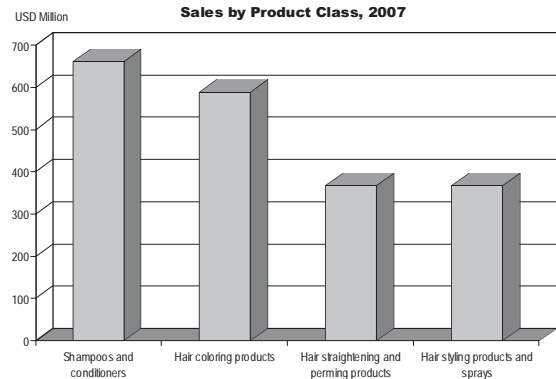


Salon Hair Care 2007: Asia Market Analysis and Opportunities

2007 Fact Sheet

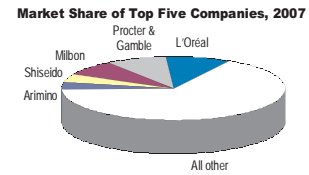
The Market

The market for salon hair care products in Asia totals almost USD 1.9 billion at the manufacturers' level in 2007. Across the three countries analyzed in this report, both Japan and South Korea expect limited growth because the markets are fairly mature. The economic conditions in Japan have been poor, which has resulted in a decline in salon visits by consumers, and the Chinese market has demonstrated healthy growth for the past years, capturing an increased market share, which exerts some positive impacts on the region.



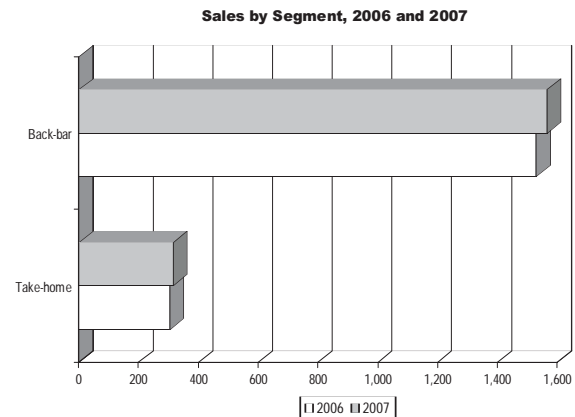
Competitive Landscape

The salon hair care market in Asia is highly fragmented. The top 10 marketers represent 47.6% of the market, and only the top three marketers capture a 5% to 10% share each.



Salon Statistics

Cutting and styling, hair coloring, and perming/straightening are the three major types of salon services in Asia in 2007. Hair cutting and styling represents the largest salon service category in Japan and China, and takes the second position in South Korea. Hair coloring holds the second position in Japan, while straightening and perming ranks second in China and South Korea.



Future Outlook

Salon hair care product sales in Asia are projected to grow at a CAGR of 3.5% to reach USD 2.2 billion in 2012. Some positive factors that will drive growth in the salon industry are that China is projected to show healthy growth in salon hair care industry driven by increasing salon visits and that demographics indicate a growth in the aging of the population, which will lead to a higher usage of salon and hair coloring products.

