

VIETNAMESE BEAUTY DISCOVERY

POTENTIAL FOR BEAUTY PRODUCTS



80%

*urban shoppers
pick at least 1
beauty product**



1/4

*wallet of Personal
Care is saved for
beauty products*

Spend **more** year by year
for beauty categories



Value growth
2015 vs YA

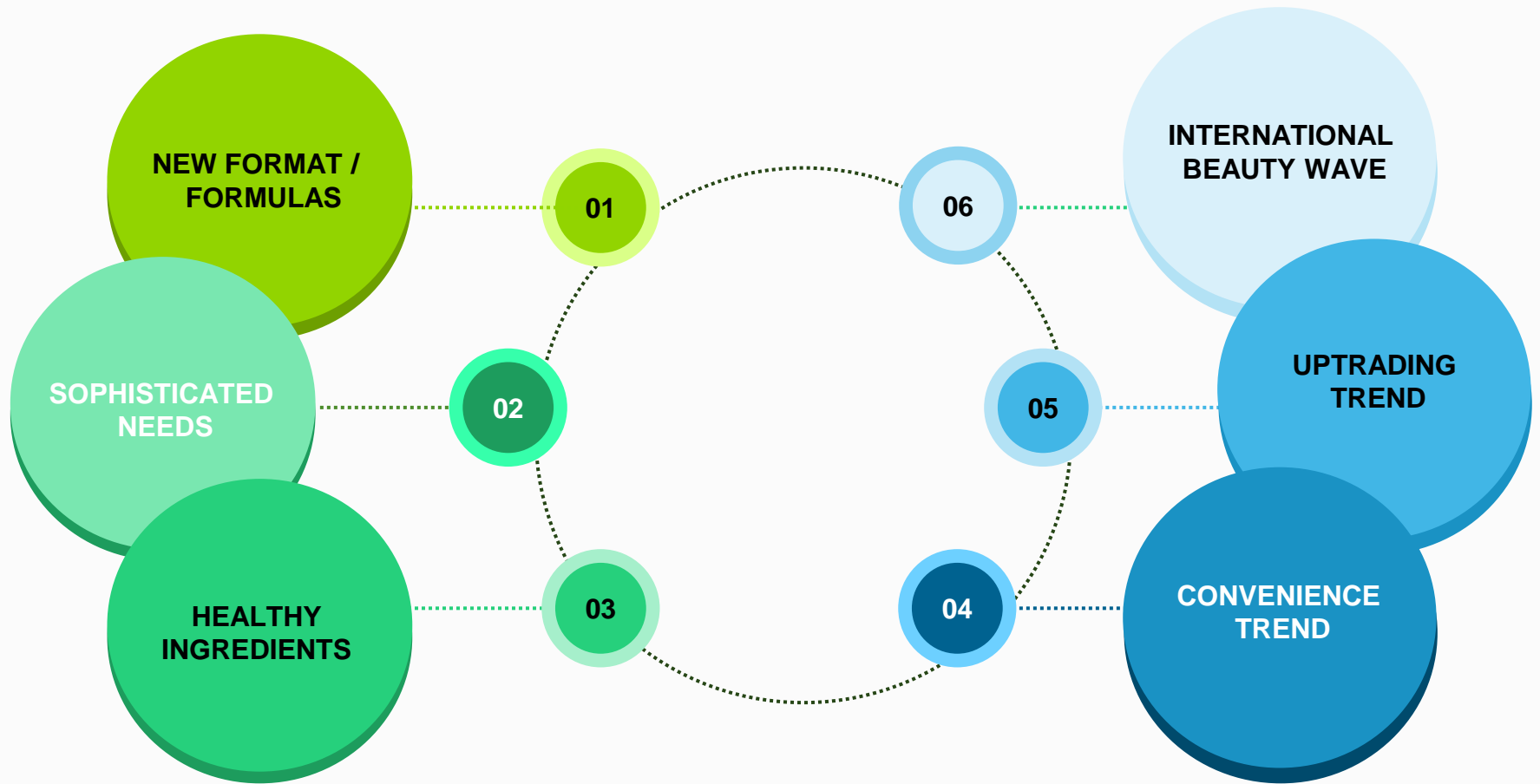


Value growth
2016 vs YA

** Beauty products: Hair Conditioner, Hair Colorant, Hair Styling, Facial Moisturizer, Facial Wash, Cosmetic remover, Mask, Toner/Astringent, Lip Make-Up, Eye Make-Up, Face Make-Up, Nail Make-Up, Hand & Body care, Sun protection, Deodorant, Fragrance*

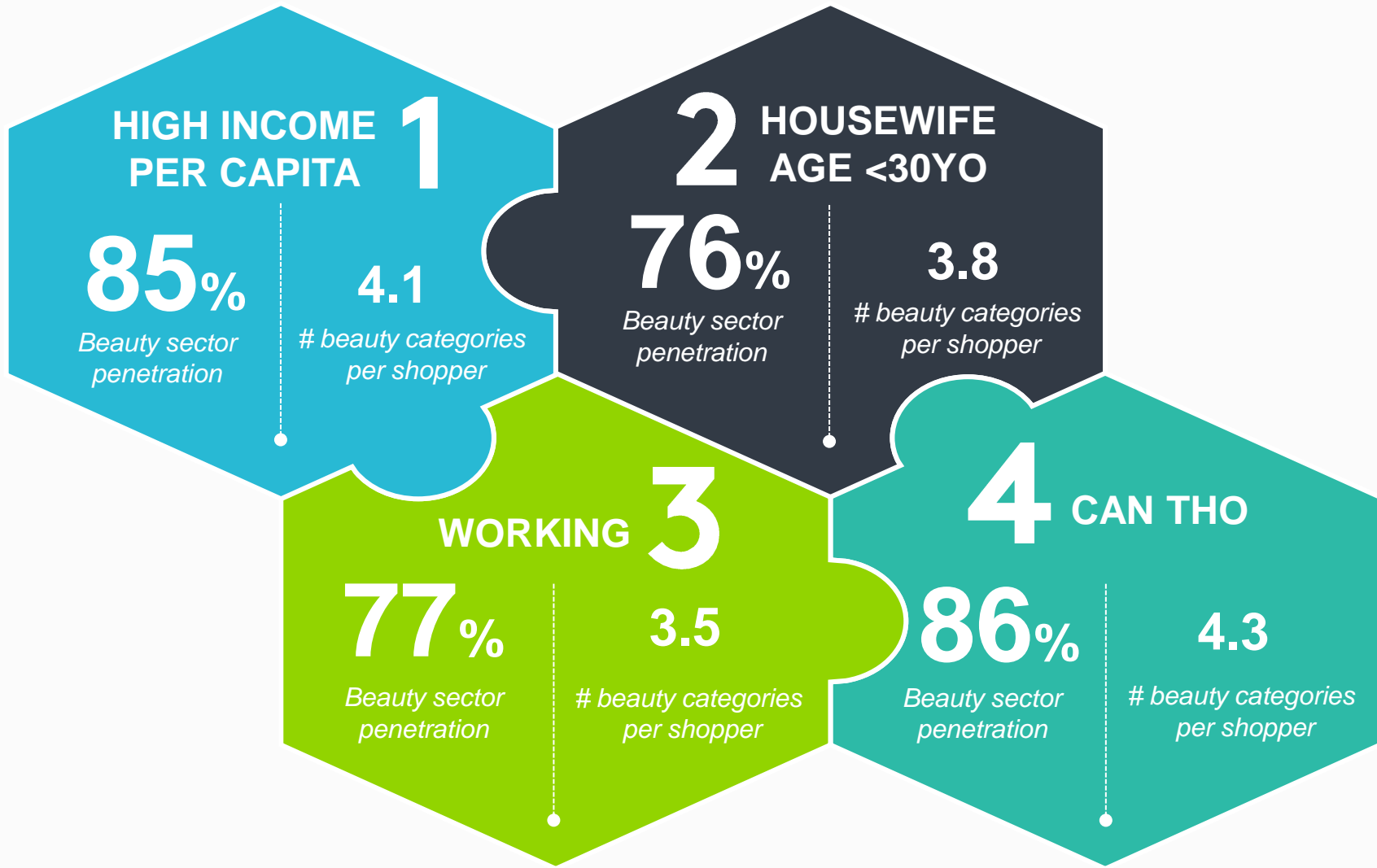
Source: Kantar Worldpanel | Households Panel | Urban Vietnam 4 key cities | FMCG & Beauty Categories excluding gift | One year ending June 2016

TOP TRENDS OF BEAUTY INDUSTRY



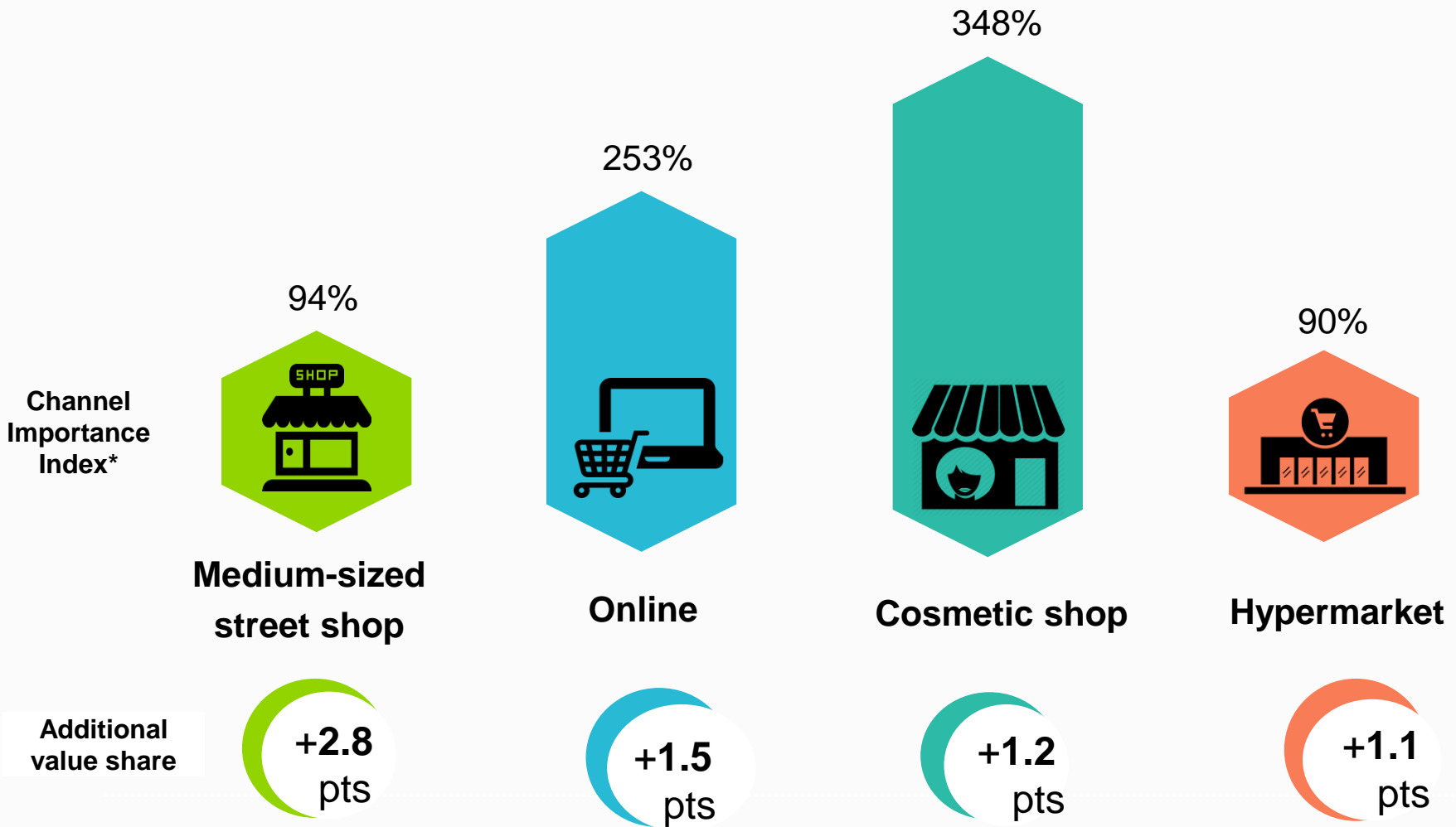
Source: Kantar Worldpanel | Households Panel | Urban Vietnam 4 key cities

MORE ADOPTION OF BEAUTY PRODUCTS AMONG THE SOUTHERN, RICHER, YOUNGER AND WORKING SHOPPERS



Source: Kantar Worldpanel | Households Panel | Urban Vietnam 4 key cities | Beauty Categories excluding gift | One year ending June 2016

TOP GAINING CHANNELS SKEW TO MEDIUM-SIZED STREET SHOPS, ONLINE, COSMETIC SHOPS AND HYPERMARKET



*Channel Importance Index: Channel Contribution to Beauty Categories versus Total Personal Care

Source: Kantar Worldpanel | Households Panel | Urban Vietnam 4 key cities | FMCG excluding gift | One year ending June 2016

KANTAR WORLD PANEL Inspiring successful decisions

About Kantar Worldpanel

Kantar Worldpanel is the global expert in shoppers' behaviour.

Through continuous monitoring, advanced analytics and tailored solutions, Kantar Worldpanel inspires successful decisions by brand owners, retailers, market analysts and government organisations globally.

With over 60 years' experience, a team of 3,500, and services covering 60 countries directly or through partners, Kantar Worldpanel turns purchase behaviour into competitive advantage in markets as diverse as FMCG, impulse products, fashion, baby, telecommunications and entertainment, among many others.

For further information, please visit us at www.kantarworldpanel.com.vn

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