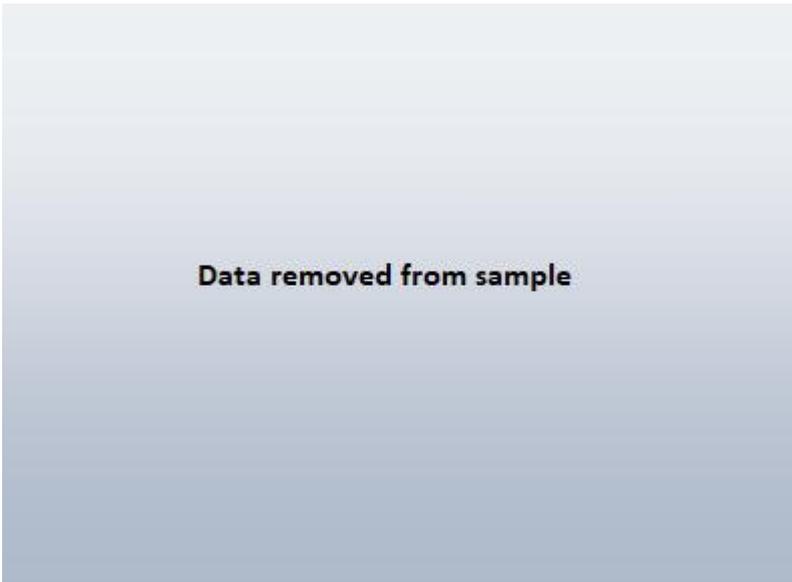
  - Specialist Retailers

  - Homewares and Home

    - Furnishing Stores

- Other Non-Grocery

  - Retailers



**Data removed from sample**

- 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

Table 14 Distribution of Beauty and Personal Care by Format and Category: % Value 2021

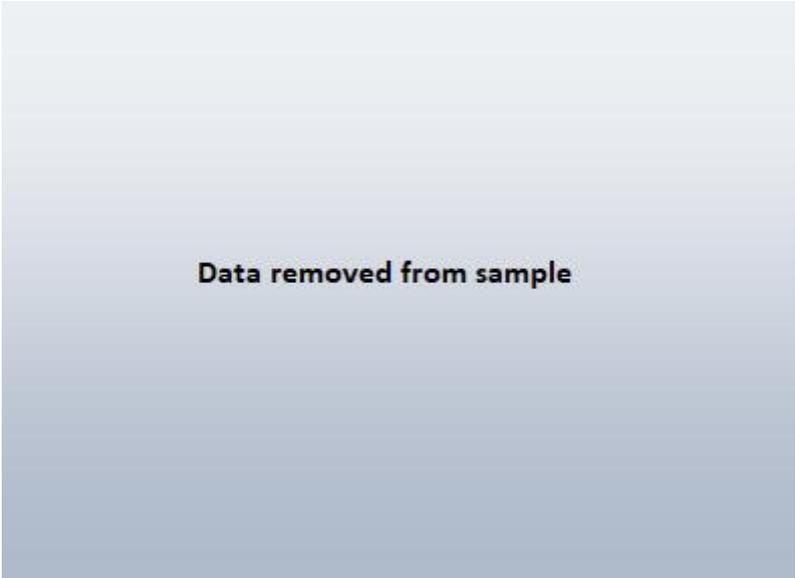
% retail value rsp

Baby and Child- specific	Bath and Shower	Colour Cosmetics	Deodoran ts	Depilato ries	Fragranc es
-----------------------------------	-----------------------	---------------------	----------------	------------------	----------------

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery



- Retailers
  - Convenience Stores
  - Discounters
  - Forecourt Retailers
  - Hypermarkets
  - Supermarkets
  - Traditional Grocery Retailers
- Non-Grocery Specialists
  - Apparel and Footwear Specialists
  - Appliances and Electronics Specialists
  - Health and Beauty Specialists
    - 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



**Data removed from sample**

- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Non-retail channels
- Hair Salons
- Total



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

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Supermarkets
- Traditional Grocery Retailers
- Non-Grocery Specialists
- Apparel and Footwear Specialists
- Appliances and Electronics Specialists
- Health and Beauty



- Specialists
- 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 15 Forecast Sales of Beauty and Personal Care by Category: Value 2021-2026**

IDR billion	2021	2022	2023	2024	2025	2026
Dermocosmetics Beauty and Personal Care						
Mass Beauty and Personal Care						
Prestige Beauty and Personal Care						
Premium Beauty and Personal Care						
Sun Care						
Skin Care						
Oral Care Excl Power Toothbrushes						
Oral Care						
Men's Grooming						
Hair Care						
Fragrances						
Depilatories						
Deodorants						
Colour Cosmetics						
Bath and Shower						
Baby and Child-specific Products						
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 16 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2021-2026**

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Dermocosmetics Beauty and Personal Care			
Mass Beauty and Personal Care			
Prestige Beauty and Personal Care			
Premium Beauty and Personal Care			
Sun Care			
Skin Care			
Oral Care Excl Power Toothbrushes			
Oral Care			
Men's Grooming			
Hair Care			
Fragrances			
Depilatories			
Deodorants			
Colour Cosmetics			
Bath and Shower			
Baby and Child-specific Products			
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

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## SOURCES

Sources used during the research included the following:

### Summary 1    Research Sources

Trade Associations

Trade Press

**Content removed from sample**

Source: Euromonitor International