

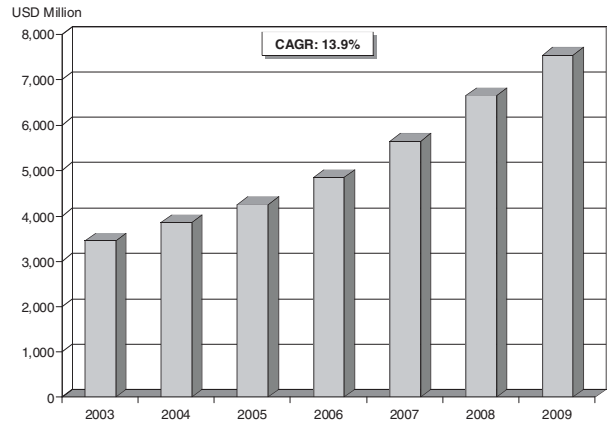
Natural Personal Care 2009:

Global Market Analysis and Competitive Brand Assessment

Asia Fact Sheet

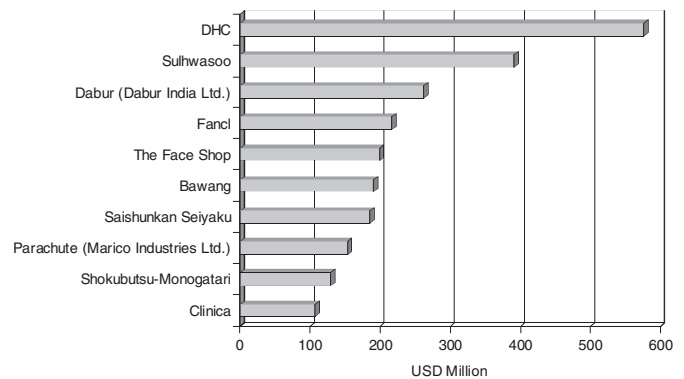
The Market

The natural personal care segment in Asia continues to enjoy double-digit growth of 13.9% CAGR since 2003. However, the global economic slowdown and prolonged recession has brought down the annual growth levels down from about 18% in 2008 to about 13% in 2009. China is the biggest market in the natural beauty segment with close to a one-quarter share of the global market in 2009.



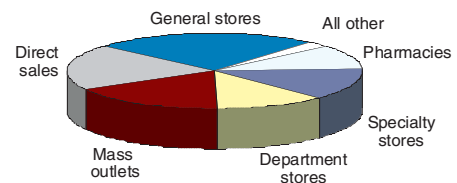
Competitive Landscape

DHC is the largest natural brand in Asia, followed by Sulhwasoo. The Indian brand, Forest Essentials, and three foreign brands, Burt's Bees, Dr. Hauschka, and Weleda, are rated the highest in terms of containing natural ingredients in Asia.



Channels of Distribution

General stores is the largest retail channel in Asia, and direct sales is in second place. Mass merchandisers and pharmacies represent the fastest growing retail channels in Asia in 2009.



Future Outlook

The natural personal care market will continue to enjoy double-digit growth to reach about USD 14.8 billion in 2014. The global economic slowdown has hit the Japanese market badly, but markets in other important Asian markets including China and India seem almost recession-proof. These markets will continue to perform well during the forecast period.

