

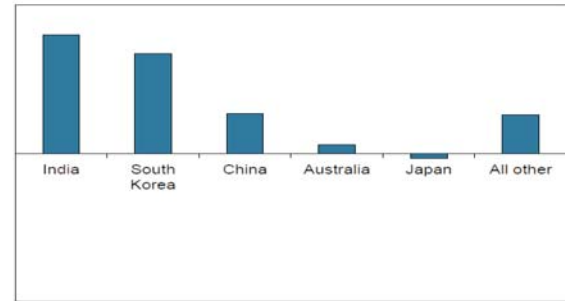
Salon Hair Care 2010: Asia-Pacific Market Analysis and Opportunities

Fact Sheet

The Market

The market for salon hair care products is an estimated \$3.1 billion at the manufacturers' level in 2010. The best performing markets in the region in 2010 are India—fueled by a favorable economic situation and lack of saturation—and South Korea where consumers' response to fashion trends revive the market. Mature markets, such as Japan and Australia, display the poorest performance, with Japan continuing to decrease slightly and Australia increasing only marginally.

Growth of Salon Hair Care Products in Asia-Pacific by Country, 2010

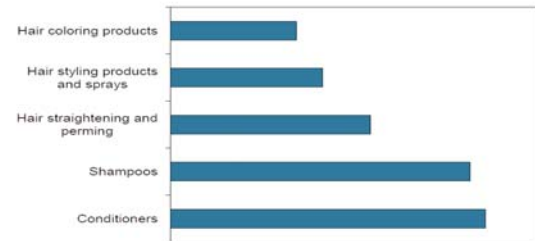


Change, %, 2009-2010

Category Performance

Product innovation makes conditioners, shampoos, and straightening and perming the fastest growing categories. Consumers opt for odorless, more natural products in the hair coloring and straightening categories. Argan oil-based products are very popular. In Asian markets, in general, gray covering is the most common, with the exception of Australia where blonds and reds are popular.

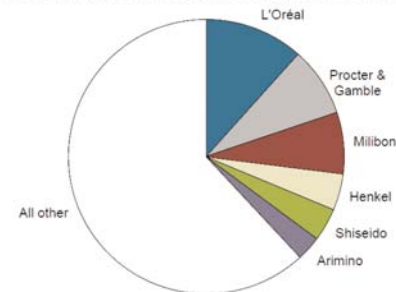
Growth of Salon Hair Care Products in Asia-Pacific by Category, 2010



Competitive Landscape

L'Oréal remains the leading company, commanding an 11.6% share of the market and holding the number one rank in every professional hair care category, followed by Procter & Gamble with an 8.2% market share.

Share of Salon Hair Care Products in Asia-Pacific by Company, 2010



Future Outlook

Salon hair care products are projected to grow at a 4.1% CAGR to 2015. The strongest growth will come from conditioners and shampoos, sales of which are expected to increase at 4.9% annually. Growth will be driven by increasing consumer purchasing power, which will stimulate an increase in salon visits. Growth will be strongest in China and India, although local brands in those markets will lose ground to more experienced and sophisticated multinational brands.

Growth of Salon Hair Care Products in Asia-Pacific by Category, 2010 to 2015

