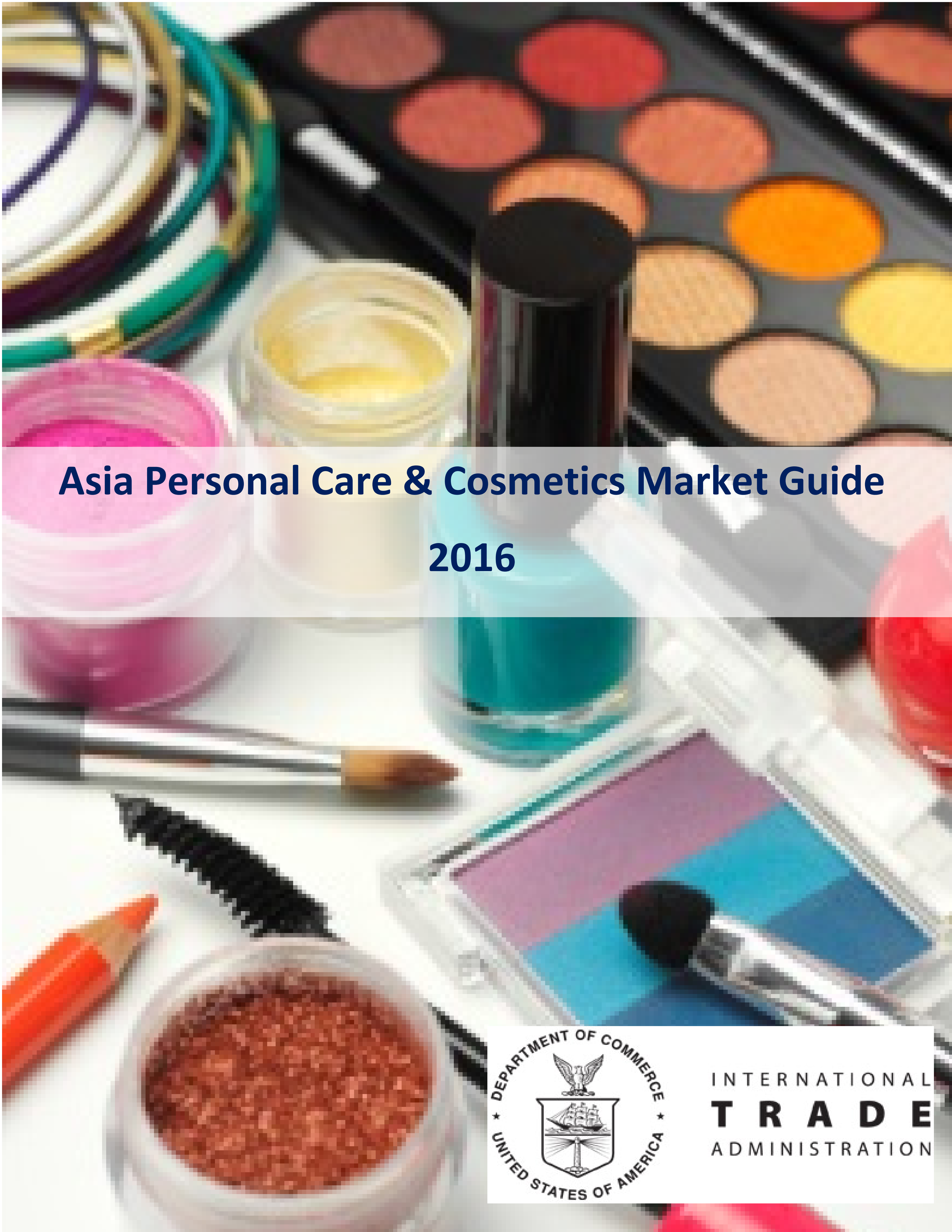

Asia Personal Care & Cosmetics Market Guide

2016

DEPARTMENT OF COMMERCE
UNITED STATES OF AMERICA

INTERNATIONAL
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ADMINISTRATION

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Executive Summary

There Has Never Been a Better Time to Enter Asia's Cosmetics Market Place

The countries in the Asia report represent some of the largest and high potential markets for export-led growth for the U.S. Personal Care and Cosmetics industries. Comprising over 20% of U.S. global exports in the sector, the Asia countries offer the industry over 3 billion potential consumers in the fastest growing global markets. This base includes consumers in well-established markets for U.S. products such as Japan, Australia and South Korea, which together accounted for more than $1 billion in U.S. personal care and cosmetics exports in 2015—to China, which at an estimated $500 to $600 million in U.S. exports that same year, is predicted to become the largest global market for cosmetics in the next two to three years.[1]

In addition, the countries included in the Asia Personal Care and Cosmetics Guide provide access to some of the highest potential future markets—including the growing middle class in countries spanning from Indonesia to Vietnam to Malaysia. These consumers aspire to the quality and sophistication for which U.S. products are known. Currently these markets source most of their basic personal care products such as shampoos, soaps and other grooming products from mass market U.S. companies including Procter and Gamble, Johnson and Johnson and Colgate-Palmolive. Increasingly these consumers are moving beyond the basics to premium skin and hair care as well as color cosmetics opening the door to a wide variety of U.S.-based cosmetics exporters.

Table 1 summarizes three years of U.S. exports to these markets, which have grown across the region by an average annual rate of 6% over the last five years, even during the global downturn of 2011-2012. Stunningly, in some countries U.S. exports have grown by as much as 62% over the past three years in high potential markets such as Indonesia, Vietnam and China and this growth is predicted to continue.

Table 1: Summary of US Exports to the Asia Countries ($USD)

	2013	2014	2015	5 Yr CAGR	3 Year Growth
Hong Kong	$528,831,000	$521,959,000	$516,669,000	NA	-2%
Japan	$568,489,269	$519,891,675	$491,176,604	-1%	-14%
South Korea	$424,921,167	$489,771,533	$487,148,249	4%	15%
China	$324,183,216	$336,578,269	$392,606,007	15%	21%
Singapore	$313,969,980	$324,815,120	$340,553,935	6%	8%
Thailand	$75,207,022	$86,657,330	$80,417,978	2%	7%
Malaysia	$63,298,633	$71,122,679	$78,917,998	9%	25%
Philippines	$52,876,097	$60,813,319	$56,935,354	8%	8%
Vietnam	$40,108,841	$52,840,162	$53,481,224	11%	33%

[1] The estimate of U.S. exports to China is based upon exports to the mainland and an estimated 40% of U.S. exports to Hong Kong, given that these products are then re-exported to China via visitors and other channels.

India	$49,084,035	$55,636,277	$53,771,347	0%	10%
Australia	$19,414,099	$29,362,407	$31,398,239	9%	62%
Total	$2,051,018,946	$2,157,192,939	$2,197,349,243	6%	7%

Source: Trade Policy Information System (TPIS)

Across many of these markets, as illustrated in Table 2, per capita levels of cosmetics spend is still very low, when benchmarked against peer countries such as the U.S. or Japan. China for example, only spends $24 per person annual on personal care and cosmetics products, whereas South Korea and Japan spend $171 and $174 annually.[2]

Table 2: Per Capita Cosmetics Spend in TPP Countries 2014

	Per Capita Cosmetics Spend, 2014
China	$24
U.S.	$139
France	$139
South Korea	$171
Japan	$174
Australia	$30.47
Malaysia	$7 (2013)
New Zealand	$84.92
Singapore	$299 / $90
Vietnam	$5.28 (2013)

Source: US Department of Commerce Estimates

K-Beauty Leads in Product Trends, While U.S. Brands Lead in Trust and Quality

Lead by the global K-Beauty craze, these markets also represent some of the most discerning, sophisticated cosmetics consumers. Vis-s-vis their U.S. counterparts, urban women in many of these countries use five or more products daily. In line with regional cultural values, the most popular products are multifunctional skin care products, protecting skin from harsh sun and other environmental conditions, while promoting skin tone that is even and light. As a result, skin care products represent up to 40% of sales in some markets. However, as Korean and Indian TV and pop-stars dominate popular culture, many young and professional women are increasingly experimenting with color cosmetics. This is reflected in U.S. export statistics in which color cosmetics, including lip, eye and nail polish are among some of the fastest growing categories. The region's men are also increasing consumers of both personal care and grooming products. Similar to women, they value even, clear skin tone and are also willing to experiment with cosmetics. Specialty hair care products, including

[2] Singapore's per capita cosmetics spend is not reflective of domestic demand, as 70% of all cosmetics are re-exported. Therefore, actual per capita spend is likely closer to $90 per person, per annum. (2) Data provided for Malaysia and Vietnam is based on 2013 size of the cosmetics market.

styling products, conditioners and colorants are also growing quickly. These products need to help Asia consumers deal with regional conditions, such as the ability for easy washing due to hard water and stylants that can deal with high humidity, while giving body and UV protection to thicker hair.

To be successful in many Asian markets, companies also need to be sensitive to local trends and competition. For example, Indonesia, representing the largest Muslim population in the world, passed a regulation in 2015 that by 2020 all cosmetics products will have to be labeled as Halal. Whereas in China and India, there is a strong interest in local ingredients and herbal traditions and the properties that these essential oils and other products can bring to personal care products and cosmetics. Asian consumers are also somewhat discerning in terms of packaging. K-Beauty has fueled this trend, with its whimsical and innovative packaging including the air cushion, peel off makeup and lip balms in the shapes of flowers or panda bears.

Smart phone penetration and use for e-commerce is also higher in some Asian countries than even in the U.S., with for example the majority of Chinese consumers having purchased products via e- commerce using their smart phones. Asian consumers also rely on e-commerce to access products, not available in their local market—particularly if they live in second or third tier cities rather than their national capitols. E-Commerce as a result, offers a highly viable entry route for U.S. companies seeking to enter Asian markets. However, companies should be aware that Asia's discerning consumers also expect to be engaged via sophisticated digital marketing and social media campaigns.

Direct Selling is still very popular in some markets, such as the Philippines, where Avon is the largest seller of color cosmetics and Singapore, where direct selling is used as an entry strategy. There is also growing interest in accessing products through specialty salons and doctor-led channels. Private-label brands are also increasingly popular, as the region's retail, hospitality chains and other channels seek to brand these products.

While being mindful of the need to not overly characterize trends across these 11 highly differentiated markets, there are a number of trends of note.

Baby and Child Care Products (Top Export Opportunity)

With Asia's rapidly growing population, baby and child specific products are among the fastest growing product category. While this category is still relatively small—often less than 5% of each country's total domestic market—it is expected to continue to grow, given Asian helicopter parents, who pamper and dote on their children. It also is a highly competitive category for imported products, given consumer sensitivities to the safety of these products, given high levels of adulteration of personal care products. There are still relatively few players in this market outside of Johnson and Johnson, offering a significant niche opportunity for U.S. companies new to the market. Moreover, U.S. branded products also benefit from their strong reputation and track record of safety. However, U.S. companies wishing to enter this product category should be aware that in some Asian markets, there are stricter product approval levels and standards required for these products.

Green or Natural Products (Top Export Opportunity)

Given the number of health scares from adulterated and counterfeit mass market products such as faulty face masks and tainted cosmetics, some Asian consumers are wary of mass products sold via local channels. Green or natural cosmetics, products that contain medicinal, natural or nutritional ingredients such as vitamins, aloe and traditional medicines are very popular. Market data on the trends in these types of products is not readily available, but inputs for these types of products such as essential oils, are among the fastest growing categories in many products. Note: U.S. companies seeking to market these types of products will need to review their claims, labeling and marketing strategies, as in some Asian markets the use of the terms such as natural and organic are banned.

Color Cosmetics (Top Export Opportunity)

Following skin care, color cosmetics are often the second fastest growing product category, for U.S. exports. Asian consumers expect ABCD, multifunction products as well as creative touches such as cooling face gels.[3] They also expect color pallets adapted to local skin tones and fashion trends. Manicures and pedicures are increasingly popular, with an emphasis on bright colors, color-fast gels, and other attributes that make nails stand out, such as textured, decorative coatings and crystals. There is also increasing interest and growing market for permanent make-up.

Other top prospects, include

1. Dry shampoos, leave-in conditioners and styling treatments
2. Facial skin anti-aging creams, whitening lotions, and masks
3. "Dermo-skincare products" for retail distribution
4. Hair coloring products
5. Body treatments, slimming treatments, massage and bath products for use in spas and professional skincare salons
6. Personal care and cosmetic products using organically-grown and naturally-derived ingredients hypo-allergenic, with low concentrations of fragrance and preservatives. The market is still relatively small. In some markets, local distributors sometimes retail them in smaller bottles than non-organic products for the prices to remain competitive.
7. Use-at-home hand held devices for body and facial skin firming and contouring
8. Skincare products for men
9. Nail colors, nail-care products, artificial nails, soft nail gels
10. Color cosmetics, including long-lasting lip stick, cream-based eye shadows and ABC creams
11. Fake eyelashes & semi-permanent eyelash extensions
12. Private labeling and contract manufacturing of skincare and cosmetic products for the leading retail, hospitality and spa/salon chains

Succeeding in Market Authorization

With the introduction of the ASEAN Cosmetics Directive in 2007 and the variety of regulatory requirements across the Asian markets, which span from ingredient requirements to claims and labeling prescribed lists, it is recommended in most of these markets to partner with a local distributor, who can assist with gaining local or regional market authorization for products as well as marketing. Recognizing the challenges for U.S. firms in initially identifying high potential markets, based both on market research and varying compliance

[3] ABCD stands for product attributes, including anti-aging, beauty balm, correct and cover and disguise and diminish, aka Do All

requirements, in this version of the guide we have included a new Market Readiness Checklist. This new tool, enables a comparison of these requirements across countries. Given that market authorization can cost hundreds or even thousands per product SKU in terms of both government and consulting fees, the labeling, ingredient, and registration requirements can play a large role in determining which markets to enter, particularly for those companies that enter a market with at least ten (10) or more SKUs. The new Market Readiness Checklist, assists companies with an initial scan of compliance requirements that would prohibit entry due to cost or inability to meet the requirements. For example in China, the requirement that imported products be animal tested, makes China inaccessible to many companies who will not animal test their products due to branding or the testing costs. We hope that by proving a high level, comparable country-by-country overview of these requirements, the Market Readiness Checklist will significantly assist companies in identifying potential markets, while reducing the time and cost it takes to gather the requirements. Companies will then be better positioned to work with the International Trade Administration in identifying business partners to facilitate the market authorization process, having identified high potential, feasible targets.

How to Use this Guide

This Guide is comprised of two sections.

1. The 11 Country Overviews, which provide an overview of each of the national markets, highlighting three to five years of market research on trends. Each country guide stratifies the local consumer population, discussing demographic and consumer purchasing trends, as well pricing, distribution and market channels. To assist U.S. companies in understanding their relative positioning in the market, the guides include an overview of the top export countries for each market and the types of products that these countries are successfully marketing. There is also an Annex to each country guide that provides all of the supporting data tables, allowing the reader to drill down more on the data as pertains to their specific product of interest and its performance across the top markets for a given country's imports.

2. The second section is the Market Readiness Checklist, which enables companies to review the market authorization requirements, timelines and costs in each market.

Personal Care & Cosmetics Products Country Guide: Australia

Executive Summary

Through 2018 there are good prospects for Australia's personal care and cosmetics markets, with the overall market conservatively estimated to grow by 4% per annum in 2017 and 2018. Growth in Australia's consumption and imports of these products had slowed in 2013 through 2015, due to a decline in commodity prices and a devaluation of the Australian dollar. However Australia's GDP is now projected to grow at 2.5% in 2016 and 3% in 2017, fueling consumer spending. Australia's relatively high level of discretionary spending, reliance on imported personal products—74% of all consumption in 2015—and affinity for U.S. brands makes Australia a promising market for U.S. cosmetics and personal care products.[4]

In 2015, Australia's total personal care and cosmetics market is estimated at US$3.4 billion. Imports satisfy over 70% of the domestic market with the U.S. holding the largest share at 22%. Other key sources of import are China and the EU. Given Australia's relatively small population, of 24 million people, import competition is very high and imports are up four percent, per annum in the past two years.

Approximately 66% of Australia's population is between the ages of 15-64. Australia's ageing population combined with the fact that consumers are staying longer in the workforce has been a major driver in the demand for cosmetics. The market is conservatively estimated to grow by four percent annually in 2017 and 2018.

Australia has the fourth highest business to consumer (B2C) ecommerce sales rates in the Asia Pacific Region behind China, Japan and South Korea. Australia also has the highest internet penetration rate in the region. Australians spent around AU$1.17 billion ($882 million USD) on online cosmetic purchases in 2015. It is estimated that B2C ecommerce will grow by another eight percent in 2017. Social media is a significant driver in the promotion of B2C transactions.

Given fierce competition in Australia's retail sector, margins for mass and masstique products are tighter. With the introduction of Sephora and the high internet penetration among the Australian population, U.S. firms may find greater opportunities in niche and premium products, through cosmetics specialty stores and online.

[4] Australia has the fifth highest average household net disposable income rate in the OECD. International Monetary Fund. Australia Summary. September 9, 2016.

Overview of the Domestic Market

Size and Growth Trends in the Domestic Industry

In 2015, Australia's total personal care and cosmetics market is estimated at US$3.4 billion, with over 70% of all consumption imported. Through 2018 there are good prospects for Australia's personal care and cosmetics markets, with the overall market conservatively estimated to grow by four percent per annum in 2017 and 2018. Growth in Australia's consumption and imports of these products had slowed in 2013 through 2015, due to a decline in commodity prices and a devaluation of the Australian dollar which also provided an opportunity for more Australian firms to enter the market. However Australia's GDP is now projected to grow at 2.5% in 2016 and three percent in 2017, fueling consumer spending of both imported and domestically produced products.

Australia is a very competitive market, with consumers having high expectations for regular introductions of new innovations and products. Per capita, Australians average annual spend on cosmetics is $146, compared to $139 in the U.S. and $223 in Japan. Prominent product categories in Australia, include mass-market brands, prestige brands, private-label products and professional or salon-only brands. Historically, mass-market brands are the top selling brands including Maybelline, Revlon, Avon, L'Oréal, Covergirl, Max Factor OPI.[5] Mass market brands dominate sales, with fierce competition between supermarkets, discount pharmacies and online retailers slowing profit growth in the mass and masstique segments.

A simultaneous trend has been the development of artisanal or bespoke products developed in response to the increasing range of masstige products. The introduction of the specialty chain Sephora into the market in 2014, is further helping to spur the premium market with three stores now established in country. Using imports as a proxy, given the high levels of imports and the consumption of these products, Table I offers a good overview of three-year demand trends across different product categories.

Across all product price segments and sectors there is increasing demand for "natural" products that prominently feature essential oils, organic, and biodynamic ingredients. There are also an increasingly number of Aussie produced products, with over 200 local brands, with established Australian brands include Dr Lewinn's, Jurlique, Aesop, Napeoleon Perdis, Becca and Model Co, with hot new indie brands including Becca and Ella Bache. In export markets, Australia's major markets include New Zealand, Hong Kong, China, U.K. and U.S.

Make up and Skin Care: These products dominate with over 25% of imports, and are used by over 75% of Australian women. The fast growing subsectors are skin care, sunscreen and color cosmetics. In facial skin care products, top selling brands including Nivea, Olay, Neutrogena, Dove, L'Oreal, Avon and Johnson's. Consumers are increasingly expecting multi-benefit products and Australians tend to be

[5] http://www.roymorgan.com/findings/6474-the-cult-of-australian-cosmetics-june-2015-201509250454

brand loyal, purchasing multiple products from the same brand line. Increasingly in color cosmetics, consumers desire anti-aging benefits, seeking products that emphasize, preserve and protect rather than just improving cosmetic appearance, e.g. wrinkle reduction and evening out skin tone.

Trends in social media, including the “selfie trend” and the need to always be camera ready has younger consumers looking for products that offer a flawless look, with contouring, air brushed, and more prominent color combinations in demand.

In the premium market, niche products in terms of new active ingredients and products for sensitive skin are in demand. There are also an increasingly number of Aussie produced products, particularly in this segment with brands leveraging direct sales to drive growth.

Perfumes and Fragrances: Local market research reports that this segment is somewhat static, due to saturated product offerings, particularly for women’s products. Aggressive price-competition continues to characterize fragrances in Australia, with discount pharmacies such as Chemist Warehouse increasing their share in the category. Discount pharmacies have increased their share through the offering of a wide range of heavily discounted fragrances. In addition, the depreciation of the Australian dollar in 2015, encouraged consumers to shop locally, which lead to the decline in exports in the sector that year. Coty Australia leads sales in the category, with its product line including both mass and premium fragrances such as Marc Jacobs and Calvin Klein, as well as celebrity fragrances It is expected that manufacturers may use brand extensions, such as scented hair sprays and other multi-function products to diversify and increase sales.[6]

Hair Care: In the mass segment, similar to other products high levels of competition are driving down value for these products, with L’Oreal the most popular brand. Shampoo sales are somewhat stagnant, with the highest growth in colorants and hair styling products. In the next two years, natural ingredients will drive new product innovations leveraging oils and fruit oils and essences, with consumers also looking for multifunctional benefits. Celebrity endorsements and professional hair products are increasingly penetrating this segment. For example, Kate Middleton’s hair stylist, Richard Ward, launched a 14-piece hair care range, The Chelsea Collection, in 2016, which includes ingredients such as Argan oil and keratin as well as an anti-ageing elixir.[7]

Men’s grooming: Vis-a-vis other Asian markets, there is stagnant demand for men’s grooming products, due to increasing acceptance of facial hair and a stubble look. Specialty products such as beard grooming may offer prospects.

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[6] “Fragrances in Australia.” Euromonitor International. June 2016.
[7] “Hair Care Products in Australia.” Euromonitor International. June 2016.

Table I: Total Imports of Personal Care and Cosmetics to Australia (US$) (Thousands)

HTS Code	Description	2013	2014	2015	3 Year Avg Growth	% Share of 2015 Imports
3301	Essential Oils	$35,538	$39,183	$49,711	40%	2.00%
330290	Fragrances & Substances Used as Inputs	$31,835	$37,418	$31,518	-1%	1.27%
3303	Perfumes And Toilet Waters	$351,877	$310,746	$311,249	-12%	12.54%
3304	Make-Up & Skin-Care Preparations	$590,246	$633,433	$668,731	13%	26.94%
3305	Hair Care Products	$225,536	$225,067	$225,991	0%	9.10%
3306	Oral & Dental Hygiene	$90,519	$96,746	$104,969	16%	4.23%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$134,075	$133,318	$131,390	-2%	5.29%
3401	Soap & Other Products to Wash the Skin	$199,545	$219,176	$224,903	13%	9.06%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$133,196	$145,883	$156,562	18%	6.31%
4818	Personal care wipes, Diapers, Tampons	$189,478	$188,302	$194,085	2%	7.82%
5601	Sanitary Towels and Napkins	$25,929	$27,946	$27,311	5%	1.10%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$137,054	$155,799	$163,409	19%	6.58%

9605	Toilet Sets for Personal Travel	$7,087	$7,509	$7,766	10%	0.31%
9619	Diapers and fem hygiene	$227,665	$226,782	$216,329	-5%	8.71%
	Total US Exports	$2,347,746	$2,409,891	$2,482,404	6%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Consumer Profile

Australia's total population in 2016 was 24 million and grew by 1.4 percent on 2015 figures. Approximately 66% of the population is aged 15-64.

People aged 15-24 make up approximately 10% of retail buyers. While they are highly responsive to social media marketing, they lack financial resources. The main retail buyer groups are people aged 25-34 (22%), 35-44 (25%), 45-54 (20%), 55 and over (23%).

In 2020 Australia's median age will be 38.2 as opposed to 35.4 at the start of the millennium, with more 65 year olds than one year olds. The median age is currently 37 and increased by close to five years over the last two decades. The percentage of the population aged 65 and up has gone from eight percent in the 1970s to 14% now. In the 1980s women made up 35 percent of the workforce. Women now represent 45% and workforce participation rates have increased for both men and women. Australia's ageing population combined with the fact that consumers are staying longer in the workforce has been a major driver in the demand for cosmetics.

Distribution Channels and Marketing

Australia has the fourth highest B2C ecommerce sales rates in the Asia Pacific Region behind China, Japan and Korea. Australia also offers the highest internet penetration rate in the region. Online retailing is valued at AU$18 billion and represents approximately seven percent of total retail spending (AU$260 billion). Australians spent around AU$1.17 billion on online cosmetic purchases last year (6.5 percent of total online retailing sales). It is estimated that B2C ecommerce will grow by another eight percent in 2017. Social media is a big driver in the promotion of B2C transactions. It is also a major driver in traditional retail sales. Facebook, Instagram and Snapchat are among the platforms and apps being used to create brand awareness.

While selling directly to consumers is a strategy that many international brands and overseas sellers are adopting, selling directly to Australian retailers is not common. While an Australian consumer is permitted to source cosmetics from any seller for personal use, importing commercial quantities requires the importer to be registered with the relevant authorities and to ensure that the cosmetics meet chemical import and safety requirements. For this reason, most retailers prefer to work with local Australian suppliers. Entering the market via e-commerce can offer an opportunity to test consumer interest, if the products are directly sent to individual consumers, thereby passing the need for product registration.

There are between 20-25 distributors that sell cosmetics into the mass market. These distributors tend to focus on sundry items but some do represent premium brands. The line between premium and mass market in Australia is somewhat blurred—as mass market products move to masstique and premium markets heretofore not available in discount retail stores.

Retail concentration is high in Australia. The grocery market is dominated by Coles and Woolworths who between them account for 72 percent of grocery sales. Coles (Wesfarmers) and Woolworths also own the three discount department store chains – Kmart, Target and Big W. These five outlets account for a very significant share of personal care product sales.

Premium brands are sold through pharmacy chains and Australia's only two department store chains – Myer and David Jones. By contrast there are about 5,000 pharmacies in Australia, 12 percent of these are independents, and 25 percent are controlled by three discount pharmacy chains. The Chemist Warehouse is the biggest of these chains and, according to a Roy Morgan Research survey conducted in 2014, had six percent share of cosmetic sales. The same survey found that Priceline (a major pharmacy chain exclusively focused on beauty products) had 15 percent, Myer had 15 percent and David Jones had nine percent.

In terms of the professional beauty segment there are about 17,000 hairdressing salons, 3,000 beauty salons, 3,000 nail salons, 1,000 day spas and 120 medi spas nationally. The professional beauty industry is growing by about one percent annually. Franchised systems are gaining some share but most salons are small owner-operated business. There are between 80-100 distributors/wholesalers that cater for this segment. There are only about 10 distributors with the capability to promote cosmeceuticals via doctor directed channels.

Product Trends

Australia is not generally known for setting trends but consumers are considered early adopters of international trends. This in part is due to the fact that Australia has the highest internet penetration rate in the Asia Pacific Region. By way of example Australia has 31 million active mobile phone subscriptions serving a population of 23 million. 85 percent of those are smart phones.

Australia is also very culturally diverse. More than one quarter of the Australian population (28%) was born overseas. Beauty trends from Europe, North America and the Asia Pacific very quickly find their way to Australia.

Representative retail prices for the following products (Australian Dollars)

Products	Mass Market		Premium	
	Low	High	Low	High
Perfume	AU$12	AU$30	AU$35	AU$300
Lipstick	AU$10	AU$20	AU$20	AU$55
Eye Shadow	AU$8	AU$22	AU$16	AU$60
Mascara	AU$5	AU$25	AU$20	AU$90
Sunscreen	AU$10	AU$20	AU$40	AU$150
Bronzer/Blush	AU$8	AU$25	AU$30	AU$80
Skin Cream	AU$8	AU$35	AU$50	AU$300
Shampoo/Conditioner	AU$5	AU$20	AU$30	AU$60
Hair Styling Product	AU$4	AU$15	AU$20	AU$40
Deodorant	AU$3	AU$15	AU$20	AU$50
Nail Polish	AU$5	AU$15	AU$7	AU$50
Shaving Prep	AU$3	AU$10	AU$30	AU$50

Retailers of sundry personal care items will typically require a gross margin of between 45-55%. Importers/distributors will seek a gross margin of 25-35%. For premium items a retailer's gross margin can vary from 60-120% while a distributor's margin can be in the range of 40-80%.

Trends in US Imports and Competing Products

Table 10: Imported Products Share of Australia's Personal Care and Cosmetics Market (Thousands)

Importer	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	$518,901	21%	$519,537	22%	$539,014	22%
France	$142,860	6%	$143,216	6%	$134,279	5%
Japan	$20,775	1%	$23,645	1%	$25,492	1%
South Korea	$44,028	2%	$44,028	2%	$46,219	2%
Thailand	$243,848	10%	$312,785	13%	$214,817	9%
China	$337,329	14%	$390,729	16%	$462,601	19%
United Kingdom	$137,935	6%	$130,350	5%	$116,575	5%
EU28 (excludes France & UK)	$371,354	15%	$388,441	16%	$382,343	15%
Other Imports	$665,374	27%	$457,159	19%	$561,065	23%
Total Imports	$2,482,404	100%	$2,409,891	100%	$2,482,404	100%

Over the past five years, the origin country composition of Australia's imports remained relatively stable, with the US maintaining as the main country exporting to Australia. The EU lost market share declining from 18% of all imports into Australia in 2011 to 15% in 2015. The K-Beauty craze has not yet reached Australia, despite the country's significant Asia population. The most significant gains have been achieved by China, which increased 5% from 13% of the market in 2011 to 19% in 2015.

See the following tables for more information on the U.S. and competing countries exports to Australia:

Table 2: Australia Imports of Personal Care and Cosmetics Products from the U.S.

Table 3: Australia's Imports of Personal Care and Cosmetics Products from China

Table 4: Australia's Imports of Personal Care and Cosmetics Products from Japan

Table 5: Australia's Imports of Personal Care and Cosmetics Products from France

Table 6: Australia's Imports of Personal Care and Cosmetics Products from Thailand

Table 7: Australia's Imports of Personal Care and Cosmetics Products from South Korea

Table 8: Australia's Imports of Personal Care and Cosmetics Products from United Kingdom

Table 9: Australia's Imports of Personal Care and Cosmetics Products from EU 28

Make up and Skin Care, HTS 3304

This is the most significant sector for U.S. exports, representing 44% of all cosmetics and personal care exports that the U.S. exported to Australia in 2015. U.S. products experienced the most significant growth in color cosmetics, particularly eye shadow and other eye products, as well as manicure and pedicure preparations. The growth in nail care products may reflect the growing spa and salon market.

Hair Care Products, HTS 3305

Similar to the larger market, sales of U.S. shampoo are down, with sales of specialty products, including hair spray and other styling, conditioning and colorant products up.

Toilet and Other Bath Preparations, Inc. Men's Grooming, HTS 3307

U.S. performance across all of these categories is strong. As Australian men increase their grooming habits, it offers opportunities for import of specialty products such as shaving creams and beard conditioners. Similarly there is an increase in bathing and deodorants and antiperspirants.

See the following tables for an overview of U.S. exports to Australia in these product categories:

Table 11: HS 34: Make Up Products, US Exports to Australia

Table 12: HS 35: Hair Care Products, US Exports to Australia

Table 13: HS 37: Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants, US Exports to Australia

Most of the data used in this report is sourced from Trade Policy Information Systems (TPIS) and the Global Trade Atlas. Please note that U.S. export data does not necessarily correlate with Australian import data due to slight differences in HTS Code classifications for different products. Eg. For 2015, the U.S. recorded exports to Australia, for HTS Code 3305 (hair preparations), of US$54,279,917, while Australia recorded imports from the U.S. under HTS Code 3305 of US$60,367,742.

Top Domestic Trade Fairs

Hair Expo Australia, June 11-13, 2016, Melbourne, VIC
www.hairexpoaustralia.com
The largest hairdressing event of its kind in the Southern Hemisphere. The show attracts and about 10,000 visitors and 120 exhibitors.

SalonMelbourne, March 2-26, 2017, Melbourne, VIC

www.salonmelbourne.com.au
Aimed at the professional salon market in the state of Victoria. The show attracts over 5,000 visitors and 90 exhibitors.

Beauty Expo Australia, August 26-27, 2017, Sydney, NSW
www.beautyexpoaustralia.com.au
The broadest beauty trade show in Australia aimed at the medi, wellness and spa industry. The show attracts over 6,000 visitors and close to 200 exhibitors.

Regulations, Standards, Customs and Tariffs

As a result of the Free Trade Agreement between the United States and Australia, the general import duty on cosmetics and toiletries decreased on January 1, 2005, from five percent to zero. Further information about duties and customs requirements can be obtained by viewing the Australian Customs Service website: www.customs.gov.au.

Cosmetics and toiletries shipped to Australia are subject to GST (Goods and Services Tax), a broad-based tax of 10 percent. While the responsibility to pay GST to the Australian Taxation Office lies with the producer/supplier, it is the consumer who finally bears the GST cost.

Australia has strict regulatory requirements regarding cosmetic ingredients and labeling. Ingredient safety falls with the National Industrial Chemicals Notification and Assessment Scheme (NICNAS), administered by the Department of Health and Ageing, which require approval for use of a wide range of substances, including ingredients in cosmetics.
http://www.nicnas.gov.au/chemical-information/cosmetics

The above link sets out the steps to ensure compliance with NICNAS. Specific cosmetics (that fall under NICNAS's jurisdiction) do not need to be registered as such. It is the "introducer" or importer of the product that needs to be registered with NICNAS. There are different levels of company registration depending on the volumes being brought in but basically the importer needs to renew their registration annually or for any year they are bringing in the product(s). The importer or introducer has to be an Australian company or a foreign company with a physical presence in Australia.

Cosmetics that make therapeutic claims or include sunscreen protection are regulated by the Therapeutic Goods Administration (TGA). Each product's formulation, claims and manufacturing details must be submitted to the TGA before the product can be supplied in Australia. The products also need to comply with GMP (Good Manufacturing Practice). The TGA will need to work with an Australian sponsor.

For More Information:

Contact:

John Kanawati, Commercial Specialist

U.S. Commercial Specialist Australia

Tel: +61-2-9373-9207

Email: john.kanawait@trade.gov

Website: http://export.gov/Australia

Personal Care & Cosmetics Products

Country Guide: China

Executive Summary

China is 10th largest market for U.S. personal care and cosmetics exports, with U.S. products exports totaling $392.6 million in 2015, representing 3% of the total U.S. export market. Within the next decade, China has the potential to become the largest market for U.S. products, with U.S. exports to China growing 64% in the period between 2010 and 2015. While China's rate of economic growth has slowed over the past few years, it has not impacted the growth of U.S. personal care and cosmetics exports. This is likely due to the current low rates of these products consumption in China, which at $24 per person, per annum in 2014, is still far lower than neighboring countries such as South Korea and Japan, which averaged $223 and $174 respectively.

Overview of the Domestic Market

Market Size, Growth Trends and Consumer Profile

With an estimated $50 billion in domestic sales in 2015 and 7% to 10% annual growth predicted in 2016 and beyond, China is projected to become the largest market for personal care and cosmetics products globally in the next five to ten years. Despite its relatively large market size, merely 10% of the population uses cosmetics regularly. Consumption of cosmetics is most prevalent in tier 1 megacities, with increasing penetration in China's inland tier 2 and tier 3 cities, which are also experiencing the fastest increases in China's growing middle class and consumption of consumer products. The majority of consumers of these products are 20 to 30 year olds, although there is a robust level of consumption among 30 to 39 year olds who also consume higher percentages of premium products. While the market is predicted to grow at 10% or greater over the next five years, U.S. companies considering exporting to China should be aware of the high levels of competition and complex product registration requirements required to enter China. Although a slice of Chinese cosmetics and personal care products consumers are willing to pay for branded or premium products, consumers tend to be less brand-loyal and more price sensitive than U.S. or European counterparts. As a result, product demand, even among well established brands, can be volatile from year to year.

Multinational companies continue to dominate the personal care products market in China, with nine of the top ten largest sellers across categories being foreign companies. The three largest sellers in China currently are Procter and Gamble, L'Oreal and Shiseido. This trend is also reflected in domestic production, with over 80% of products produced via foreign-owned or joint ventures.

Distribution Channels

Market channels for personal care and cosmetics products are changing rapidly, reflecting consumer distrust of mass market channels; the upgrading of Chinese consumer preferences; and the growing middle class in Tier 2 and Tier 3 cities.

Sales of these products via grocery stores is down from 81% in 2011 to 70% in 2014—while sales via non-grocery channels, including beauty specialist, department and pharmacy stores is up approximately two percent to 18% of all cosmetics sales in the same time period. Direct selling is up by two percent during this period to 13.5% of all sales. Online retailing is by far the fastest growing channel up from 5.3% in 2011 to 15.5% 2014, with estimates that this channel could grow to 30% or more of total sales in the next five to ten years. The increasingly popularity of online channels reflects both the sparser access to retail stores and diversity of brands in Tier 2 and 3 cities. Consumers who shop via this channel are also unique in that they purchase high levels of premium products.

The rise of online sales was also driven in part by the advantageous terms that cross-border, imported products received vis-a-vis domestically produced products and products imported via traditional channels. These cross-border products were not subject to these same product registration requirements, which in China can cost $1,000 or more per SKU and take up to 8 months to complete registration for nonspecial use cosmetics. As a result, many products not registered for consumption in China, were available via the online channel. Similarly, these products were also subject to fewer taxes. In April 2016, China introduced new e-commerce cross-border regulations requiring registration for cosmetics as well as for a number of other consumer goods sold through this channel—putting these products on a more equal footing with products sold via traditional outlets. It is not yet clear how these policy changes will impact online product sales.

Another important consideration for companies marketing to Chinese consumers is the importance that consumers place upon recommendations from their family and friends for purchasing decisions compared to television, internet and other advertising. A 2015 market research report cited that sixty nine percent of Chinese consumers reported that they purchased products based upon the recommendation of a friend. Additionally, Chinese consumers who are online, on average hold six to eight or more social media accounts and tend to use these channels to research and to inform their cosmetics purchases, with women basing their decisions primarily on information gained via this channel.

Product Trends

U.S. companies new to the Chinese market may find the greatest opportunities in premium or niche products, with demand predicted to grow at a faster rate than the demand for traditional products. Chinese consumers grow increasingly suspect of mass market products. In additional, adults born under the one child policy are more inclined to spend on themselves and luxuries. This group travels more frequently abroad than previous generations. The resulting exposure to foreign brands has instilled a cachet and preference for niche products and foreign origins. Chinese consumers are forecasted to buy 44% of the world's luxury goods by 2020, with the average spend on these items growing 11% year over year per a KPMG consumer survey in 2014. This trend is particularly prevalent in cosmetics. For example, via online channels, Chinese consumers ages 30-39 are purchasing 60% of all online cosmetics sales in China, with an average purchase of $275 and a total annual spend of $644 per annum.

Representative retail prices for the following products (US$)

Products	Mass Market		Premium	
	Low	High	Low	High
Perfume	$10	$28	$43	$100
Lipstick	$11	$19	$40	$99
Eye Shadow	$15	$27	$48	$84
Mascara	$9	$22	$37	$61
Sunscreen	$3	$25	$59	$135
Bronzer/Blush	$12	$27	$57	$107

Skin Cream	$4	$20	$87	$382
Shampoo/Conditioner	$3	$21	$61	$132
Hair Styling Product	$1.5	$5	$19	$51
Deodorant	$3	$5.5	$22	$32
Nail Polish	$2	$9	$16	$28
Shaving Prep	$1.5	$7	$25	$40

Exchange Rate: 1USD=6.68CNY

Source: US Department of Commerce, International Trade Administration Field Research

Trends in US Imports and Competing Products

Table 9: Imported Products Share of China's Personal Care and Cosmetics Market (US$) (Thousands)

Top 7 Importers to China	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	$324,183	8%	$336,578	11%	$392,606	9%
France	$481,913	12%	$557,820	18%	$509,255	12%
Japan	$602,059	15%	$901,830	29%	$1,518,563	36%
South Korea	$356,634	9%	$656,422	21%	$1,260,033	30%
Thailand	$70,835	2%	$61,661	2%	$38,182	1%
Brazil	$30,438	1%	$19,817	1%	$33,720	1%
EU 28 (Excluding France)	$2,138,023	53%	$557,820	18%	$509,255	12%
Total Chinese Imports Reported by Exporters	$4,004,084	100%	$3,091,951	100%	$4,261,616	100%
Total Imports Reported by China (1)	$3,068,131	NA	$3,768,144	NA	$6,117,199	NA

Source: Trade Policy Information System (TPIS), if marked with a *, source is Global Trade Atlas

As illustrated in Table 11, demand trends across countries can be volatile from year to year, given the lack of loyalty among Chinese consumers to specific brands. However, there are some prominent trends. The EU has lost significant market share, with exports to China growing at a much slower pace vis-a-vis Japan, South Korea and the U.S. As a result, while China's imports of products have grown exponentially, the EU market share has shrunk with Japan and South Korea now the largest suppliers of personal care and cosmetics products. South Korea's competitive position with China was also significantly strengthening with the signing of a free trade agreement with China in the summer of 2015, which brings in all Korea products with zero tariffs.

US Imports and Competitors

The following section provides a deeper dive on the sales and demand trends in some of the main product categories, as well as identifying categories that may have the highest potential for U.S. companies new to the Chinese market.

Skin products comprise almost half of the domestic sales at 47%. The next largest category is hair care products at 15%; followed by oral care at 9.4% percent; color cosmetics at 7%; and bath and shower products at 6%.

Table 2 in the Appendix provides an overview of trends in U.S. exports across these and other product categories to China, with the top export market prospects for U.S. firms highlighted in this report.

See Appendix Table 2: China Imports of Personal Care and Cosmetics Products from the U.S.Skin and Sun Care (Sun Care: Top Export Opportunity)

Chinese women, similar to their Asian counterparts, use multiple skin care treatments daily, averaging three products. This focus on skin care is also reflected in U.S. exports, with skin care products comprising 34% of all U.S. exports in the sector. Similar to other Asian countries, there is an emphasis on products that whiten or even skin tone. This consumer preference suggests potential for growing sales of sunscreen products, as well as the inclusion of sunscreens in other products in the future; although currently sunscreens comprise only 1% of domestic sales. Cosmeceuticals, products which combine cosmetic and pharmaceutical features such as acne treatment or anti-aging, are also increasingly popular, growing at an estimated 10% to 20% per annum.

The U.S. is currently the fourth largest exporter of products across this category to China, preceded by the EU, South Korea and Japan.

Baby and Child Care Products (Top Export Opportunity)

Baby and child specific products are the fastest growing product category in China's domestic market with 16.3% growth in2014 according to the Fung Business Center. While this category is still relatively small—at only 4% of the total domestic market—it is expected to continue to grow, given both the increasing interest generally of Chinese parents to pamper their children via child-specific products. It also is a highly competitive category for imported products, given consumer sensitivities to the safety of these products, given high levels of adulteration of personal care products. The baby and child care products category is relatively new in China with few players; therefore offering a significant opportunity for U.S. companies new to the Chinese market. Moreover, U.S. branded products also benefit from their strong reputation and track record of safety. However, U.S. companies wishing to enter this product category should be aware that there are stricter product approval levels and standards required for these products.

Hair Products (Top Export Opportunity)

Niche and premium hair products are the fastest growing segment for U.S. exports to China, up 32.7% over the past three years. Domestically, hair products comprise 15% of the total domestic personal care and cosmetics market, growing at a rate of 3.5% from the prior year. Foreign companies producing locally in China such as Procter and Gamble and L'Oreal dominate the mass market. Imports of U.S. products are growing across all product segments: shampoos, hair preparation and hair spray, with the exception of hair straightening and waving products which are down. Shampoo is the fastest growing segment, followed by other specialty styling products.

Green or Natural Products (Top Export Opportunity)

Given the number of health scares from adulterated and counterfeit mass market products such as faulty face masks and tainted cosmetics, Chinese consumers are increasingly weary of mass products sold via supermarkets and other local channels. Chinese consumers also tend to believe that mass market products, made from synthetic ingredients are less healthy.[8] Green or natural cosmetics, products that contain medicinal, natural or nutritional ingredients such as vitamins, aloe and Chinese traditional medicines are very popular. Market data on the trends in these types of products is not readily available, but inputs for these types of products such as essential oils, grew by an average of 7% over the past three years. Note: U.S. companies seeking to market these types of products in China should seek assistance as to the proper labeling and marketing of these products, as China bans the use of terms such as natural and organic.

Color Cosmetics

Color Cosmetics are the second fastest growing product category, with demand rising over 10% in the past three years.. Hot products continue the focus on evening out skin tone, with color correcting creams and light weight foundations and tinted moisturizers growing in popularity. Color cosmetics comprise approximately 8% of U.S. exports to China in 2015, with lip and eye make-up among the most popular. Manicures and pedicures are increasingly popular especially among Chinese women who prize decorative coatings and artificial nails. There is also increasing interest and growing market for permanent make-up. The U.S. is currently the fourth largest exporter of these products to China, preceded by France, South Korea and Japan.

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[8] Masidlover, Nadya. "L'Oréal Pulls Garnier Brand From China; French Cosmetics Firm's Mass-Market Brand Fails to Gain Traction in Key Emerging Market." Wall Street Journal Online. 08 Jan 2014.

Perfumes, Toilet Waters and Fragrances

Finished perfumes and toilet waters are a less promising product category, comprising only 5.2% of the total domestic market. It is a shrinking market for U.S. exports, growing by 15% in 2015. U.S. exports of fragrances inputs, however, are growing. The U.S. is the third largest exporter of fragrance inputs to China and sales of heavily scented personal care products such as personal toilet (bath washes, deodorants and shampoos) are growing rapidly.

See the following tables for more information on the U.S. and competing countries exports to China:

Table 3: China's Imports of Personal Care and Cosmetics Products from Brazil

Table 4: China's Imports of Personal Care and Cosmetics Products from Japan

Table 5: China's Imports of Personal Care and Cosmetics Products from France

Table 6: China's Imports of Personal Care and Cosmetics Products from Thailand

Table 7: China's Imports of Personal Care and Cosmetics Products from South Korea

Table 8: China's Imports of Personal Care and Cosmetics Products from the EU 28

Table 10: HS 34: Make Up Products, US Exports to China

Table 11: HS 35: Hair Care Products, US Exports to China

Table 12: HS 37: Cosmetic & Toilet Preparations, inc. Shaving, Bath Prep and Deodorants, US Exports to China

Top Domestic Trade Fairs

Cosmoprof Asia
November 16 – 18, 2016
Hong Kong Convention & Exhibition Center
Website: http://www.cosmoprof-asia.com/en-us/

Product Categories: Cosmetics & Toiletries, Natural Health, Beauty Salon, Hair Salon, Nail & Accessories, Pack & OEM

2015 Key Figures:

- 63,241 visits from 119 countries and regions
- 84,000 sqm of exhibition area
- 2,504 exhibitors from 46 Countries and Regions
- 22 country and group pavilions: Australia, Belgium, Brazil, California, Chile, China, France, Germany, Hong Kong, Italy, Japan, Korea, Poland, Spain, Switzerland, UK and USA etc.

Shanghai Beauty Expo
May 23 - 25, 2017

Shanghai New International Expo Center
Website: http://www.chinabeautyexpo.com/

Product Categories: Skin care & Cosmetics, Fragrance, Natural, Household detergent, Franchise & Retail Stores, OEM & Private Label, Beauty Salon, Accessories

2016 Key Figures:

- 387,000 visits from more than 100 countries and regions
- 200,000 sqm of exhibition area
- 2,568 exhibitors from 26 countries and regions
- 15 national and group pavilions: Australia, France, Germany, Hong Kong, Italy, Japan, Poland, Singapore, South Korea, Spain, UK, USA etc.

China International Beauty Expo (Guangzhou) Spring 2017
March 9 – 11, 2017
Guangzhou Import & Export Fair Complex
Website: http://www.chinainternationalbeauty.com/gz/

Product Categories: Beauty, Hair, Spa, Packaging, Professional Salon,

2016 Key Figures:

- 183,700 visits
- 260,000 sqm of exhibition area
- 2,000 exhibitors
- Exhibitors from 22 countries and regions, including U.S., Germany, Thailand, South Korea, Japan, Hong Kong etc.

Regulations, Standards, Customs and Tariffs

The Annex to this report provides a table of the requirements to sell cosmetics in China.

Cosmetics in China are categorized as ordinary and special use cosmetics. Perfume, skin care, shampoo and color cosmetics fall into ordinary products and special use products refer to hair dye, hair perm, hair-growing, sunblock, anti-spot, slimming, breast-beautifying, depilatories and deodorant etc.

According to the CFDA (China Food and Drug Administration), all foreign cosmetic product manufacturers must complete a safety and health quality test, and obtain a hygiene permit before they are allowed to sell in the Chinese market. Application for this pre-market approval process can only be carried out by a Chinese legal entity. Overseas cosmetics manufacturers without legal representation in China are thus required to apply for the permit through agent services. The Manufacture needs to sign a "Letter of Authorization" confirming that it authorizes a Chinese company to be the registration responsible party in mainland China for the products.

Safety and Health Quality Test
This test is performed by designated laboratories appointed by the CFDA and are listed on the CFDA website. All these labs have different testing capabilities designated for testing against specific conditions, such as microbiology, hygienic chemistry, toxicology test (which includes animal testing) or conducting safe-for–human-use trials (for special use cosmetics). The test normally takes 2-3 months for

ordinary cosmetics and 3-8 months for special-use cosmetics, while costs vary from $700 to $6,000 depending on the types and complexity of the products.

Following is the information on some of these testing organizations:

China Center for Diseases Control (China CDC)
Institute for Environmental Health and Related Product Safety
Phone: 86-10/6302-2960; Fax: 86-10/6317-0894
www.chinacdc.net.cn

Shanghai Center for Diseases Control (Shanghai CDC)
Environmental Health Section
Phone: 86-21/6275-8710 x 21; Fax: 86-21/6209-6059
www.scdc.sh.cn

Guangdong Center for Diseases Control (Guangdong CDC)
Public Health Research Institute
Phone: 86-20/8419-7952; Fax: 86-20/8446-9324
www.cdcp.org.cn

Hygiene Permit for Imported Cosmetics

Once testing is completed, the designated laboratory will issue a test report which needs to be submitted together with the other required documents for the application of the Hygiene Permit from CFDA. A committee under CFDA convenes to technical review and evaluate of imported cosmetics. The technical review time will be 3 months generally. If one application has been approved, a certificate will be issued by the CFDA. Companies need to submit the following documents (all translated in Chinese and notarized by a Chinese notarization company):

Application form for the cosmetic product to be imported

- Chinese product name and nomenclature;
- Product formula;
- Product quality and safety control file (The product info such as appearance, flavor, batch no and shelf life is required. Other quality control index like heavy metals and microbiology should be provided as well);
- Original product packaging including labelling information and product information sheet;
- Testing report and relevant data from testing organization certified by CFDA;
- Safety assessment report of cosmetics containing potential risk substances;
- Stamped copies of power of attorney and business license of Chinese responsible agent;
- Statement from manufacturer guaranteeing that materials used meet the requirements of BSE free regions.
- Free Sale Certificate at production country (region) or country (region) of origin
- Brief description and diagram of production process
- Technical requirements for cosmetic products in text
- Other relevant information which can support the application

The applicant will be notified by the CFDA within 5 days confirming whether the application is accepted or not. If the application is not accepted, the CFDA will provide explanation of discrepancies or missing documentation allowing the application to be resubmitted.

The Hygiene Certificate is valid for 4 years, and foreign manufacturers are required to renew it at least 4 months before it is expired.

The information of CFDA is as follows:

China Food and Drug Administration
Address: 26 Xuanwumen Xidajie, Beijing, 100053, P.R. China
Fax: 86-010-68310909
Email: inquires@sda.gov.cn
http://eng.sfda.gov.cn/WS03/CL0755/

Free Sales Certificate (FSC)
US companies exporting cosmetics to China needs to obtain a FSC from the FDA in the US indicating that their products are actually being sold and marketed freely in the US market. US FDA Center for Food Safety and Applied Nutrition (CFSAN) is able to issue the certificate at 10 USD in about 3 – 8 weeks.

Details about the FSC issued by FDA can be found at the following webpage:
http://www.fda.gov/Cosmetics/InternationalActivities/Exporters/ucm129593.htm

In addition to FDA, some US trade associations or State or local health department, e.g. California Department of Health also issue this certificate to US companies. Here is the contact information of two such trade associations:

Personal Care Products Council (PCPC)
1101 17th Street, NW, Suite 300, Washington D.C. 20036-4702
Phone: (202) 331-1770
Fax: (202) 331-1969
http://www.personalcarecouncil.org/

Independent Cosmetic Manufacturers & Distributors (ICMD)
1220 W. Northwest Hwy Palatine, Illinois 60067
Phone: 1-800-334-2623
Fax: 847-991-8161
http://www.icmad.org/membership/certificates.asp

Labeling
Cosmetic products imported into China must be labelled according to the mandatory National Standard GB 5296.3-2008 - Instruction for use of consumer products - general labelling for cosmetics. The manufacturer is required to list the following information, in clear simplified Chinese, on a label:

- Product name;
- Name and address of the manufacturer;
- Net content;
- Product ingredients;
- Shelf life;
- The code of hygiene permit or record-keeping certificate;
- Safety statement and guidance on uses (optional);

- For imported cosmetics, country of origin and the name and address of the distributor in China shall also be given on the label because they will shoulder the legal responsibilities in China as foreign manufacturers.

According to the Administrative Measures on the Regulation on the Cosmetics Advertisement (SAIC 1993), the following are prohibited on the label:

- Exaggerating claims in the name, production method, composition, performance or efficacy of the cosmetics
- Use of the name or image of a consumer or other endorser to prove effectiveness;
- Therapeutic claims and medical terms;
- Comparisons that denigrate similar products;
- Using absolute language;
- Data related to performance, function, sales and other similar features

Customs Clearance

After receiving the hygiene permit, foreign manufacturers are qualified to export their cosmetics to China. When goods arrive at Chinese ports, importers need to apply for an inspection from the local branch of the China Inspection and Quarantine Bureau (CIQ). CIQ's inspection is mandatory for cosmetics imported to China and will do a random sample check and conduct Physio-chemical and microbiological tests. CIQ will also review the Chinese label according to GB 5296.3-2008. If the goods pass CIQ's inspections, CIQ will issue a certificate of inspection which is then used by importers for customs clearance.

The following documents are needed to apply for CIQ inspection:

- A self-declaration letter stating that the imported cosmetic product complies with relevant Chinese laws and the normal use of the product will not cause any harm to human health;
- Product formula;
- Hygiene license or record-keeping certificate;
- Sample labels in Chinese, product labels in the original language and the translated text in Chinese;
- Information on the product name, volume/weight, specifications, country of origin, batch number, expiry date (production date and shelf life), target market, and information about packaging company;
- Other documentation required.

Tax & Tariff rate

HS Code	Description	Tariff	VAT	Consumption Tax
33030000* 33041000* 33042000* 33043000* 33049100*	Perfume Lip make-up Eye make-up Manicure or pedicure Powders	10%	17%	15%
33049900*	Skin care	2%	17%	15%

33051000	Shampoo	6.5%	17%	0%

Source: Customs Import and Export Tariff of the People's Republic of China

* Cosmetic products with sale prices of less than 10 yuan per millimeter or 15 yuan a tablet or sheet (exclusive VAT), consumption tax is 0%.

Animal Testing

Animal testing can be waived for China domestic non special use cosmetics from Jun 2014. But for imported cosmetics, all toxicological tests are still performed in animals to assess the safety of non-special-use and special use cosmetics, which are resulting in substantial numbers of U.S. personal care and cosmetics companies choosing to not export to China. Animal testing for cosmetics is a highly controversial practice and companies which conduct animal tests to meet China's requirements risk high-profile criticism from their clients and activists. For foreign companies claiming their products are cruelty free, there is a possible way for them to place their products in China without animal testing. They can export the bulk to China for filling and packing. Then the products manufactured under this way are regarded as domestic cosmetics. Currently, another way to avoid animal testing is selling cosmetics by cross-border e-commerce.

Intellectual Property Rights

Generally speaking, China's trademark registration is fairly inexpensive and straightforward. To show its commitment to WTO pledges, local judges are encouraged to promote rule of law and act against infringements on behalf of the foreign litigants. But, remember that China's system is 'first to register' rather than 'first to market'. So, if you are seriously looking at this market, registering BEFORE you enter China can save a lot of time, money and frustration should you face infringement at a later stage. The worst case scenario is to have a competitor or other local firms register your brand name in the early stages of your market entry, forcing you to fight an uphill battle for your name. To learn more about protecting your trademark in China, please visit: http://beijing.usembassy-china.org.cn/iprtrade.html

For More Information:

Contact:

Shen Yan, U.S. Commercial Service-Beijing
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Personal Care & Cosmetics Products:

Country Guide: Hong Kong

Executive Summary

Hong Kong is a bifurcated market in that it serves both the local population of 7.2 million, as well as serving as an import hub for China and catering to a large number of tourists and business travelers. In 2014, Hong Kong hosted 60 million tourists, of which an estimated 47 million came from China. As products can be imported duty free from Hong Kong into China, a significant portion of products imported into Hong Kong are repackaged and processed for the Chinese mainland market, with an estimated 55% of Hong Kong's total imports then re-exported to China ($3.65 billion USD in 2015).

With a total national level sales estimated at $2.7 billion in 2015, Hong Kong's personal care and cosmetic products market is dominated by imports, as it has a very small manufacturing sector of its own. China is Hong Kong's largest supplier, followed by France, Japan, South Korea, and the U.S. In 2015, Hong Kong's imports of cosmetics and toiletries increased by 2.4%. Hong Kong's imports of personal care and cosmetics products will likely grow at about 2 to 3% in 2016 and 2017, despite a slower rate of spending on these products from mainland Chinese visitors to Hong Kong. Domestic demand from Hong Kong consumers will also remain strong.

Hong Kong is an important launch pad for marketing cosmetics and skincare products into the mainland Chinese market; it acts as a showcase for the Chinese tourists (45.8 million in 2015) that annually visit Hong Kong, often with shopping for personal, family or even re-sale use as a primary travel objective. There are tremendous opportunities for U.S. suppliers to export to Hong Kong, as local retailers and distributors are eager to increase the variety of products that they can offer to the mainland Chinese tourists, and also eager to cater to the needs of the local population, which is increasingly looking for skincare with the latest anti-aging and skin "whitening" technology.

Hong Kong imported US$517 million worth of personal care and cosmetics products from the U.S. in 2015. In 2015 and 2014, US exports to Hong Kong declined by 1% annually. This decrease is likely due to a variety of factors, including the rising popularity of Korean products, which are increasingly vying for the attention of both premium and mass market consumers, as well as the devaluation of the Japanese Yen and Euro, which made these products more price competitive.

There are no import duties on cosmetics, toiletry and skincare products in Hong Kong and registration is not required for cosmetic products.

Demand within the market is highly concentrated, with the top ten brands accounting for about 70% of the market. Skincare products generate the lion's share of Hong Kong beauty business, followed by make-up and nail products, then perfumes and fragrances. To remain competitive in the local market, it is important to work closely with a Hong Kong distributor to promote the brand, and adapt the products and packaging to suit local tastes. U.S. cosmetic and toiletry products are well received in Hong Kong and enjoy a reputation of high quality, high product safety and hygiene standards, and competitive prices.

Overview of the Domestic Market

Size and Growth Trends in the Domestic Industry

Domestic Production

There are about 70 manufacturers of cosmetics and toiletries in Hong Kong, producing mostly lower-priced to mid-priced products under their own labels for export to China, Macau, the U.S., SE Asia, Japan, the EU, South Korea and Taiwan, as well as OEM /private label production for local skincare salons, spas, dermatologists and medical practitioners.

China and Hong Kong signed the Closer Economic Partnership Agreement (CEPA) on June 29, 2003 allowing several categories of goods, including cosmetics and toiletries, to be imported into China through Hong Kong free of any tariffs (subject to Hong Kong origin requirements.) Under CEPA's rules of origin for cosmetics and toiletries, mixing, blending and heating are processes that must be performed in Hong Kong to qualify as a Hong Kong-origin product. Domestic production of cosmetics, toiletries, and skincare products is expected to increase as more local manufacturers take advantage of CEPA to produce for export to mainland China and for private labels. To qualify for the duty-free access to China, U.S. manufacturers must transfer some blending and mixing processes to Hong Kong.

Table I: Overview of Hong Kong's Cosmetics Trade Flows (thousands)

	2015
Imports	$6,351,929
Local Production Exports	$129,366
Local Consumption	$2,700,000
Exports	$3,522,563
% of Imports Sold in HK	43%
% of Imports Exported	55%

Some leading domestic manufacturers include Voles International Ltd. (brand: O'slee skincare products); Whealthfields Lohmann (Hong Kong)Ltd. (brand: Walch liquid soaps and bath products). Local skincare brands include Seve and JaneClare.

Owing to the high production costs in Hong Kong, many local manufacturers have set up offshore production facilities in China, and in a number of SE Asian countries notably, Thailand, Indonesia, the Philippines, and Malaysia.

Hong Kong's domestic exports of personal care and cosmetic products, 2012-2015 – See Appendix Table 1

Market Size

In 2015, the size of the personal care & cosmetic products imported for direct sale in Hong Kong was estimated at US$2.7 billion. The total value of products imported for direct sale in Hong Kong is project to grow at about 2 to 3 percent in 2016 and 2017. In 2016, it was projected that direct sales in Hong Kong would decline due to 3% fewer tourists from mainland China; however sales to Chinese tourists remained strong throughout the first three quarters of the year, as did local demand and from other international visitors.

Hong Kong's total imports, including re-imports to China, were valued at $6.35 billion in 2015. These sales are expected to remain the same or increase in 2016, based on the latest consumption data from mainland China; however if the slowing of Chinese gross domestic product slows in future years, it is possible these levels as well as overall sales to mainland Chinese tourists visiting Hong Kong could decline.

Imports

Hong Kong's imports of cosmetics and toiletries increased 2.4 % in 2015 comprising skincare products, make-up, manicure and pedicure products, travel sets of personal care products, hair, bath and oral hygiene products, and scent sprays. The five largest suppliers were China, France, Japan, South Korea, and USA. There is little demand for "Chinese" brands; the majority of imports from China were branded products of foreign companies like Procter & Gamble, Wella, L'Oreal, Unilever, Kanebo, Kao, and Colgate-Palmolive that have manufacturing plants in China. Many foreign manufacturers of cosmetic products have established factories in China to avoid the high import tariffs and other restrictions on domestic retailing and wholesaling. Hong Kong's imports is expected to increase 2-3% in 2016 and 2017, with imports from South Korea, Japan, and the U.S. fueling the increase. Growth in imports is also expected to come from sales of smaller and mass market brands, and products for daily use such as shampoos, bath products, oral hygiene products, deodorants, men's grooming, premium baby and child specific products, and hair coloring products.

For Hong Kong's imports of personal care and cosmetic products, 2012-2015 – See Appendix Table 2

Consumer Profile

Hong Kong's per capita GDP was around US$42,291 in 2015. Hong Kong consumers between 30-49, comprising Hong Kong's largest age group (31.3% or 2.3 million) and having the highest disposable income, are the biggest buyers of imported cosmetics and toiletries. It is not possible to estimate the average cosmetics spend per domestic consumer, given the high number of international visitors to Hong Kong, who purchase these products.
Estimates by Euromonitor show that men's grooming current value sales increased 3% in 2015 to reach US$98 million, which indicates a growing market for men's skin care. The increasing number of men in Hong Kong using cosmetics and skincare products prompted Shiseido Hong Kong to start a Shiseido Men's Club in 2005 and Shiseido has since then been conducting grooming seminars for men. President and Managing Director of L'Oreal Hong Kong said, "we see emerging segments that probably didn't exist a few years ago," citing men's and sun care markets, , among trends that will drive the market in the next few years.

Another large group of prospective buyers is Hong Kong's 45.8 million visitors from China. A Nielsen survey on mainland Chinese tourists' purchases revealed that cosmetic and skincare products were among the top shopping purchases, followed by electronics/photographic products, clothing, and jewelry/watches. The owner of an international Italian fashion and cosmetics brand commented at their Hong Kong flagship store opening, its first in Asia, that Hong Kong " …increasingly represents a launch pad into the Chinese market; it creates the trends and acts as a showcase for this market." While China has reduced import duties on cosmetics and skincare products brought directly into mainland China, thereby reducing the retail price difference between Hong Kong and China, Chinese tourists are still attracted to buying these products in Hong Kong rather than in China. According to industry sources, the perceived authenticity and reliability of the products in Hong Kong stores outweighs the price consideration. Apart from import tariffs that the mainland imposes on cosmetics imported directly into China, there are also VAT and product registration costs which do not exist in Hong Kong. U.S. cosmetic products enjoy an excellent reputation among Chinese consumers. Predictions that 2016 sales to visiting mainland Chinese tourists would drop in 2016 have not manifested as predicted. Sa Sa, a cosmetic specialty retailer in Hong Kong and Asia reported improved sales revenues between April and June 2016 largely due to continued robust spending by the Chinese visitors in their stores

Advertising

Consumers in Hong Kong chose their cosmetics brands from reading ratings of products in fashion magazines, blogs on the internet and other media. If there are no advertisements for the brand, it will be perceived by the Hong Kong consumer as unknown and therefore not a good product. Advertising on local television, on buses, minibuses, trams or outdoor billboards and in the print media, and the Internet as well as celebrity endorsements are essential to promote a brand.

As Hong Kong is one of the world's largest centers for Chinese language publications, it is essential for the appointed distributor to cultivate good relationships with the local media to ensure regular features on their products. Fashion/beauty/lifestyle magazines such as Marie Claire, Cosmopolitan, Elle, and Bazaar publish their Chinese editions in Hong Kong, some of which are distributed in mainland China, Southeast Asian countries, and in Taiwan. These write-ups are essential in building brand and product awareness in the Chinese-speaking markets of Asia. Editors of these publications expect product samples together with product literature and photographs when requesting publicity through their magazines.

Social media such as internet beauty forums, blogs, Facebook, and Weibo have become the latest platforms for promotions of skincare products and cosmetics as they are one of the major influencers to consumers' purchasing decisions. U.S. brands of cosmetics and skincare products are often discussed in the blogs, featured in the product reviews and some also advertise in these websites. Beauty Exchange, Elle, She Critiques and She are a few of the more popular beauty websites.

Other brand-building and promotional activities include make-up demonstrations by overseas make-up artists, makeovers at cosmetic counters, celebrity endorsements of products and engaging bloggers to attend product launches, and to review products.

Direct sales of cosmetics and skincare to consumers via the Internet are gaining popularity in Hong Kong. Many local consumers not only use the internet for market research on new products, blogging and comparing prices, but also for purchasing products not yet available in Hong Kong and products whose online prices are cheaper than retail prices in Hong Kong. The increasing importance of online shopping is reflected in a Mastercard survey of Hong Kong domestic consumers, which reveals that approximately 84% made at least one online purchase of cosmetics in last three months. Another survey done by Nielsen states that the online purchase intentions of these same consumers—e.g. their use of the Internet to search, select and purchase—cosmetics increased to 23% in 2014 from the prior survey. Popular retail websites for Hong Kong cosmetics consumers include Sephora Hong Kong and StrawberryNet as well as a number of U.S. websites.

In developing a distribution strategy for Hong Kong, U.S. companies may need to consider which products to distribute via online versus in-store channels, as well as their pricing strategy as local distributors working with traditional brick and mortar retail channels may demand exclusive access to products. These distributors are increasing concerned that if products are available via the Internet, it will hurt their sales, particularly if the products are available online at a lower price.

Distribution Channels and Marketing

As a channel for retailing cosmetics, department stores in Hong Kong tend to operate more like landlords than retailers. Most do not purchase their own stock but lease their floor space to local distributors of branded cosmetics to operate as concessionaires. They charge between 25% and 35% of the lessees' sales turnover as rent. Having a facial treatment room behind the concessionaire counter has proven to be effective in marketing products in the competitive environment of department store cosmetic floors.

Apart from the department stores, Watsons and Mannings are the two largest personal care chain stores. Suppliers to these chain stores must provide 3-6 months credit along with listing and promotional fees for introducing new products into their stores. The minimum listing fee is about USD 6,500 per SKU. In addition, Watsons has a global buying team and a regional buying team based in Hong Kong handling purchasing for 17 markets and 10 markets, respectively. A U.S. company may be contracted to supply more than one market from the headquarters in Hong Kong.

Other retail outlets for cosmetics and toiletries are the 1,500+ independent dispensaries, supermarket chain stores (Park 'N Shop, Wellcome, Market Place, and Vanguard) and cosmetics specialty stores (Sa Sa, Bonjour, and Colourmix). Sa Sa and Bonjour may include brand cosmetics from parallel import sources or grey market dealers (imported from unauthorized distributors in a third-country), with the majority from products originating from Japan, Taiwan, Korea, U.S. and the EU. The largest of these outlets is Sa Sa, holding approximately 35% of local market share. It is also the largest cosmetics retail chain in Asia, 280 retail stores in Hong Kong, Macau, Singapore, Malaysia, Taiwan, and China that offer more than 600 brands. This includes a range of 17,000 products made of naturally-derived ingredients. Sa Sa imports about 100 brands directly from overseas manufacturers and the rest are from local distributors and suppliers. Sa Sa and Bonjour are extremely popular with mainland Chinese tourists, who account for more than 40% of their sales.

Joyce Boutiques, a high-end specialty apparel store, also retails about 60 small and niche premium skincare, hair care, body care, and cosmeceutical brands (such as Eve Lom, NV Perricone,) under the Joyce Beauty brand. 60% of Joyce Beauty brands are sold exclusively at their stores. As a sign of the growing potential of the cosmeceutical market, Harvey Nichols, which opened in September 2005, devoted part of its department store space to a well-being section called "Beyond Beauty" featuring "the best edited selection of beauty brands – global and niche, cult and everyday products," along with treatment rooms. Beyond Beauty offers skincare, hair care, spa products, fragrances and products for men, with brands such as Ultraceuticals (Australia,) Dr. Brandt (US,) June Jacobs Spa (US,) Intelligent Nutrients (US,) The Organic Pharmacy (UK,) Noesa (Germany,) Strivectin-SD (US,) DDF, Jeneuve (Switzerland,) Cowshed, Zirh, and Maxwell's Apothecary (for men).

The best way to enter a market is through appointing a local agent or distributor. Many Hong Kong distributors have agreements with their overseas principals to include Macau and mainland China. The U.S. manufacturer must, however, provide launch support to the appointed agent or distributor in the form of product samples and sachets for distribution to consumers, salons, doctors, etc.

In private distributor market for skincare products, there are about 100 dermatologists, 50 plastic surgeons, 60 private medical practitioners, and about 70 medi-spas (spas with medical practitioners) that offer aesthetic medical treatments such as chemical peels, botox injections, fillers, IPLs, and other skin laser treatments. These institutions also prescribe and retail skincare products classified in Hong Kong as drugs. According to the Hong Kong Census and Statistics Department, there are 10,170 registered beauty-related establishments employing more than 39,710 practitioners including beauticians, nail artists, make-up artists and beauty products' sales persons in 2015.

Exhibiting at local trade fairs is another important way to enter the market. Exhibitors often locate agents and distributors at trade fairs. Cosmoprof Asia (held annually in Hong Kong in November) is an international trade show featuring cosmetics, toiletries, perfumes, hair products, products for professional salon and spa use, along with raw materials for making and packaging cosmetics and toiletries. It is popular with U.S. manufacturers because buyers from around the world, local importers/distributors and beauty industry professionals visit this fair to find new partners, new products or new companies to represent. U.S. exhibitors have enjoyed tremendous success at this show, locating new customers or finding distributors not only in Asia but also from the rest of the world. The U.S. Department of Commerce has certified the show for the past few years.

The preferred method of quoting for product order enquiries is "CIF landed," and in US Dollars. Local importers pay their overseas suppliers through letters of credit, telegraphic transfers, and bank drafts in the preferred foreign currency of the exporter. Payment by telegraphic transfer is the most popular. The Hong Kong dollar (HK$) is freely convertible and there are no regulations that hamper inward or outward remittance of capital or profits.

Percentage distribution of products by retail/sales channel: See Appendix Table 3

There are no significant shifts in channels of distribution. Department stores and pharmacies are becoming less popular compared with specialty beauty stores. While Internet retailing as a percentage of total sales (0.4% in 2015) is still relatively small, this figure is not reflective of local purchasing habits, as the available sales figure presented in Appendix Table 3, include sales to the large numbers of tourists to Hong Kong.

Product Trends

The most significant shift in product demand is from the higher end French, Japanese, and U.S. brands of skincare and make-up to Korean brands. Facial masks that contain snail cream from Korea are extremely popular in Hong Kong. Ever since snail cream masks become popular in Hong Kong, consumers have changed their facial care regime to include the use of a mask as much as twice a week compared with once a week a few years ago. Korean fashion trends also influence make-up, and hair colors. In mass market products, the Korean influence in increasingly strong, although U.S. and Japanese brands continue to compete well. Similar to trends in the U.S. and Europe, Hong Kong consumers prefer multi-functional products such as moisturisers and foundation that include sunscreen. BB (Beauty Balm) and CC (Correct and Cover) creams are therefore popular.

In premium skincare products, consumers tend to favor cosmetics products that feature dermatological benefits such as those marketed via doctors, medical spas and professional skincare salons. Some retail chains like Watsons and Mannings are increasingly stocking products branded as such, which will increasingly occupy more retail shelf space as demand increases.

Pricing: how local distributors determine prices (e.g. markup, other costs)

An example of a U.S. brand of nail products: If the cost for the distributor is HK$24.50 for a packet of nail products, the local retail chain (Mannings) will ask for a 50% discount. The distributor would sell the nail products to Mannings for HK$12.25. Mannings retails the product for HK$60, a markup of almost 5 times. This is an example of a low profit margin for the Hong Kong distributor. The retail prices in Hong Kong for the U.S. product would generally be 15-30% higher than for the same product in the U.S. In many cases, the local retail price is intentionally set higher than that in the U.S. to project a product of a higher image, imported and made in the U.S. Even the display counters, and overall marketing image is set a few notches higher than its market positioning in the U.S.

In Hong Kong, the importer is often also the wholesaler and the distributor and sometimes even the retailer. The retailers of Sa Sa, Bonjour, Joyce Beauty and Harvey Nichols import products directly from foreign suppliers. The chain stores of Watsons and Mannings, however, prefer to buy from local distributors.

Representative retail prices for the following products (US$)

Products	Mass Market		Premium	
	Low	**High**	**Low**	**High**
Perfume	$11.6	$16.8	$91	$258
Lipstick	$6.4	$12.9	$26	$45
Eye Shadow	$4.5	$11.6	$32.2	$41
Mascara	$12.9	$19.4	$32.2	$41
Sunscreen	$7.7	$11.6	$16.1	$41
Bronzer/Blush	$11.6	$17.4	$32.3	$58
Skin Cream	$2.3	$5.2	$29.7	$374
Shampoo/Conditioner	$9.0	$15.5	$23.2	$32.3
Hair Styling Product	$4.2	$6.9	$23.2	$32.3
Deodorant	$2.2	$3.3	$9.0	$10.3
Nail Polish	$0.64	$6.4	$18.0	$31.0
Shaving Prep	$0.52	$9.0	$12.9	$32.3

Source: US Department of Commerce, International Trade Administration Field Research

Emerging Product Niches and Consumer Groups

Noticeable product niches are those catering to the needs of the aging population such as hair coloring products especially those that contain naturally-derived ingredients, eye brow trimmers that have a light bulb and magnified mirror attached, foot care products and products for very dry feet and hands. Other product niches are those that cater to babies and children with skin allergies, and products for sexual wellness. The latter is popular via both e-commerce and among mainland Chinese visitors.

Use-at-home body firming and skincare products are also becoming popular and they compete with treatments offered by spas and salons.

Other Trends

Owing to the high cost of retail space in Hong Kong, retailers like Watsons and Mannings generally do not stock several sizes of a product. Travel sizes are offered through gifts with purchase or during promotions at Watsons and Mannings. Travel sizes are available instead through retailers like Sa Sa, and Bonjour and some are actually samples but offered for sale to consumers at these stores.

Trends in US Imports and Competing Products

Table II: Imported Products Share of Hong Kong Import Market (Thousands)

Country	2012	% Market Share	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	$486,494	8%	$528,831	9%	$521,959	8%	$516,669	8%
France	$887,722	15%	$882,613	15%	$932,796	15%	$881,708	14%
Japan	$536,284	9%	$545,186	9%	$552,158	9%	$611,463	10%
South Korea	$179,079	3%	$255,577	4%	$342,856	6%	$560,195	9%
China	$2,445,450	41%	$2,363,869	39%	$2,248,827	36%	$2,182,654	34%
Other Countries	$1,428,061	24%	$1,460,357	24%	$1,606,536	26%	$1,599,240	25%
Total Imports	$5,963,090	100%	$6,036,433	100%	$6,205,132	100%	$6,351,929	100%

Source: Hong Kong Trade Development Council

US Imports and Competitors

Over the past four years, the U.S. share of the Hong Kong cosmetics and personal care markets, has stayed relatively stable at 8% with $517 million exported in 2015. The U.S. is Hong Kong's fifth largest supplier following China, France, Japan, and South Korea. In terms of volume the major exports of the U.S. to Hong Kong include make-up/beauty preparations for the skin (US$348 million); perfumes and toilet waters (US$44 million); hair products (US$27 million), safety razor blades (US$25 million); and essential oils, perfume and flavor materials (US$24 million.)

Cosmetics and toiletries imports from the U.S. decreased 1% in 2015. The increasing popularity of lower price skincare and cosmetic products from South Korea than those from the U.S. resulted in consumers switching from American to Korean brands. This is most apparent in color cosmetics, skin care products and fragrances in which prior to 2014, U.S. exports to Hong Kong were growing at over 10% annually. American products also face competition from Japanese products that are more suitable for local consumers. The depreciation of the Japanese yen vis-à-vis the Hong Kong dollar meant that imported Japanese products cost less than a year ago. American brands generally enjoy a reputation for product innovations, and stringent quality control on product safety. Procter & Gamble Hong Kong is the market leader in the cosmetics, toiletries and skincare products sector, recording a market share of 10.3% in 2015. Its skincare brands, SKII and Olay, are advertised widely in the local media and enjoy brisk sales. Both SKII and Olay have a comprehensive range of whitening skincare products, which are popular in Hong Kong. Other leading U.S. skincare brands in Hong Kong are Estée Lauder, Kiehl's, Neutrogena, Clinique, Nu Skin, H2O+, Artistry (Amway's), Usana, Elizabeth Arden, La Mer, and Skinceuticals. In the nail color sector, the U.S. brand OPI dominates in the nail salons. P&G's hair products, and the Gillette brand of razor blades are the market leaders.

Other emerging personal care product markets for U.S. companies, include feminine hygiene products such as sanitary napkins, tampons and cotton wipes, as well as personal deodorants which are growing at 20% to 40% annually.

Local importers frequently cite the need for foreign suppliers to adapt the packaging and size to local tastes. American suppliers should also try to package higher-end potent skincare products in glass jars or bottles to enhance their product image. A local personal care chain store prefers to stock Japanese products on their shelves as they are attractively packaged, especially important given limited shelf space in most Hong Kong stores. This chain store also commented that the Japanese suppliers were willing to adapt packaging to suit the display configurations of their stores.

The strength of U.S. cosmetics and toiletries is in skincare and hair care products for both professional use in spa and hair salons as well as mass-market hair products. Extensive brand-building activities and competitive pricing of U.S. mass-market hair product suppliers like Procter & Gamble, Johnson & Johnson, and Colgate-Palmolive contribute to the success of the U.S. as the market leader in this sector. Manufacturing of these products, however, is mostly in China or other Asian countries. For professional skincare products, Hong Kong consumers prefer U.S. products for their technological advances in product formulations and manufacturing. These made in America products are also perceived as being very safe and many local distributors will advertise that their products are USFDA approved, even though the US FDA does not approve cosmetics products for sale in the U.S.

Currently, the HK$ is pegged at 7.8 to the US$ and has fluctuated little since the inception of the linked rate policy in 1983. Therefore many Hong Kong importers and distributors prefer to buy products from the U.S., as the prices of US products are stable vis-à-vis the Hong Kong dollar, as global fluctuations in the value of the US dollar do not affect the exchange rate.

Competitors

France supplied US$882 million or 14% of Hong Kong's cosmetics and toiletries imports in 2015, including US$665 million of make-up and skincare products and US$196 million of perfumes and toilet waters. Imports of higher-end French brands of make-up and skincare products and perfumes will likely decline as the mainland Chinese tourists, many of whom are bargain hunting,, switch to lower-priced perfumes and Korean brands of skincare products. French perfumes, cosmetics and skincare products will remain popular with Hong Kong consumers, who continue to place a premium on the long traditions of quality among these products. Popular French brands in Hong Kong include L'Occitane, Lancôme, Clarins, Biotherm, Chanel, Lóreal, Christian Dior, Guerlain, Givenchy, Vichy, YSL, Avene, Darphin, Decleor, and Rene Guinot.

Import of cosmetic, personal care and skincare products from South Korea are experiencing double-digit growth for the past few years and in 2015, the increase was 63% resulting in South Korea surpassing US as Hong Kong's fourth largest source of imports. Make-up and skincare products accounted for 8% or US$495 million of the total cosmetics and toiletries imports. The rise in Korean cosmetic product sales can be attributed to the increasing popularity of Korean pop culture among young Hong Kong women, as well as the suitability of these skin care products to the Asian skin type and skin color. Major Korean skincare and cosmetic companies have also invested heavily in soft advertising via sponsorships of local television shows and Korean film and television dramas are also very popular. Many Hong Kong consumers clamor for the brands of skincare products that the Korean film stars use as both male and female stars are all well-groomed" and have "porcelain-like facial skin"

The diversity, innovation and use of natural ingredients in Korean cosmetics also contribute towards the impressive growth in the demand of these products. Popular Korean premium brands in Hong Kong include Sulwhasoo, Whoo, Amore Pacific and Hera, and mid-priced brands including Hanskin, Etude House, Tony Moly, Laneige, Innisfree and Nature Republic. Imports from Korea will continue to grow in the next two to three years as French and Japanese brands lack mass products to compete with the low-priced Korean brands.

Japan was Hong Kong's third largest supplier of imported cosmetics and toiletries in 2015, with US$611 million or 10% of Hong Kong's total imports of cosmetic and toiletries. About 68% or US$417 million of Japan's exports of cosmetic and toiletries to Hong Kong were make-up and skincare products. Local consumers cite suitability of Japanese skincare products and color cosmetics to Asian skin type and skin color as the reason they prefer Japanese products to American and European products. In addition, Hong Kong consumers prefer Japanese packaging and consider Japanese products to be fun, modern and stylish. Local importers commented that Japanese manufacturers were willing to adapt their packaging to local tastes and to the tight space configurations of the local retail chain stores. Hong Kong's imports of Japanese cosmetics and toiletries will continue to remain strong. Popular Japanese brands in Hong Kong include Shiseido, Kose, Fancl, IPSA, Sofina, Kanebo, Menard, and Biore. Consumers who prefer premium skincare products are the main customers of Japanese brands; they trust the quality of the ingredients and the hygiene standards of the Japanese manufacturers.

The top 5 suppliers of Hong Kong's imports are China, France, Japan, South Korea, and the U.S.

Hong Kong's Imports from the U.S. by product, 2012-2015 –See Appendix Table4

Hong Kong's Imports from China by product, 2012-2015 – See Appendix Table 5

Hong Kong's Imports from France by product, 2012-2015 - See Appendix Table 6

Hong Kong's Imports from Japan by product, 2012-2015 – See Appendix Table 7

Hong Kong's Imports from South Korea by product, 2012-2015 – See Appendix Table 8

The top 5 country importers

Procter & Gamble HK Ltd., Estee Lauder HK Ltd., L'Oreal HK Ltd., Amore Pacific HongKong Co. Ltd., and Shiseido Hong Kong Co. Ltd.. are the top five importers in terms of products sold via retail channels in Hong Kong. (Source: Euromonitor International's Beauty and Personal Care In Hong Kong, May 2016)

Top Markets/Opportunities Specific to US Products (Ranked –estimate only)

1. Hair shampoos, conditioners and treatments
2. Facial skin anti-aging creams, whitening lotions, and masks.
3. "Dermo-skincare products" for retail distribution
4. Hair coloring products
5. Body treatments, slimming treatments, massage and bath products for use in spas and professional skincare
salons
6. Personal care and cosmetic products using organically-grown and naturally-derived ingredients hypo-allergenic, with low concentrations of fragrance and preservatives. The market is still relatively small with a customer base of 25,000. To sell these products in Hong Kong, local distributors sometimes retail them in smaller bottles than non-organic products for the prices to remain competitive.
7. Use-at-home hand held devices for body and facial skin firming and contouring.
8. Skincare products for men
9. Nail colors, nail-care products, artificial nails, soft nail gels
10. Color cosmetics, BB and CC creams, & eye liner
11. Fake eyelashes & semi-permanent eyelash extensions

12. Private labeling and contract manufacturing of skincare and cosmetic products for the leading retail chains of Watsons, Mannings, Sa Sa and Bonjour. Watsons has a Health & Beauty Asia division, "private and exclusives brands' team and a "own brand product development" team based in Hong Kong covering several markets including Singapore, Malaysia, Thailand, Indonesia, Philippines, South Korea, Taiwan, China, and Turkey. There is also a division in Hong Kong covering international buying for their stores in Europe. As retail rents in Hong Kong are among the highest in Asia, retailers are very keen to sell private label products that can provide higher margins to cover their rents. Some larger professional skincare salons also source private label products.

Top Domestic Trade Fairs

Cosmoprof Asia; http://www.cosmoprof-asia.com (held annually in November in Hong Kong)

No. of Exhibitors: 2,504 (in 2015)
No of Registrants: 63,241 (of which 40,761 were from outside of Hong Kong)
Product Mix at the trade show: Cosmetics; toiletries; skincare products; perfumes and fragrances; nail products & accessories; hair products, equipment and hair salon furniture; professional beauty salon & spa products & equipment; packaging, raw materials, machinery, private labeling and contract manufacturing services.

Regulations, Standards, Customs and Tariffs

There are no tariffs on imported cosmetics, toiletries and skincare products. Hong Kong accepts U.S. product labeling and there is no local mandatory labeling or registration requirements on cosmetic products. Hong Kong, similar to China, defines cosmetics versus drugs based on the ingredients used and the structure/function claims. If a product does not include any of the ingredients classified for drug use and the claims on its labels, promotional materials or usage instructions are not seen as promoting curative structure/functions then registration as a pharmaceutical is not required. However, it is the obligation of the importer in Hong Kong to have complete knowledge of the ingredients of products. If the composition of the products for sale is found to contain substances that fall within the definition meaning of pharmaceutical product, the importer might commit an offence of the sale of an nregistered pharmaceutical product.

Importers in Hong Kong generally do register those skincare products that contain the ingredient hydroquinone as pharmaceuticals. The registration normally takes nine months to a year to complete. Inquiries on whether a skincare product requires registration should be directed to the Drug Office, Department of Health, Drug Registration and Import/Export Control Division.

The email address for enquiries is pharmgeneral@dh.gov.hk, telephone number: (852) 2319-8458 Fax. Number: (852) 2803-4962.

Information on registration of products is available at https://www.drugoffice.gov.hk/eps/do/en/doc/guidelines_forms/guid.pdf

Owing to the high incidence of Hong Kong Customs and Excise Department seizures of counterfeit cosmetic products, brand owners were urged to register their trade mark and other material brand assets to facilitate enforcement action, even if the product is not sold in a physical place in Hong Kong. This therefore applies to products accessible to users in Hong Kong via the Internet through online sales.

The IP rights owner must also appoint an authorized examiner to assist Customs in differentiating between a counterfeit and genuine products and to give evidence in court. To facilitate the record process especially for overseas brand owners, Customs set up an electronic record co-ordination center in April 2014 to introduce video conferencing and 3D printing technologies. Customs can arrange video conferences with the brand owner's authorized examiner if he/she is not able to travel to Hong Kong. The introduction of 3D printing allows Customs to print 3D samples of the genuine products for verification against the counterfeit product. With the 3D printing technology, Customs can take swift action at local trade fairs where the brand owner suspects that counterfeits of their products are also being showcased in the same trade fair.

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Personal Care & Cosmetics Products

Country Guide: India

Executive Summary

India is one of the fastest growing consumer markets in the world, moving from unorganized informal markets to organized retail in major Indian cities as well as Tier II towns and cities in the country. The cosmetics and personal care industry is one of the fastest growing consumer products sectors in India with a strong potential for U.S. companies. The personal care and cosmetics sector in India has shown continued strong growth, with increasing shelf space in retail stores and boutiques in India, stocking cosmetics from around the world.

Effective April 1, 2013, India introduced a compulsory registration requirement for imported cosmetics products. All cosmetic products imported for sale in India are required to be registered with the Central Drugs Standard Control Organization (CDSCO) which is the Indian licensing authority within the office of the Drug Controller General of India in the Ministry of Health & Family Welfare, Government of India (GOI). This mandatory requirement to register all imported cosmetics represents important costs in terms of time and money and administrative requirements for foreign companies to market their cosmetics products in India.

Growth in organized retail, emergence of a young urban population with increasing disposable income in Indian cities, mounting aspirations, an increase in the number of working women, changing lifestyles, increased affordability of lifestyle-oriented and luxury products, and greater product choice and availability given the growth of the e-commerce market in India are the main drivers of demand for imported cosmetics products.

Key factors to successfully entering the personal care and cosmetics market in India include careful research and analysis of existing sales channels and consumer preferences, which allows U.S. companies to determine the pricing structure, the product mix and brand positioning; identifying the right partner with knowledge of the local market and procedural issues; good planning; maintain consistent follow-up and supply; aggressive due diligence to ensure that partners or distributors are credible and reliable; and perhaps more importantly, patience and commitment to the market. Adaptation and an understanding of Indian skin types and tones is very important, as is a visit to this market to understand local realities.

Developing innovative pricing strategies is also very important for the Indian market. Indian consumers want the best but many are not always willing to pay for it. Understanding the attitudes, preferences and aspirations of the different segments of India's consuming class is crucial to achieving success in the Indian market. For example, given the price-sensitivity of Indian consumers, many cosmetic and toiletries companies launched their products in smaller pack sizes to make them more affordable. Small pack sizes have proved to be very popular in the Indian market as it offers a consumer a lower purchase cost that they can afford and at the same time the opportunity to try new products.

As India is a large country, it may also require multiple marketing and sales efforts. For this purpose, it may be necessary to have more than one distributor or importer covering different regions of the country.

The normal time period has been seen to be around three years for an imported brand to make a market entry and succeed in this market and be considered as a serious player. The initial volumes are likely to be low while the cost of operations is high. During the initial years at least, Indian importers normally look for strong marketing and advertising support from their foreign principals for building the brand in this market.

With the beauty service industry growing rapidly in India, the spa segment in recent years has also been growing, not just only in the number of spas, but also in the diversity of spas and products available.

Overview of the Domestic Market

Growth Trends in the Domestic Industry

The personal care and cosmetics sector in India has had continued strong growth, with increasing shelf space in retail stores and boutiques in India increasingly stocking imported products. Many foreign brands with a strong support structure and an India specific pricing strategy have made a platform for their brands in the Indian market. The total size of the Indian personal care and cosmetics market including services is currently estimated at around $4.5 to 5 billion. The total domestic cosmetics market in India is growing at 15 percent annually, faster than that of the United States and the European markets. Premium global brands are gaining sales as Indian consumers move from functional products to more advanced and specialized cosmetic products.

Main areas of growth include: color cosmetics, fragrances, specialized skin care and hair care products; professional salon items, and make-up cosmetic products.

U.S. products are viewed as high quality but awareness levels are low for smaller U.S. brands. Even with a good growth rate, penetration of imported cosmetic and toiletries is still low in India as compared to other Asian countries. A 15 to 20 percent growth rate in this sector translates into promising potential for U.S. companies. Opportunity areas in this sector include color cosmetics, make-up products, fragrances, specialized skin care and hair care products, professional salon products, nail care products, and spa equipment and products.

India's import of cosmetics and beauty products like lip make-up preparations, eye make-up, manicure/pedicure preparations, perfumes and toilet waters, and other toiletries from the U.S. in 2015 was $54 million. China, France, Germany, U.K. and the United States are long-standing traditional suppliers with imports gradually increasing from Malaysia, Dubai, Thailand, and even Israel in recent years. The strong growth of organized retail in India is also creating a demand for more imported cosmetics products, even in second Tier cities where disposable incomes are larger and the demand is subdued due a lack of choices and options.

Demand in India for premium global brands and specialized products is on the rise as Indian consumers gain exposure to the global media and travel more. The Indian market, which was traditionally a stronghold of a few major domestic players like Lakme, has seen a lot of foreign brands enter the market over the last two decades. The growth rate in the cosmetics market reflects an increasing demand for cosmetics products in India. Premium global brands are gaining sales as Indian consumers move from functional items to more advanced and specialized cosmetic products. Many international brands like Revlon (the first international cosmetics brand to enter India in the mid-nineties), Avon, Burberrys, Calvin Klein, Cartier, Christian Dior, Estee Lauder, Elizabeth Arden, Lancome, Chambor, Coty, L'Oreal, Oriflame, L'Oreal, Yardley, Wella, Schwarzkopf, Escada, Nina Ricci, Rochas, Yves St. Laurent, Tommy

Hilfiger, Max factor, Max Mara, Shiseido, Body Shop, Maybelline New York, MAC, and many more have been present in India for quite some years now.

With more and more international brands entering India in recent years, competition has increased but domestic brands like Lakme from the Hindustan Unilever group continue to do well leading the color cosmetics segment in 2015 with approximately 35 percent market share. Due to its wide brand portfolio, the company has a very strong presence across color cosmetics areas such as eye make-up, facial make-up, lip products and nail products, and also across varied price points. Demand for color cosmetics is expected to remain high in India with sales in this segment alone expected to reach $2 billion by 2020 per industry estimates. Major portion of this growth is expected to result from increasing female employment rates as more women join the workforce, thereby leading to growing aspirations of Indian women and increased image and grooming awareness. Female employment rate in India is currently at around 30 percent.

With the beauty service industry growing rapidly in India, the spa and wellness and body treatment segment in India is also expanding rapidly and attracting increasing attention from international brands. Local brands currently account for approximately 70 percent of the spa market in India and the balance is international spa firms many of whom have partnered with leading hotel brands and other partners. The spa industry in India, though relatively small at around $500 million currently, has grown rapidly over the last few years, not only in the number of spas, but also in the diversity of spas and products available. With the growth of day spas in most major cities in India, spas are increasingly becoming a part of the daily routine of not only affluent sections of society but also the middle class, and no longer considered a luxury reserved just for holidays. The concept of med-spas, though still very much in its infancy, is also increasingly gaining acceptance in major Indian cities. Industry sources expect the spa segment in India to grow at over 60 percent annually over the next decade.

The number of beauty salons in the country is increasing at a rate of over 30 percent annually. A segment of the beauty industry which has become very popular and profitable in recent years is that for bridal makeup. A typical bridal makeup package can cost anywhere upwards of $800 to $8,000.

Pricing is a major barrier for imported cosmetics products in India. High import tariffs at 29%, together with high air freight cost makes the effective landing cost at approximately 2.2 times the ex-factory price to an importer. Multiple taxation including local taxes, high internal shipment cost, trade margins and discounts to salons/spas are other factors that drive the prices higher. Accounting for these factors as well other items such as technical and marketing supports, makes the price to the end consumer very high. Many international brands have had to re-work their pricing strategies and develop special pricing for the Indian market. Developing an innovative pricing structure for India is one of the key success factors for this market.

Consumer Profile

Imported cosmetics have had a major impact on the Indian market. The emergence of a huge middle class, relatively young urban elite population with increasing disposable income, an increase in the number of working women, changing lifestyles, increased affordability of lifestyle-oriented and luxury products, mounting aspirations, penetration of satellite TV, increasing appetite for western goods, and greater product choice and availability given the booming e-commerce market in India are the main drivers of demand for imported cosmetics products in India. Indian consumers tend to look towards international brands as lifestyle enhancement products. Foreign products have enhanced growth of the

Indian market by attracting aspirational consumers. Indians generally perceive foreign brands as being of superior quality.

The strong growth of organized retail and e-commerce in India is also creating a demand for more imported cosmetics products even in second tier cities, where disposable incomes are larger but demand has been subdued due to want of choices and options. In general, the Indian consumer is well aware, well-traveled and more exposed and connected than ever before. Consumer behavior patterns in India are changing as well as Indian consumers have moved from being traditionally savers to spenders. This change seems to have led consumers spending more on themselves and spending more on cosmetics and personal-care products. However, while Indian consumers are willing to experiment and try new stuff, they tend to prefer brands that they know or that have worked well for them earlier. With changing lifestyles, Indian consumers are also found to be investing more in preventive and therapeutics services to look and feel younger.

The number of professional salons is increasing, cosmetic treatments are also growing and the hair and beauty industry is seeing a jump in the per capita annual spend on services at around $200. The spa and body treatment segment is estimated to grow approximately to $750-$800 million over the next five to eight years.

The Indian beauty and cosmetics market is not just the domain of women any longer. Indian men too are increasingly taking to the use of more and more body sprays, perfumes and other cosmetics and toiletries. With rising demand from men, the Indian market is getting enlarged and many players are coming out with cosmetic products, especially hair, and skin care products, for men. The market size of men's personal care segment is estimated to be growing at a 50 percent growth rate, with Gillette having the largest market share. Companies such as L'Oréal have also introduced special men's skin care range for the Indian market.

Distribution Channels and Marketing

In recent years, India has seen tremendous growth of modern organized retail channels like department stores, supermarkets, hypermarkets, specialty store chains, and shopping malls along with direct sales and a highly competitive e-commerce market for cosmetic brands. Large format retailers, department stores and supermarkets are also restructuring to attract more cosmetics brands and allocating more floor space for cosmetic brands. Cosmetics brands also continue to innovate on selling methods. An increasing number of cosmetics companies are dealing with consumers directly through exclusive counters in department stores chains such as *Lifestyle*, and *Shoppers Stop*, and malls featuring their own beauty consultants. Exclusive one-stop shops for only imported cosmetic brands, foreign multi-brand cosmetics stores such as Sephora, and company owned and operated retail outlets such as *Health & Glow* have also come up in major Indian cities. Some Indian and foreign companies have set up exclusive franchised beauty salons across the country to promote their products.

Capitalizing high on the changing global trends and easy online presence, some international brands have also entered Indian market via leading online retail platforms like Flipkart, Amazon India, Snapdeal and others. The E-commerce market current accounts for only 3-4 percent of the total beauty retail market in India. For a new imported brand to get sales through e-commerce is challenging unless the brand has some recognition in India. There is also the general trade channel, comprising of small neighborhood stores, where bulk of the Indian population still shops.

A distributors margin in this market could be anywhere between 8-12%, depending upon the volume or value with value-based products catering to a niche market having higher margins. Local distributors typically mark up 30 percent on the wholesale value to cover for their costs on logistics, manpower, storage and others.

Private label in the India cosmetics market is currently negligible restricted to a few brands, and there is a possible opportunity for private label manufacturers to expand in this market in the future.

Overview of the Domestic Market

US Imports and Competitors

India's import of cosmetics and personal care products and intermediate raw materials such as essential oils is $778 million in 2015. France, Germany, U.K. , China, and the United States have been the traditional suppliers with imports gradually increasing from Japan, Hong Kong, Malaysia, Thailand, and even South Africa, and Israel in recent years. The United States accounts for around 7 percent of India's imports of cosmetics and beauty products at approximately $53 million in 2015.

Some of the major cosmetics items imported by India are fragrances, color cosmetics , long-lasting lipsticks, liquid lip color, eye make-up, specialized skincare products, particularly anti ageing/anti wrinkle, anti blemish and skin whitening (fairness) creams, professional hair-care, hair coloring and styling products, nail colors and nail care products and artificial nails, and preparations for shaving creams and skin care products for men. Sun care products such as sun blocks and sun protection products are also in demand. Body treatments, slimming treatments, massage and bath products for use in spas and professional skincare are also increasing. Imports of organic personal care and cosmetics products is also on the rise, especially in the professional segment.

Table I: India's Imports of Personal Care & Cosmetics (USD$ Thousands) and Market Share

Country	2012	% Market Share	2013	% Market Share	2014	% Market Share	2015	% Market Share
U.S.	$53,334	8	$49,084	7	$55,636	7	$53,771	7
France	$46,387	7	$50,359	7	$54,219	7	$50,661	7
Japan	$46,225	7	$48,919	7	$21,704,688	3	$10,018	1
EU	$185,399	26	$203,067	28	$209,797	26	$206,853	27
China	$149,734	21	$184,007	26	$256,543	32	$232,893	29
Other Countries	$229,274	31	$185,647	25	$193,791	25	$223,233	29
Total Imports	$710,354	100	$721,084	100	$791,691	100	$777,429	100

Source: Trade Policy Information System

See the following tables for more information on the U.S. and competing countries exports to India:

Table 2: India Total Personal Care and Cosmetics Imports

Top Domestic Trade Fairs

There are no large beauty industry trade shows in India yet, but the following are three trade events that are gaining in popularity in the country. There is always a significant presence of Indian buyers and distributors at the Cosmoprof Asia, Bologna; and the Beautyworld show in Dubai.

Professional Beauty, June 26-27, 2017, Pragati Maidan, New Delhi

- Product Mix at the trade show: Professional salon products and services, aesthetic medicine, personal care, aromatherapy and hydrotherapy treatments, feet care, Hair care, grooming services, holistic therapy, skin care and treatments, eye care, perfumes and fragrances, and spa products.

Beauty & Spa Expo, July 3-4, 2017, Pragati Maidan, New Delhi

- No. of Exhibitors: 150-200
- Product Mix at the trade show: beauty salon products; hair salon products; nail products, nail care, nail tools & accessories; spa products; cosmeceuticals; cosmetics & toiletries; salon & spa equipment, furniture, accessories and furnishing; cosmetology & aesthetics machines

Professional Beauty India, September 18-19, 2017 , Mumbai

- No. of Exhibitors: 800
- No of Registrants: 100,000
- Product Mix at the trade show: Professional beauty, wellness, salon, skin care, hair care, spa.

Regulations, Standards, Customs and Tariffs

The Indian licensing authority for mandatory registration of all cosmetics imported in India is the office of the Central Drugs Standard Control Organization (CDSCO) in the office of the Drug Controller General of India (DCGI). The DCGI's office administers the Indian Drugs and Cosmetics Act of 1940, which governs the manufacture, sale, import, export and clinical research of drugs and cosmetics in India. For more information on the DCGI please refer to: http://www.cdsco.nic.in/forms/contentpage1.aspx?lid=1423 . For additional information on key officials, please visit: http://www.cdsco.nic.in/forms/contentpage1.aspx?lid=1441

An application for the issue of a Registration Certificate for cosmetics intended to be imported into India can be made either by: the manufacturer themselves having a registered office in India; or by their authorized agent; or by the manufacturer's subsidiary in India authorized by the manufacturer; or by any other importer. Any other importer refers to any person or business entity intending to import cosmetics other than the manufacturer or its authorized agent or subsidiary.

The fee for registration is U.S. $250 per brand of cosmetics applied for, which may include any number of variants, color, shades or pack sizes. If an importer wants to import more than one brand, a fee of $250 for each brand has to be paid and submit separate application for each.

A brand in this case is defined as the category of cosmetics products as mentioned in the Column 3 of the annexure provided below. It does not mean the trade name of any imported product of the manufacturer or the manufacturer's name itself.

A single application may be made while applying for registration of more than one brand of cosmetics (including its different variants and pack sizes) and manufactured at one or more manufacturing locations by the same manufacturer. A single application in the prescribed form can therefore cover more than one brand and many manufacturing units corresponding to the product brands.

The authorization by a manufacturer to his authorized agent in India has to be documented by a Power of Attorney. The power of attorney shall be executed and authenticated either in India before a magistrate; or in the country of origin of the manufacturer before an equivalent authority or attested by the Indian Embassy in the manufacturer's country; or apostille from Hague convention member countries is also accepted.

In case of any changes in the product specifications, ingredients or variants after being granted the registration, the applicant has to inform about the changes to the registration authority at least 30 days before the imports.

The label of imported cosmetics products has to have the registration certificate number and the name and address of the holder of the registration certificate. In addition, the labels should also have the name and address of the manufacturer, and the name of the country of manufacture. If the product has not been manufactured in a facility owned by the manufacturer, the name and address of the actual manufacturer or the name of the country of manufacture should be mentioned on the label

The time period for issuance of the registration certificate is usually three to six months from the date of submission of the application form and the required documents. The duration of a registration certificate is for a period of three years from the date of its issue unless it is suspended or cancelled sooner for any reason.

Cosmetics products imported into India in bulk for re-packaging and re-processing and 100 percent export to other countries are exempted and will not require registration. The importer will still however need to take necessary permission from the office of the CDSCO and provide a written undertaking that the imported products will not be released for domestic sales in India. The same applies for import of cosmetics for research purposes such as packaging trials, and consumer and other shelf life or transport studies.

Bulk imports of cosmetics into India for re-packaging and sale in the Indian market are not exempted and would need to be registered.

List of required documents for application of the registration certificate include:

- Covering letter by the applicant
- Form 42
- Payment receipt
- Power of Attorney in the name of importer/distributor
- Original or copy of the labels bearing name and address of manufacturer
- Free Sale Certificate/Marketing Authorization letter/Manufacturing license in the country of origin
- Product specification and testing protocol
- List of countries where import permission or registration has been granted
- Pack insert, if any, and
- Soft copies of information about the brands, products and the manufacturer
- Declaration that the products are not animal tested

Particulars of the manufacturer and manufacturing facilities should include name and complete address of the manufacturer and manufacturing facilities along with contact numbers and email addresses; name, address and contact details of the of the applicant; and a brief profile of the manufacturer's business activity in the domestic as well as global market. Particulars of the cosmetics to be registered - brand names of the cosmetics along with their category, variants and pack sizes to be imported for sale in India should also be included.

Registration Procedure

The proposed application process for the issue of a registration certificate for an imported cosmetics brand is as follows:

- An application for registration has to be made in hard copy as well electronically in the prescribed Form 42 along with a cover letter to the office of the CDSCO, Drug Controller General of India in New Delhi along with the prescribed fee of $250 or in equivalent Indian rupees for each brand.

- The cover letter for the application should be on the letterhead of the importer or the authorized agent applying for the registration duly stamped and signed by an authorized person. An authorization by the manufacturer to his Indian agent would need to be duly authenticated either in India before a magistrate or in the country of origin before an equivalent authority.

- The office of the Drug Controller General acknowledges the receipt of the application on a copy of the cover letter with a stamp specifying an acknowledgement number and date of receipt for tracking and future reference.

- The registration fee would need to be paid in designated branches of the Bank of Baroda either in U.S.$ or in equivalent Indian rupees and the original copy of the receipt submitted along with the application for registration. In case of direct payment of fees by a foreign manufacturer in the country of origin, fees can be made through electronic transfer from any bank in the country of origin to the

Bank of Baroda branch in Kasturba Gandhi Marg, New Delhi. Proof of such payment would need to be submitted along with the application for registration.

- Following the application and review by the Drug Controller General's office, a registration certificate valid for three years is issued within six months of the date of application received.

- In case of any importer already holding registration for a finished cosmetic product wanting to import the same product in bulk, the bulk product will be endorsed on the original registration on submission of an application with the relevant documents provided the brand is already registered.

All enquiries on registration of cosmetics should be addressed to:

Drugs Controller Office (Cosmetics Division)
Central Drug Standard Control Organization (CDSCO)
Directorate General of Health Services
Ministry of Health and Family Welfare, Government of India
FDA Bhavan, ITO, Kotla Road
New Delhi – 110 002
Phone: +91-11-2323 6975/65; Fax: 91-11-2323 6973
Email: dci@nic.in
Website: www.cdsco.nic.in ; http://www.cdsco.nic.in/forms/list.aspx?lid=1582&Id=1

Labeling Requirements: Every product imported into India has to be neatly labelled in the outer packaging with the following mandatory details/ labeling declarations: i) name and address of the importer/distributor; ii) generic or common product name of the commodity packed; iii) net quantity in terms of standard unit of weights and measures; iv) Production date: month and year of packing in which the commodity is manufactured or packed; v) Date of import and expiry date; and v) maximum retail sales price (MRP) at which the commodity in packaged form may be sold to the end consumer. The MRP includes all taxes, freight transport charges, commission payable to dealers, and all charges towards advertising, delivery, packing, forwarding and the like. Compliance of the above-stated requirements has to be ensured before the import consignments are cleared by customs in India. If products arrive without being labeled then the consignment is transferred to the bonded warehouse, where it is the responsibility of the importer/distributor to ensure the labelling is done in the customs warehouse else products are not released.

Specifically for cosmetics, a product shall carry on both the inner and outer labels: a) Name of the cosmetic. b) Name of the manufacturer and complete address of the premises of the manufacturer where the cosmetic has been manufactured (Note: If the cosmetic is contained in a very small size container, where the address of the manufacturer cannot be given, the name of manufacturer and his principle place of manufacture along with zip code has to be indicated). c) Names of ingredients in the order of percentage of content.

On the outer label: a) A declaration of the net contents expressed in terms of weight for solids/ semi solids, fluid measure for liquids. (Note: In the case of package of perfume, toilet water or the like, the net content which does not exceed 60 ml or any package of solid or semi solid cosmetic where the net content doesn't exceed 30 gms, the statement of net content need not appear). b) The names of ingredients in the order of percentage of content.

On the inner label: a) Where a hazard exists, adequate directions for safe use, warning, caution or special direction required to be observed by the consumer, statement of the names and quantities of the ingredients that are hazardous or poisonous. b) The names of ingredients in the order of percentage of content.

India allows import of cosmetics into the country only through specified ports of entry, which includes: Chennai, Kolkata, Mumbai, and Cochin sea ports; and Delhi, Mumbai, Chennai, Kolkata, Bengaluru, and Ahmedabad airports. The officer appointed by the Indian government at the port of entry is empowered to take samples for analysis if required. In addition, India has imposed a ban on the animal testing of cosmetics, and the same provisions are also relevant for all cosmetics products imported into India.

Though Indian import tariffs on cosmetics have been significantly reduced over the last several years, total import tariff is still quite high. The total customs duty for cosmetics and beauty products classified under HS Code 3303 to 3307 is currently 29 percent. The components of this total duty includes a basic custom duty of 10 per cent [applied on the cost insurance freight (CIF) value of goods]; an additional duty of customs popularly called countervailing duty or CVD of 12 per cent; and a special CVD of four percent. The special CVD of 4 percent is intended to represent the incidence of sales tax, value added tax and similar levies applicable on domestic goods. The countervailing duty is equivalent to the local excise tax on similar articles manufactured within the country.

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Personal Care & Cosmetics Products Country Guide: Indonesia

Executive Summary

As Southeast Asia's largest economy, with a GDP of US$ 888.5 billion, a population of 250 million and rising incomes, analysts predict that Indonesia will emerge to become one of the top five markets for cosmetics in the next 10 to 15 years.

After sustaining 5% average annual GDP growth over the last decade, growth slowed in 2015, but is projected by the World Bank to reach 5.1% for 2016. President Joko Widodo (known as "Jokowi") took office in October 2014 and has pledged to diversify the economy, and reduce barriers to doing business in Indonesia as a means to increase the country's GDP growth rate to 7% by 2017.

Increases in income levels, due to a higher employment levels and minimum wages and urbanization is supporting a growing middle class, who are increasing their budget for consumer products. Correspondingly, the demand for personal care and cosmetics, and particularly skin, make-up and hair - care products, witnessed rapid and consistent growth of 10-15 percent per annum. In the middle and low-end market segments, domestic manufacturing comprises over 50% of the market and is dominated by international brands including Unilever, L'Oreal and Procter and Gamble. However, as consumers expectations and incomes rise, there is a growing demand for imported niche and premium brands. In 2012, the government reported that imported personal care products and cosmetics lead in product registrations, growing more rapidly than any other imported consumer product.

U.S. branded products are highly regarded in Indonesia for their quality and reputation, and Indonesia's appetite for e-commerce has further facilitated these products entry, particularly in the capital Jakarta and other Tier 2 urban markets, with US imports increasing from 2% to 3% of total imports in 2015. Top prospects for U.S. products include make up, skin and hair care products.

With the world's largest Muslim population, there is increasing interest in Halal products and local brands such as Wardah have been the quickest to leverage this trend. In 2015, Indonesia passed a new Halal regulation that may require all cosmetics as well as a number of other consumer products to be Halal. How Indonesia will define Halal, and if it will allow in products in these segments that are labeled as non-Halal has yet to be determined, but if it follows international norms in other Muslim countries this will require that the products not contain alcohol or ingredients from animals. Indonesia consumers are also following the global trend of increasing preference for "natural" products, with herbal and organic formulations among the fastest growing segments, particularly in premium products.

Overview of the Domestic Market

Size and Growth Trends in the Domestic Industry

Indonesia has approximately 760 manufacturers producing numerous cosmetic products, employing 75,000 people and sustaining an additional 600,000 jobs in related industries nationwide. These producers are mostly cottage industry level producing affordable cosmetics, soaps, lotions and skin care products. In terms of 2015 total domestic sales, Unilever Indonesia, Procter & Gamble Home Products Indonesia and L'Oréal Indonesia represent 50% of product sales.[9] The longstanding presence of these companies is fuelling consumer interest in international beauty and personal care brands, which are perceived as being of higher quality. Many of these companies operate licensed manufacturing facilities in Indonesia including Revlon (produced by PT. Rudy Soetadi & Co. Ltd.), Ponds, Vaseline and Dove (produced by PT. Unilever), and L'Oreal (produced by PT. Yasulor). Among the leading national cosmetic companies are PT. Martina Berto Tbk. (brand: Sari Ayu), PT. Mustika Ratu Tbk., PT. PT. Paragon Technology & Innovation (brand: Wardah Cosmetic), and PT. Ristra Indolab. They produce color make-up, traditional herbal and non-traditional skin care treatments.

According to data from the Ministry of Industry, domestic sales of cosmetics products totaled IDR 11 trillion or US $818 million in 2015. Two of the fastest growing product categories include make-up and skincare, as more and more Indonesian women, generally known to be beauty-conscious and aspirational for flawless, fair complexions, are able to afford these items.

Table 1: Overview of Indonesia's Personal Care and Cosmetics Trade Flows, US$ Millions

	2013	2014	2015
Total Imports	$1,291	$1,196	$1,128
Local Production Exports	NA	NA	NA
Local Consumption	NA	NA	NA
Exports	$1,898	$1,846	$1,126
Imports from U.S.	$19	$29	$31

Sources: Total Imports and U.S. Imports, TPIS; Badan Pusat Statistik (BPS) unofficial export estimate

Consumer Profile

Given its population of over 250 million and rising incomes, analysts predict that Indonesia in the next 10 to 15 years that Indonesia will rise to the top ten markets Asian markets for cosmetics. Of this population, 12-15 percent are estimated to be in the middle-high income range. These are people who can afford to buy imported products. These high-end consumers are concentrated primarily in urban areas. For this group, quality, trends and brand names play an important role in their personal choices.

Distributors notice that products with labels printed "Made in USA" appeal more to consumers. Middle-aged consumers exhibit strong preferences and they tend to become loyal to one brand. Reputation

[9] Euromonitor. Beauty and Personal Care Market Report. Indonesia. 2015.

and name recognition continue to drive their cosmetic purchases. Young consumers are more inclined to shop around, use different products, and select from different brands. High-end consumers are willing to pay a higher price for well-known branded products, which convey higher social status. The middle and lower level income groups are very price conscious and susceptible to economic swings.

Indonesians nowadays are increasingly image and fashion conscious. Daily make-up has become a basic need among working women. While women continue to be the dominant consumers of cosmetic products, sales to the male market segment are steadily increasing. The younger generation has also become regular users of cosmetics and skin care products.

Consumer spending increases during holiday seasons, such as Lebaran or Idul Fitri (Muslim celebration), Chinese New Year and Christmas. Stores take advantage of these times of the year as demand increases during these festive seasons.

Men's cosmetics and personal care are becoming popular and the potential is large. Men's personal grooming products have shown an increase in recent years, a sign that this segment of the Indonesia cosmetics market is growing. Most men's cosmetics are sold in department stores and through multi-level marketing companies.

Business sources predict that the market size and sales for skin care products will continue to increase due to the growing awareness of the value of skin-care treatment for both males and females. An increasing number of men, as well as working women, are more concerned about their skin care, driving the demand for male-oriented products, as well as anti-aging and skin whitening products. The market for both local and imported anti-aging and whitening products still shows growth potential.

Distribution Channels and Marketing

In distribution, consumers' purchasing channels have shifted from traditional trade such as privately run shops to modern trade such as chain stores and other organized retailers. This has led to a fierce rivalry between global and local firms as they compete to maintain sales of standard products and run effective sales promotion.

In Indonesia, personal care and cosmetics are sold through specialty stores, drug stores, department stores, supermarkets, direct marketing (MLM), skin care clinics, and beauty salons. Speciality stores have made their way to Indonesia largest cities, including Crabtree & Evelyn, Kiehl and Sephora. Direct marketing continues to be popular in Indonesia, with their companies positioning as healthy life style brands, offering cosmetics, supplements and other related products, with top brands including Amway, Nu Skin, Tahitian Noni, Sunrider, Forever Living, Herbalife, Jeunesse, and Oriflame.

While mass market personal care brands from global giants such as Unilever and P&G are quite popular and widely available at warungs (traditional mom and pop stores), drugstores, convenience store chains, minimarkets and hypermarkets, a variety of imported masstigue and niche cosmetics brands are gaining a stronger foothold as urban-dwelling, working class women are keen to spend more on premium, up-market products.

According to the Jakarta Post newspaper, Indonesian cosmetic products marketed through social media like Instagram and Facebook, are unsettling established major players like Mustika Ratu and Martina Berto to move out from their comfort zones and stay competitive as new names have begun to disrupt the landscape.

Well established local brands such as Polka, By Lizzie Parra (BLP), or Rollover Reaction have increased their popularity cosmetics enthusiasts through creative campaigns, leveraging social media including Instagram and Facebook. Polka, for instance, relies heavily on the digital world to sell its products. The company believes that online marketing is the best tool to reach what it calls a “borderless market”. Its lip lacquer — a liquid lip color that creates a glossy look — hit the market last year and has sold like hotcakes among teenagers

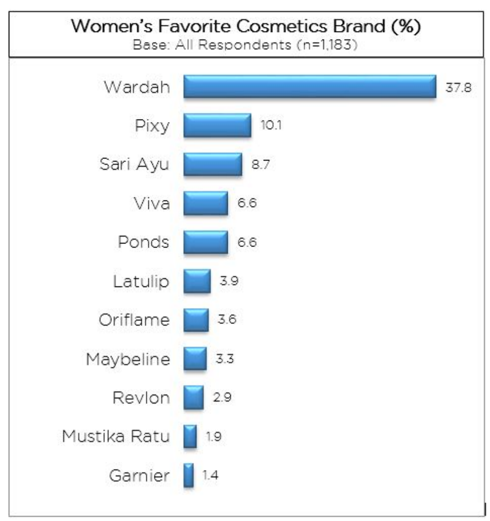
The growth in the e-commerce market in Indonesia will continue its upward trend in the years ahead. Indonesia is one of the biggest online markets worldwide, with 93 million online users, and this number is expected to grow at an average rate of 10% through the end of 2020, to reach over 130 million Internet users.

Product Trends

Indonesian consumers are attracted to branded products. They also tend to be image conscious. Brand loyalty is most likely gained by quality with good packaging, distribution, promotion, and pricing.

The median age in Indonesia is 30.5.[10] Indonesia women tend to follow fashion and cosmetics trends in other Asian countries, particularly Singapore, Hong Kong and increasingly Korea. According to industry sources, products that are popular in Singapore would have good prospects in Indonesia.

In Indonesia, similar to many other Asian countries, skin and hair are the two aesthetic qualities most highly valued. Accordingly, skin and hair care are the two largest categories of product sales, with over 20% of the market. Products which cater to Indonesia’s local climate and cultural traditions, addressing strong sun, high humidity and urban pollution, as well as the requirement of regular face washing ahead of frequent daily prayers fare well. For many consumers products need to have stronger fragrances, higher SPF protection and be waterproof. In skin care, there is demand for products that even skin tone and whitening agents.



Since the cosmetics market in Indonesia is highly competitive, the creation of a strong brand through promotion is recommended for substantial entry into the market. Successful products tend to contain unique formulas or ingredients not available in Indonesia. In addition, a strong marketing campaign and advertising play a major role in

[10] CIA Factbook. Available online at https://www.cia.gov/library/publications/the-world-factbook/.

promoting awareness of products and brands and in expanding market reach. Business sources indicate that cosmetics companies use print media as their primary advertising channels to promote imported cosmetics.
As the largest Muslim population, it is no surprise that halal cosmetics have caught on in Indonesia. While adherence to halal food has been a mainstay for the local Muslim population, adoption of halal cosmetics is a relatively newer phenomenon. For a product to be halal, it should not contain alcohol, should not be tested on animals, and should not contain ingredients from animals. There is also an increasing preference for herbal and organic products, as consumers become more health-conscious and opt for safer, chemical-free treatments.

According to MarkPlus Insight Women Survey 2015 which shows that Wardah – which positions itself as a Muslim-friendly, halal cosmetics brand – was named the most popular cosmetics brand for women. Apart from Wardah, Sari Ayu too is certified halal.

The wide stratification of pricing in Table 2 reflects the differing product requirements and income levels in Indonesia's rural and urban markets.

Table 2: Representative retail prices for the following products (US$)

Products	Mass Market		Premium	
	Low	High	Low	High
Perfume	$3.46	$7.62	$35.31	$134.62
Lipstick	$2.69	$7.54	$10.77	$38.08
Eye Shadow	$2.69	$7.23	$16.54	$57.69
Mascara	$3.46	$6.85	$18.08	$42.31
Sunscreen	$2.69	$14.62	$17.31	$57.69
Bronzer/Blush	$3.46	$11.46	$15.38	$34.62
Skin Cream	$2.69	$21.15	$38.46	$230.77
Shampoo/Conditioner	$2.31	$11.54	$15.38	$26.92
Hair Styling Product	< $3.85	$3.85 - $11.54	$11.54 - $23.08	> $23.08
Deodorant	$1.92	$3.85	$6.08	$25.08
Nail Polish	$2.69	$5.00	$9.62	$23.08
Shaving Prep	$0.00	$6.54	$7.69 - $23.08	> $23.08

Source: US Department of Commerce, International Trade Administration Field Research

Overview of the Domestic Market

Imports

Indonesia imported $1.12 billion of personal care and cosmetic products in 2015, a 13% decrease from 2014. Given that overall domestic cosmetics consumption continued to increase this may be due to increasing national production of both foreign and increasingly popular local brands, including products targeting the halal market.

Table 3: Imported Products Share of Indonesia's Import Market

Importing Countries	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	$19	2%	$29	2%	$31	3%
France	$116	9%	$108	9%	$91	8%
Japan	$69	5%	$55	5%	$60	5%
South Korea	$11	1%	$11	1%	$14	1%
Thailand	$313	24%	$313	26%	$215	19%
China	$179	14%	$183	15%	$171	15%
Other Countries	$583	45%	$496	41%	$546	48%
Total Imports	$1.3	100%	$1.2	100%	$1	100%

Data Source: TPIS

Imports

Among imported products, Thai and Chinese companies have the highest levels of imports and cater primarily to the mass and masstique markets. Chinese products are perceived as affordable, with high quality natural ingredients that are traditional to Asia. There are also a number of illegal imports and counterfeits on the market, coming primarily from China. Thailand was the largest exporter of skin care products and shampoos to Indonesia, accounting for 11% of the total imports in 2015. Imported products, as compared to international brands manufactured in Indonesia, primarily occupy the premium market and with Japanese, European and American products the most popular. International brands found in the market include Guerlain, L'Occitane, La Prairie, ROC, Clarins, L'Oreal, Yves Saint Laurent, Givenchy, Nivea, Oriflame, Seba Med, Shiseido, Kanebo, SK-II, and Kose.

Local cosmetics brands are mostly represented by Mustika Ratu, Martha Tilaar, and Wings. Japanese companies also managed to stay competitive in the Indonesian market, with Kao being one of the top players in the face care and Mandom in make-up and fragrance.

U.S. products accounted for three percent of Indonesia's imported personal care and cosmetic products in 2013, a 1% increase from prior years, even while overall imports declined by 13%. This official number likely understates the percentage of U.S. imports by several percentage points as many U.S. products are shipped through Singapore. U.S. products are also manufactured in other ASEAN countries and exported to Indonesia. At 43%, skin care products represent the largest share of U.S. exports and continue to exhibit high growth, up 23% in the last three years. Hair Care products are the second largest segment at 8% of U.S. exports and 20% growth. There is also growth in color cosmetics, with lip stick especially popular. Consumers' acceptance of U.S. products is fairly high and they are well positioned in the Indonesian market. U.S. products include: Procter & Gamble, Clinique, Obagi, Estee Lauder, MAC, Elizabeth Arden, Revlon, Neutrogena, Cover girl, Olay, H2O, Bath & Body Works, and Victoria's Secret. Some of the products used in beauty parlors are Murad, Sothys, Dr. Cos, ROC, DuraSkin, and Miracle White.

Imports from Southeast Asian neighbors, including Thailand, Vietnam, Malaysia and Singapore are growing in the wake of free trade agreements under the ASEAN Harmonized Cosmetic Regulatory Scheme, which makes imports mutually recognized by national authorities, as long as they are registered in any one of the member states. The importation of personal care and cosmetics into Indonesia still requires approval from BPOM, which can be done by local agents or distributors.

Top Markets/Opportunities Specific to US Products (Ranked – estimate only)

13. Hair shampoos, conditioners and treatments – to maintain healthy hair and prevent hair loss
14. Skin Care: anti-aging creams, whitening lotions, masks, and products that protect, nourish and rejuvenate aging skin
15. Hair coloring products
16. Body treatments, slimming treatments professional skincare salons
17. Skincare products for men
18. Nail colors, nail-care products, artificial nails, soft nail gels
19. Color cosmetics, BB and CC creams, & eye liner

See the following tables for more information on the U.S. and competing countries exports to Indonesia:

Table 4: Indonesia Total Personal Care and Cosmetics Imports
Table 5: Indonesia Imports of Personal Care and Cosmetics Products from the U.S.
Table 6: Indonesia Imports of Personal Care and Cosmetics Products from France
Table 7: Indonesia Imports of Personal Care and Cosmetics Products from the Japan
Table 8: Indonesia Imports of Personal Care and Cosmetics Products from South Korea
Table 9: Indonesia Imports of Personal Care and Cosmetics Products from Thailand
Table 10: Indonesia Imports of Personal Care and Cosmetics Products from China
Table 11: HS 34: Make Up Products, US Exports to Indonesia
Table 12: HS 35: Hair Care Products, US Exports to Indonesia
Table 13: HS 37: Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants, US Exports to Indonesia

Top Domestic Trade Fairs

Cosmobeaute Indonesia, www.cosmobeauteindonesia.com (held annually in October in Jakarta, Indonesia)

No. of Exhibitors: 270 from 17 countries as well as Indonesia (in 2015)
No of Registrants: 11,812 visitors mostly from Indonesia and 22 countries such as Afghanistan, China, Dubai, England, France, Germany, Greece, India, Italy, Japan, Korea, Malaysia, Mexico, Nigeria, Pakistan, Poland, Russia, Singapore, Taiwan, Thailand, Timor Leste and USA.
Product Mix at the trade show: Aesthetic & Wellness Centers, Beauty Schools, Beauty Salons, Department Stores & Supermarkets, Distributors/Wholesalers/Importers, Fitness Club, Hair & Nail Salons, Make-up Studios & Bridal Studios, Perfumery & Cosmetic Shops, Pharmacies & Chain Stores, Slimming Centers, Spa & Aromatherapy.

Regulations, Standards and Customs

There are no restrictions on importing cosmetic products to Indonesia. However, imported cosmetics must be registered at the National Agency of Drug and Food Control (Indonesian acronym BPOM). Registration of imported cosmetics can be done only by local agents or distributors that have authorization from overseas manufacturers. Import duties for cosmetic products are 15 percent. In addition, a value-added tax (VAT) of 10 percent is imposed on all imported cosmetic products. BPOM has taken tough measures on registration of imported cosmetics. The current registration process is slow, with indefinite time for results. This might impact the number of newly imported cosmetic products in the long run, as distributors may focus more on existing products in the Indonesian market.

BPOM regulates and controls the registration, distribution and quality of cosmetics. Imports of cosmetics must comply with Indonesian law. Sales of cosmetics products are regulated through the Directives to Register Cosmetics stated in the "Stipulation on Registration Implementation" and through the Decision of BPOM No. HK 00.05.4.1745, dated May 5, 2003.

Manufacturers or importers must register all cosmetics whether locally produced or imported with BPOM. Likewise, the manufacturer or importer must fulfill the criteria for registered personal care and cosmetic regarding the safety, quality, packaging, and labeling of the products. Labeling must contain honest and complete information that is not misleading and must not contain unwarranted claims. Products should be of good quality, use proper manufacturing methods, and use only safe materials outlined by BPOM.

The Annex to this report provides an overview of the requirements to sell cosmetics in Indonesia, per the requirements of the ASEAN Cosmetics Directive. More on additional national requirements follows:

To register, cosmetic importers must submit an application form to BPOM which includes the following documents:

- **Authorization Letter (LoA)**:
  - Issued by the manufacturer, signed by director with company letter head and stamp of the company, authenticated by Authorized Government Office and respective Indonesia embassy, legalized by public notary, with **'minimum 3 years validation date'.**
- **Certificate of Free Sale (CFS)**:
  - Issued by the authorities or a recognized institution in the country of origin, legalized by the Embassy/Consulate General of the Republic of Indonesia and public notary.
  - If product made in the USA, the CFS should be issued by PCPC (Personal Care Product Council) or ICMAD (Independent Cosmetic Manufactures and Distributors).
  - CFS must list all products that the Indonesian importer intends to register.
- **Good Manufacturing Practice (GMP) Certificate**:
  - A statement by the manufacturer or company that the product was manufactured according ASEAN GMP Guidelines or any ACC approved equivalent GMP Guidelines.
  - Excluding ASEAN countries, GMP must be issued by the authorities or a recognized institution in the country of origin and legalized by the Embassy/Consulate General of the Republic of Indonesia and public notary.
- **Hygiene License:**
  - Certificate must be issued by Food & Drug Administration and legalized by public notary.
- **Qualitative and Quantitative Formula of the Product:**
  - Issued by the manufacturer/principle, signed by Technical Manager with Company Letterhead and Stamp of the Company;
  - List of all ingredients used in the products in qualitative as well as in quantitative with the total percentage of ingredients equaling 100%;

- Name of ingredients should be written in its universal generic name or universal specific name or in International Nomenclature Cosmetic Ingredients (INCI) with the detailed CAS Number;
- Specify the functions of each raw material / ingredient;
- For fragrance ingredient should detail the name, name & address of supplier, have the fragrance code based on International Fragrance Association (IFRA)

On September 20, 2016, BPOM raided six illegal warehouses of counterfeit, fake and unregistered imported and locally produced cosmetics at Asemka Morning Market in West Java. This action came after BPOM conducted tests and found that the cosmetics contained dangerous chemical ingredients. BPOM continues to conduct regular samplings and post-market monitoring on all cosmetics in the market, including high-end and popular cosmetics. The organization has collaborated with customs to prevent illegal and harmful cosmetics from entering the country.

In addition, BPOM has taken tough measures on registration of newly imported personal care and cosmetics. Although the cosmetics law of 2003 is still in effect, registration is now more complicated, requiring additional documents and prolonging the processing time. This registration process frustrates the distributors and may affect new cosmetics imports as distributors concentrate on existing products and withhold new products.

Halal Certification

After six years of debate, the Government of Indonesia enacted the Halal Product Assurance Law No. 33 of 2014 ("Halal Law") on October 17, 2014. According to this law, the government is required to issue the implementing regulations within two years and effectively implement the law within five years after it was enacted. This means that by 2019, halal labeling will be mandatory for all products circulated in Indonesia. Currently, the government is still discussing a Draft Government Regulation on the implementation of this law.

The Halal Law requires mandatory halal certification and labeling for food, beverages, drugs, cosmetics, chemical products, biological products, genetically engineered products, as well as consumer goods that are distributed or traded in Indonesia. The Halal certification is an important provision implemented by the Government of Indonesia to provide convenience, security, safety, as well as certainty for Indonesian customers; and to add more value to goods produced and sold in Indonesia. However, the wide scope and complexity of the Halal Law are of particular concern to various stakeholders, including businesses, sectoral associations and international chambers.

For More Information:

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Personal Care & Cosmetics Products

Country Guide: Japan

Executive Summary

Japan is one of the world's largest markets for cosmetics and personal care products, and has a long tradition of using cosmetics, making Japanese cosmetics manufacturers highly competitive. Japanese consumers today are highly sophisticated and conscious of quality, product value, and the brands they buy and use.

At approximately $13.2 billion in total sales in 2016, Japan is among the top five largest national markets for personal care and cosmetics products. This standing continues despite the recent recessions in Japan and five years of depreciation of the Japanese Yen against U.S. Dollars. As illustrated in Table I, this depreciation has impacted U.S. cosmetics and personal care exports to Japan. While the U.S. is the third largest exporter to Japan, with $491 million in exports in 2015, the devaluation led to a shrinking of the total value of U.S. exports. From 2012 to 2015 the Yen devalued by over 30%, while overall U.S. exports declined 14% in value, resulting in approximately a 15% decrease in the total volume of U.S. product shipments to Japan. Other major importing countries to Japan, experienced similar volatility in their exports to Japan, with the exception of China which gained six percent market share from 2010 to 2015 as Japanese consumers became more value minded in their consumption.

This volatility in U.S. exports exhibited in all cosmetics and personal care product categories. With the Yen slowly regaining value in 2016, this decline now seems to be reversing, with the most recent trade data from April 2016, showing that the year over year U.S. exports to Japan of makeup and skin care products are up 13% from 2015.

From the viewpoint of both market size and trend introduction and adoption, Japan can be regarded as a gateway to other Asian markets. Success in the Japanese market can raise the profile and visibility of a product and its brand across Asia.

Overview of the Domestic Market

Per capita, Japanese are among the most prolific consumers of cosmetics, with the total market valued at $13.2 billion in 2015. In 2014, the Japanese averaged $223 per capita in annual cosmetics consumption, compared to $139 in the U.S., $171 in France, and $174 in South Korea. This standing in terms of total continues despite the recent recessions in Japan and five years of depreciation of the Japanese Yen, which pulled down total cosmetics and personal care imports in the sector by eight percent. Japan is among the top five national markets globally for cosmetics and personal care products. From the viewpoint of not only the size but also the trends and market demand, Japan can be regarded as a gateway to other Asian markets. Success in the Japanese market can raise product/brand profile and visibility, particularly in other Asian markets.

Table 1: Japan's Domestic Cosmetics Market (Millions)[11]

	2011	2012	2013	2014	2015
Total Consumption, Yen	1,402,415	1,470,514	1,507,715	1,551,609	1,598,850
USD$	17,596	18,423	15,448	14,674	13,208
Domestic Shipments, Yen	1,367,518	1,403,368	1,428,690	1,486,786	1,568,683
USD$	17,158	17,582	14,638	14,061	12,959
Imports, Yen	166,653	191,884	214,893	217,145	237,940
USD$	2,091	2,404	2,202	2,054	1,966
Export, Yen	131,756	124,738	135,868	152,322	207,773
USD$	1,653	1,563	1,392	1,441	1,716
Exchange Rate Yen to $USD	79.70	79.82	97.60	105.74	121.05

Source: Ministry of Economy, Trade and Industry, Trade Statistics of Japan

Note: Exchange rates are annual average rates January thru December

Market Demand

Japanese consumers are very sophisticated and particular about the quality and safety of the products they buy and use and Japanese cosmetics companies such as Shiseido and Kao are among the largest globally. In 2015, domestic production represented approximately 70% of national consumption. The recession and subsequent job insecurity has created a trend of frugality, and consumers are becoming even more selective and value conscious, shifting in part to lower priced cosmetics produced in China. It is important to understand that advertising claims are more restrictive in Japan than in the U.S. For example, efficacy claims using statistical data are not yet allowed. Therefore, product image, texture, and scent may play a greater role in the purchase decision than in the U.S. Products must be nicely designed, packaged, and promoted. Consumer needs and tastes may change with seasonal trends and fashion changes, and they may be eager to try something new and different from time to time, as long as products and value propositions are appealing.

As described in more detail in the Best Prospects section, key products are aging-care, skin lightening, and skin moisturizing cosmetics and toiletries. Popular items for Japanese consumers are those products of high performance, quick-acting skincare products and/or crossover products with multi-appeal

[11] The cosmetics market" is defined here as skincare (HS3304.91-99), hair care (HS3305.10-90), makeup preparations (HS3304.10-91), fragrance (HS3303.00), and toiletry goods such as pre-and after-shaving, bath salts, etc. (HS3307.10-90).

attributes. Quick-acting spot skincare products for specific parts of the body are also popular items. Furthermore, organic or natural products, luxury products, and unique or branded products are in demand in the marketplace. Men's skincare and personal care products are drawing an increasing amount of attention in the Japanese marketplace.

In addition, consumers in Japan are very particular about the design and finishing touches (quality) applied to packaging. Also, their needs and tastes may change with seasonal trends and fashion changes. Thus, in cultivating and attracting consumers, new foreign brands may need to invest in developing brand awareness, as well as in user education. Cosmetics importers suggest that they are not interested in taking a look at a new products or brands presented to them unless the product is sharp looking and has an "attention getting story" to tell (i.e., how the concept has been developed, famous people who use it, unique characteristics, etc.).

This is because consumers do not just buy a cosmetics product, but rather buy the total value -- or total appeal -- of the product. Industry sources suggest well-known celebrity endorsements may contribute to a successful launch.

Industry sources are cautiously optimistic about the business environment for cosmetics in 2016, but watching carefully about the foreign exchange fluctuations which will affect their bottom lines. Based on the constant exchange rate, the industry expects the overall market in 2016 will maintain at least 2015 levels, and probably post a modest increase.

Best prospects include:

Skincare products with high performance and multi-appeal attributes in the following specific appeal areas such as aging-care, skin lightening, and skin moisturizing as well as quick-acting spot skincare. In line with the South Korean trend for multi-step care regimes, serums, ampoules, essences within facial moisturizers and anti-agers are benefitting from this trend, as are facial masks. Products with multiple functions (e.g. BB creams or "all-in-one" creams) are especially popular.

Make-up preparations particularly mascara with moisturizing, thickening, curling, or other special features. Mineral make up products are gaining popularity. Cleansing products that wash off makeup easily and gently, as well as makeup that is easy to wash off is also increasing in popularity.

Together makeup and skin care products currently comprise 28% of Japan's imports in the personal care sector.

Natural, organic products in particular for sensitive skin and troubled skin are becoming more popular in various channels and price ranges.

Men's skincare and personal care products, such as cleansing foam, toning lotion, moisturizing emulsion, skin revitalizer, anti-shine refresher, deep cleansing scrub, hydrating lotion, eye soother, tanning lotion, fragrance, and deodorant products.

Fragrances, especially new product launches with a light-feel scent.

Key Suppliers

No official information is available on how many cosmetics manufacturers and importers exist in Japan. Industry sources estimate that there are approximately 4,000 companies with 130,000 brand items being distributed in Japan today. Major Japanese cosmetics manufacturers include Shiseido (*http://www.shiseido.co.jp*), Kanebo (*http://www.kanebo-cosmetics.co.jp*), and Kosé (*http://www.kose.co.jp*). They are the "Big Three" in Japan's cosmetics industry, and cover market segments from highly prestigious brands to economy self-selection brands. In addition, there are major niche players in some product segments. Major foreign brand companies in Japan include P&G, AVON, ESTÉE LAUDER, L'ORÉAL, REVLON, and LVMH, to name a few.

There are many new entrants to the cosmetics market, such as drug companies, food and beverage manufacturers, and a photo film maker. These companies launch new skincare products capitalizing on their technological expertise such as biotechnology/nanotechnology, fermentation technology, or anti-oxidation technology. For example, Fujifilm entered the Japanese skincare market making full use of its technological expertise in using collagen as a raw material and for anti-oxidation processes. These nanotechnologies are a by-product of manufacturing photo films to prevent fading. Furthermore, it is not unusual that retailers launch their own brand with the help of contract manufacturers. A leading catalogue house, Senshukai, recently launched a hair care product which they developed internally. Furthermore, contract manufacturers are creating their own brands in search of market opportunities. More new entrants means increased competition, leading to innovative products and new ingredients that further vitalize the industry as a whole.

Prospective Buyers

Cosmetics are distributed in Japan through the following four channels. An industry source estimated the share of each channel for the last four years as follows:

Table 2: Japanese Cosmetics Shipment by Distribution Channel (Percentage)[12]

	2010	2011	2012	2013	2014	2015
Counseling-Based System Sales	29.6	28.6	27.8	27.3	27.6	27.9
General Distributorship	34.4	34.6	34.7	34.6	34.6	35.0
Direct Marketing (Non-store)	27.7	28.2	29.1	29.7	29.4	28.7
Others	8.3	8.6	8.4	8.4	8.4	8.4

Source: Syukan Syogyo Jan. 1, 2016

High-prestige brands, including U.S. and European brands, are usually placed in the company-owned retail channel or in some form of voluntary chain store network employing a counseling-based selling system (department store counters, cosmetics specialty stores, and boutiques). In such cases, the manufacturer deals directly with its own accounts through its own sales force or subsidiaries.

However, general distributorship is the most conventional channel, with products flowing from manufacturer to wholesaler to retailer. In this system, the manufacturer delegates distribution to the

[12] Note: "Others" includes institutional/professional channels such as aesthetic salons, spas, beauty salons and barber shops supplied directly by manufacturers or through distributors/wholesalers. Some cosmetics and toiletries are sold to the customers of these establishments.

wholesaler/distributor and supports marketing via advertising and promotion. Consumers go directly to the store shelves where they look for the cosmetics of their choice, and no individualized professional counseling is offered.

While products traditionally marketed through this channel have typically consisted of daily necessities such as basic cosmetics and hair care items at relatively low prices, the variety of cosmetics distributed through this system is expanding. Many imported cosmetics are distributed via this general distributor system. A wholesaler imports products directly and supplies them to retailers, or an importer brings in a product from an overseas manufacturer and supplies it to wholesalers, who supply the retailers.

The direct marketing channel includes traditional door-to-door sales, TV shopping, mail order (catalog) sales, and Internet shopping. Avon, Amway, and Nu Skin are traditional door-to-door companies having a legal presence in Japan, but it appears that growing numbers of imported cosmetics brands are focusing more on this channel because of its relative ease to gain quick access to the market (consumers) compared to other channels.

Representative retail prices (USD)

Products	Mass Market		Premium	
	Low	High	Low	High
Perfume	2.00	100.00	12.00	430.00
Lipstick	1.00	18.00	22.00	200.00
Eyeshadow	1.00	15.00	12.00	150.00
Mascara	1.00	20.00	22.00	67.00
Sunscreen	1.00	35.00	23.00	550.00
Bronzer/Blush	1.00	23.00	10.00	77.00
Skin Cream	1.00	18.00	38.00	511.00
Shampoo/Conditioner	4.00	18.00	16.00	41.00
Hair Styling Product	2.00	20.00	16.00	340.00
Deodorant	1.00	15.00	21.00	120.00
Nail Polish	1.00	20.00	15.00	69.00
Shaving Prep	3.00	6.00	13.00	65.00

Price mark ups and the distribution of margins between the manufacturer, wholesaler, distributor and others are dependent on the market channel. A summary of how prices are determined by channel follows:

General Distribution

Manufacturer 20%,   Distributor (Brand manager) 20%, Wholesaler 20%, Retailer 40%

General distribution channel is the most conventional channel, with products shipped from domestic manufacturer to wholesaler to retailer. In this system, the manufacturer delegates distribution to the wholesaler/distributor and supports marketing via advertising and promotion. For foreign cosmetics, unless a Japanese subsidiary is established, foreign manufacturer relies on a distributor (often importer of the record) that manages branding and promotions, keeps inventory and develops retail accounts.   If necessary, distributor relies on a wholesaler or sub-distributor for wider distribution outreach. Life-style

Brand Products
Manufacturer 70%,   Retailer 30%

High-prestige brands, including U.S. and European brands, are usually placed in the company-owned retail channel or in some form of voluntary chain store network employing a counseling-based selling system (department store counters, cosmetics specialty stores, and boutiques). In such cases, the manufacturer deals directly with its own accounts through its own sales force or subsidiaries that manage branding, logistics and retail management including professional beauty advisors.

"Off-the-Shelf" (or "Self-selection") Products
Manufacturer 40%,   Wholesaler 20%, Retailer 25%,   Discounts 15%

While products traditionally marketed through this channel (supermarkets, general merchandise stores, drug stores, etc.) have typically consisted of daily necessities such as basic cosmetics and hair care items at relatively low prices often come with discounts or mark down, the variety of cosmetics distributed through this system is expanding. A wholesaler imports products directly and supplies them to retailers, or an importer brings in a product from an overseas manufacturer and supplies it to wholesalers, who supply the retailers.

Direct Marketing
Manufacturer 60%, Direct marketer 40%

The direct marketing channel includes traditional door-to-door sales. Avon, Amway, and Nu Skin are traditional door-to-door companies having a legal presence in Japan. Also this channel includes TV shopping, mail order (catalog) sales, and Internet shopping.   It appears that growing numbers of imported cosmetics (and/or importers/distributors) are focusing more on this channel because of its relative ease to gain quick access to the market (consumers) compared to other channels.

Trends in US Imports and Competing Products

The recent recession in Japan and five years of depreciation of the Japanese Yen against U.S. Dollars, impacted all importing countries exports in cosmetics and personal care products to Japan. The increase in purchases of Chinese products is likely due to the shift among Japanese consumers to more valued based principals in their shopping choices. While the U.S. is the third largest exporter to Japan, with $491 million in exports in 2015, the devaluation led to a shrinking of the total value of U.S. exports. From 2012 to 2015 the Yen devalued by over 30%, while overall U.S. exports declined 14% in value, resulting in approximately a 15% decrease in the total volume of U.S. product shipments to Japan. Other major importing countries to Japan, experienced similar volatility in their exports to Japan, with the exception of China which gained six percent market share from 2010 to 2015 as Japanese consumers became more value minded in their consumption.

Table 12: Imported Products Share of Japan's Personal Care and Cosmetics Market (Millions)

Importer	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	$568	14%	$520	13%	$491	13%
France	$601	15%	$582	14%	$557	15%
U.K.	$113	3%	$123	3%	$125	3%
South Korea	$159	4%	$159	4%	$143,068	4%
Thailand	$591	14%	$313	8%	$215	6%
China	$857	21%	$896	22%	$901	24%
EU 28 (except France, U.K)	$86	2%	$72	2%	$16	0.42%
Other Countries	$1,170	28%	$1,384	34%	$1,376	36%
Total Imports	$4,145	100%	$4,048	100%	$3,829	100%

U.S. Exports to Japan

Across all product categories U.S. products saw declining share, in line with lower levels of purchases of U.S. products due to the devaluation of the Yen. The two exceptions are color cosmetics and hair care, which are discussed here.

Hair care products were a bright spot for U.S. imports as illustrated in Table 14, with a shift away from colorants and other products that change the appearance of the hair to focus on glossy and frizz-free, natural hair. Damage care products are proving particularly popular among younger consumers in their 20s and 30s, while older consumers are more focused on scalp care and anti-ageing products. U.S. exporters fair well in these types of hair care products.

Color Cosmetics

Japanese women use fewer color cosmetics, vis-a-vis their U.S. counterparts, as they are focused more on skin care and complexion. As a result more color cosmetics products are multi-function, offering skin care benefits as well. As Japan’s population continues to age other trends include pigmentation softening and skin plumping. U.S. lipstick products performed particularly well in this regard over the last three years.

See the following tables for more information on the U.S. and competing countries exports to Japan:

Table 3: Japan Total Personal Care and Cosmetics Imports
Table 4: Japan Imports of Personal Care and Cosmetics Products from the U.S.

Top Domestic Trade Fairs

DIET & BEAUTY FAIR ASIA & SPA & WELLNESS JAPAN
Date: September
Venue: Tokyo Big Sight, Tokyo
Organizer: UBM Japan Co., Ltd.
Phone: 81-3-5296-1013, Fax: 81-3-5296-1018
URL: http://www.dietandbeauty.jp/en/, http://www.spaandwellness.jp/en/

BEAUTYWORLD JAPAN WEST
Date: October
Venue: Intex Osaka, Osaka
Organizer: Messe Frankfurt
Phone+81-3-3262-8939, Fax: +81-3-3262-8442
URL: http://beautyworld-japan-west.jp.messefrankfurt.com

COSME TOKYO/COSME TECH 2017 (U.S. DOC Certified Trade Fair)
Date: January 23-25, 2017
Venue: Tokyo Big Sight, Tokyo
Organizer: Reed Exhibitions Japan, Ltd.
Phone: +81-3-3349-8519, Fax: +81-3-3349-8530
URL: http://www.cosmetokyo.jp/en/
http://www.cosme-i.jp/en/Home/

BEAUTYWORLD JAPAN 2017
Date: May 15-17, 2017
Venue: Tokyo Big Sight, Tokyo
Organizer: Messe Frankfurt
Phone+81-3-3262-8939, Fax: +81-3-3262-8442
URL: http://beautyworld-japan.jp.messefrankfurt.com/tokyo/en/exhibitors/welcome.html

HEALTH & BEAUTY PRODUCTS EXPO TOKYO 2017
Date: July 5-7, 2017
Venue: Tokyo Big Sight, Tokyo
Organizer: Reed Exhibitions Japan Ltd.

Phone +81-3-3349-8519 Fax: +81-3-3349-8530
URL: http://www.hb-expo.jp/en/

Regulations, Standards, Customs and Tariffs

Japan's Pharmaceutical and Medical Device Law (the "PMDL"), formerly known as the Pharmaceutical Affairs Law (the "PAL") governs the cosmetics industry in Japan. According to the PMD, made effective in April 2005, a company that intends to market or import cosmetics products must obtain a license for marketing cosmetics on a commercial basis *("keshohin seizoh hanbaigyo no kyoka" in Japanese)* from the appropriate local government offices for each business office location. For the company that intends to manufacture cosmetics, a license for manufacturing cosmetics *("keshohin seizogyo no kyoka")* must be obtained for each manufacturing location.

To obtain a license for marketing cosmetics on a commercial basis, an applicant company is required to comply with GQP (Good Quality Practice) and GVP (Good Vigilance Practice) in terms of quality control and post-marketing safety management in accordance with the standards specified by MHLW (Ministry of Health, Labor, and Welfare) Ministerial Ordinances. To apply the applicant company must have a Product Quality Manager *("hinshitsu hoshoh sekininsha")*, a Safety Control Manager *("anzen kanri sekininsha")*, and a General Marketing Business Controller *("sokatsu seizoh hanbai sekininsha")*. The General Marketing Business Controller, who supervises the other two managers, must be a licensed pharmacist or a specialist who has completed university-level or equivalent pharmacology or chemistry courses. A manufacturer of cosmetics must designate a responsible engineering manager who supervises practical manufacturing of cosmetics for each manufacturing establishment.

The law does not yet permit a foreign company to make direct application from overseas for a license to market cosmetics products to Japan. Thus, a U.S. company that wishes to export its products to Japan first must find a qualified Japanese importer or representative or it must set up a Japanese subsidiary. Upon receipt of the manufacturing or marketing license, the applicant company needs to file a notification of the product to be manufactured or imported.

PMDL also stipulates that containers or wrappers of cosmetics products shall show the name and address of the marketer, name of product, production number or production code, name of cosmetic ingredients contained, the shelf life of cosmetics if the product concerned is not stable for three years, and other information required by MHLW ordinance.[13]

It is important for U.S. exporters and manufactures to note that some ingredients listed on the positive list are allowed only for limited uses in Japan, even if they have been widely used in other countries. For example, formaldehyde-donor-type preservatives (Imidazolidinyl Urea and DMDM Hydantoin) are not

[13] A full ingredient listing on the container as required in the United States was put into force in Japan on April 1, 2001. Also, MHLW implemented Positive and Negative Lists of cosmetics ingredients. Accordingly, ingredients, the safety of which have been confirmed, can be mixed freely in a cosmetic product at the responsibility of the manufacturer or the marketer concerned, as long as the finished product meets the definition of cosmetics as described in the Pharmaceutical Affairs Law.

permitted in Japan with the exception of rinse-off type products, e.g., shampoos (warning labels are required for products containing these preservatives). Quaternium-15 is not approved in Japan. At the moment, suppliers who discover that their products do not meet existing standards usually seek resolution of their problems through product reformulation. This avoids complications with MHLW's strict requirements for safety and supporting data.

Import duties for cosmetics range from zero (HS: 3303, 3304, 3305, 3401) to 5.4 percent (HS: 3307). If the Trans-Pacific Partnership Trade Agreement is ratified by the U.S. and Japan, these tariffs will be eliminated immediately.

The Annex to this report provides an overview of the requirements to sell cosmetics in Japan.

Several helpful publications in English are available from Yakuji Nippo (fax: 81/3/3866-8408, URL: http://www.yakuji.co.jp/). The regulatory agency for the cosmetics and toiletry products is the Ministry of Health, Labor and Welfare (MHLW), Pharmaceutical and Food Safety Bureau, Evaluation and Licensing Division *or "Shinsa Kanri-ka"* in Japanese (phone: 81/3/3595-2431, fax: 81/3/3597-9535 URL: http://www.mhlw.go.jp/).

Resources & Contacts

Japan Cosmetics Industry Association	http://www.jcia.org
Cosmetics Importers Association of Japan	http://www.ciaj.gr.jp
Personal Care Products Council	http://www.personalcarecouncil.org/
American Chamber of Commerce in Japan	http://www.accj.or.jp/
Japan Nailist Association	http://www.nail.or.jp

The U.S. Commercial Service in Tokyo, Japan can be contacted via e-mail at: Tokyo.Office.Box@trade.go Phone: 81-3-3224-5074; Fax: 81-3-3589-4235; or visit our website: http://www.buyusa.gov/japan/en/

For More Information:

Chris Y. Ono, Senior Commercial Specialist

U.S. Embassy, Tokyo

1-10-5 Akasaka, Minato-ku,

Tokyo 107-8420, Japan

Tel: 81-3-3224-5074

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Personal Care & Cosmetics Products

Country Guide: Malaysia

Executive Summary

Malaysia's total trade volume for personal care and cosmetics products was about US$2.24 billion in 2015. Over 50% of this demand was met by US$1.13 billion in imports. In descending order, China, Thailand, France, the EU28, the United States, South Korea and Japan are the main exporters to Malaysia. Skin-care products (including sunscreen and after sun care) command the biggest market share with a total import value of US$292 million. This is followed by cosmetics and toilet preparations (including shaving, bath preparation and deodorants) with a value of US$109 million. Third highest import category for Malaysia are soaps and other skin-wash products, valued at US$104 million.

Over the past three years the United States' exports to Malaysia grew by 25%, with an average annual of 9% over the past five years.

Overview of the Domestic Market

Size and Growth Trends in the Domestic Industry

Despite the concurrent appreciation of the U.S. dollars and the devaluation of Malaysia's currency (Ringgit Malaysia) in 2015 and 2016, and slowdowns in government spending, exports to Malaysia have continued to grow over the past five years albeit at a slower rate. Imports of cosmetics and particularly U.S. products have been undeterred by the slowdown, with U.S. product imports increasing by 25% over the past three years. As growth in the Malaysia's economy picks up, personal care and cosmetics imports are expected to grow.

The domestic production of cosmetics and toiletries products in Malaysia has been increasing its foothold in the market. There are two categories of domestic manufacturers: multinational companies (MNCs) and domestically owned entities. Major MNCs either have sales office and/or manufacturing facilities in-country/ or regionally with the majority of them focused on the mass consumer markets.

While some local manufacturers produce and own their house brands, a big proportion of them focus on contract/ private label manufacturing. There are 210 cosmetic manufacturers in Malaysia who conform to the Good Manufacturing Practices (GMP) requirement in accordance to the ASEAN Guidelines for Cosmetics.

According to the Malaysian External Trade Development Corporation (MATRADE) in 2015 Malaysia's domestic manufacturers exported RM1.124 billion/ about US$270 million worth of cosmetics and toiletries. It is MATRADE's hope to increase this number by 5% for 2016. Jan-August 2016 domestic exports amounted to RM809 million/ US$194 million.

In the cosmetics and personal care sector, the make-up and skin-care product categories exhibit the greatest demand. In recent years, a significant number of local skin-care companies are shifting towards having their own private label skin care and color cosmetics brands rather than representing foreign brands. This is especially true for the skin-care products targeting the medical professional channels like dermatologists, and plastic surgeons. In Malaysia, the majority of products are sold via spas and salons, retail stores, and multi-level marketing/direct selling channel.

Malaysia Total Personal Care and Cosmetics Imports

HTS Code	Description	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Imports
3301	Essential Oils	$16,275,132	$19,908,867	$19,482,308	8%	20%	2%
330290	Fragrances & Substances Used as Inputs	$71,731,889	$79,833,951	$70,858,721	4%	-1%	6%
3303	Perfumes And Toilet Waters	$94,675,338	$100,810,979	$87,010,086	-4%	-8%	8%
3304	Make-Up & Skin-Care Preparations	$294,796,700	$292,996,168	$291,888,088	-2%	-1%	26%
3305	Hair Care Products	$122,863,893	$104,811,273	$93,617,158	-2%	-24%	8%
3306	Oral & Dental Hygiene	$82,366,124	$90,271,076	$78,483,828	1%	-5%	7%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$109,440,248	$115,146,743	$108,757,686	0%	-1%	10%
3401	Soap & Other Products to Wash the Skin	$101,896,175	$108,839,692	$103,507,300	2%	2%	9%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$44,625,538	$45,762,794	$50,029,282	6%	12%	4%
4818	Personal Care Wipes, Diapers, Tampons	$32,693,619	$33,853,854	$31,021,045	-24%	-5%	3%
5601	Sanitary Towels and Napkins	$29,523,585	$32,105,595	$32,262,989	4%	9%	3%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$43,959,100	$43,988,159	$57,040,585	4%	30%	5%
9605	Toilet Sets for Personal Travel	$4,752,439	$4,629,647	$4,617,055	15%	-3%	0%
9619	Diapers and Fem Hygiene	$108,072,458	$103,705,193	$96,483,874	NA	-11%	9%
	Total Imports	$1,157,672,238	$1,176,663,991	$1,125,060,005	0%	-3%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Consumer Profile

As of 2016, Malaysia's population size is 31.3 million. Malaysia's "15-64" age group makes up two-thirds of the population with per capita income of US$9,766 (2015). Other than the typical Malaysian consumers of mass market FMCG cosmetic and toiletries that include both sexes of the population; the consumer profile of Malaysian can roughly be categorized into age group, household income level, and if they are urban/ rural population. About 70% of Malaysians are urban dwellers. The bulk of job opportunities are centered in the highly urbanized cities of Kuala Lumpur, Penang, and the Johor region near Singapore. It is also this group that has higher disposable income to consume imported products. Malaysia is also seeing increasing demand for skin-care and grooming services by the urban male population. High female work force participation (46.8% according to World Bank), better education, overseas exposure and familiarity with foreign cosmetics and skin care brands, and knowledge of the basics of skin-care regimen are all factors that bode well for U.S. companies planning to do business in Malaysia.

The younger generation females tend to purchase the Korean branded products due to the massive advent of K-pop and K-drama in Malaysia. Further, the price point for Korean cosmetics and personal care products that are available in-country are more affordable in comparison to the U.S., EU, Australian and Japanese products. The typical profile of this consumer group is in this age group of 12-25 range, female, with a high school or higher education level, urban dwellers who resides in middle to upper-middle income households. The number of skin-care products used for this age group is around three to four, at most five including: cleanser, toner, moisturizer, sunscreen, and acne treatment. In terms of hair-care usage, it's about 2-3 products: shampoo, conditioner and hair serum. The number of products used is reduced if they serve dual or more functions, i.e. BB or CC creams. Sunscreen/ whitening/ brightening skin-care products are major selling points in this market. Main purchase influencers are friends, social media and YouTube beauty bloggers and vloggers. Malaysian males in this age group usually are simpler and tend to use mass market brands in terms of skin-care products. They typically use one to two face care products: cleanser and acne treatment. Malaysian men are also very focused on hair- styling products. The number of hair products used is comparable to their female counterpart, in the range of 2-3 as well: shampoo, conditioner, and one hair styling product (hair-mud/ styling clay/ hair gel etc.) To date, they have not fully embraced the metrosexual focus.

The 25-54 age group is more open to U.S., EU, Australian and Japanese products. The household income level is also a major deciding factor in the consumption habits of this group. The profiles of consumers using U.S. products are urbanites living in upper-middle income households, generally college educated overseas, and are familiar/exposed to western skin-care brands. Men are more inclined towards basic grooming, and a big proportion can be classified in the metrosexual category. Female consumer profiles of U.S. products are similar to their male counterparts, except that they are more discerning and trend towards natural cosmeceuticals. The female to male consumer ratio for facial/ spa treatment is around 3:1. The number of skin-care products used for this age group can be upwards of eight products for females. Daily rituals include double cleanse, tone, essence and/ or serum, eye cream and face cream, sunscreen, and the weekly scrub and mask. The number of products used by the male counterpart is slightly less than the female. The main influencers are facial and spa treatment centers, retail outlets, direct selling companies, and friends. There are also two categorical groups about men in this segment: those that take care of their skin and thus would use comparable number of products as just described (albeit slightly less); or those that just cleanse their face and do little else. Malaysia is located in the tropics and its climate is hot and humid. Thus, it is very important the products formulated for this market does not leave a tacky after feel and can withstand heavy humidity.

As for the institutional buyers, they can be divided into two categories: those that will promote a foreign brand name/ trade mark, and those that wish to promote their own private label.

Distribution Channels and Marketing

Mass market cosmetics and toiletries are usually sold in pharmacies and supermarkets. A smaller range of these products can be found in most mom-and-pop convenient stores and mini markets. The high-end and premium brands are usually sold in department stores and stand-alone retail stores and kiosks. Salon and spa brands are frequently marketed directly to the beauty salons and spa businesses. The distributor or agent would commonly have sales personnel make sales calls to the salons and spas. Organic/ natural/ specialty and some cult cosmetic brands are generally sold in standalone stores and organic stores in the various shopping malls. E-commerce is emerging rapidly in the local marketplace, with social media both to research and to conduct cosmetics purchasing increasingly popular.

There is high prevalence of cosmetics and toiletries being sold via the multi-level marketing (MLM)/ direct sales distribution channel in Malaysia. Typically, the MLM companies have their own private labels. They either buy in bulk or repackage the local and/or foreign-sourced products. Some of the cosmetic/ toiletries/ personal care MLM corporations in Malaysia are: Amway, Avon, Cosway, Nu Skin, Nutri-Metics and Mary Kay. Amway and Cosway (a subsidiary of a Malaysian conglomerate and MLM corporation with international presence) are the market leaders.

Examples of various brands available in the market are listed per retail chain below:

Departmental stores: SK-II, Clinique, Shisheido, Christian Dior, Chanel, Kanebo, Biotherm, Clarins, L'Occitane, Laura Mercier, Cosme Decorte, Origins, Haba, Jurlique, StriVectin, N.V. Perricone M.D., Dr. Sebagh, Dior, Lancome, Estee Lauder, Kose, Bobbi Brown, Shu Uemura, Dr.Ci:Labo, Anna Sui, RMK, Sisley, La Prairie, Guerlain, Laneige, Davidoff, Burberry, etc.

Salon/ Spa brands: Sothys, Thalgo, Phytomer, Guinot, Dermalogica, Jeanne Piaubert, Swissline, Casmara, Eve Taylor, Selvert Thermal, Technologia e Natura (TeN), Obagi, Pervonia, etc.

Specialty/ Niche/ Cult/ Organic brands: Aesop, Anick Goutal (fragrance), Avalon, Kiehls, Burt's Bees, Neal's Yard Remedies, Melvita, Diptyque, Caudalie, T Le Clerc, Three Cosmetics, Innisfree, etc.

Pharmaceutical brands: Neo Strata, Vichy, Avene, RoC, Eucerin, Sebamed, Neutrogena, Hado Labo, etc.

Nail Polish: Maybelline, Revlon, L'Oréal, Sally Hansen for mass market brands. OPI and Jessica are the two popular professional brands in the market. Bandi Nail, China Glaze, E Jasi and Gelly Fit are now in-country.

Hair care products are sold in the mom-and-pop grocery stores, mini markets, pharmacies, supermarkets, and hypermarkets. Organic hair products are usually sold at specialty organic stores, or at select high-end grocery stores. Professional hair care products are sold mostly at hair salons and specialty professional hair care retail stores

Product Trends

Typically, mass market/ value pricing products do better compared to premium products due to pricing. Premium brands are inherently self-limiting in terms of market share, given that only upper-middle income Malaysians can afford these products. Across the board, the main skin-care concerns cited by most Malaysians falls under whitening/ lightening/ brightening of blemish and acne scars, and anti-aging. Anti-aging cosmeceuticals is the most sought after skin-care range. Noninvasive anti-aging products and therapies are best sellers in the salon and spas business. Other anti-aging treatments provided in the market are the use of ampoules, serums, mesotherapy, cosmeceuticals, Microdermabrasion, Intense Pulse Light (IPL), and Tripolar Radio Frequency Therapy etc.

There is a rising demand for shine-free and anti-blemish products. Oil-free hydration is highly in demand in comparison to any single store keeping unit (SKU) out of the entire skin-care product mix. Product formulations that provide matt/ silky, non-tacky, and powdery finish type of products would do well in a hot & humid tropical country, like Malaysia. Its populace is also concerned about pigmentation, darkening of the skin tone, and skin cancer making sunscreen in high demand.

The majority of the mass market cosmetics and toiletries available in the Malaysian market place are either manufactured domestically or in the ASEAN region. Market leaders for cosmetics in the fast moving consumer goods (FMCG) segment are the multinational corporations (MNCs). Unilever, L'Oréal, and Proctor and Gamble have strong presences in Malaysia. Popular mass market brands available in the market are mostly from the United States: Cover Girl; Maybelline; L'Oréal; etc. Popular higher priced color cosmetics brands available in the market are mainly from the Estee Lauder Companies, Moet Hennessy Louis Vuitton, and Chanel. As for manicure and pedicure preparations, OPI is market leader.

In the case of private label skin-care market, the current trend is to have the products formulated overseas (EU and U.S. are the major product formulators) and the final product assembly and packaging is performed in-country. The reason are: bulk container purchase is cheaper as it would involve less shipping cost; further, the cost of packaging is lower in Malaysia; plus having part of the packaging and assembling done in Malaysia allows it to take advantage of regional intra-ASEAN incentives (Association of ten South-East Asian nations). However, the domestic market perception of these locally packaged and manufactured products is not as favorable as those coming directly from overseas, due to product quality, stability and contamination issues. Private label products both formulated and manufactured by the more economically developed countries (MEDC) are perceived to be significantly of higher quality.

Market perception of U.S. skin-care is that most of its products are primarily focused on skin rejuvenation, renewal and peeling. This rejuvenation process is achieved by the use of acids, i.e. AHA, BHA and other acids such as lactic and fruit, as well as enzymes. Doctor brands (products bearing a Doctor's name) are rather popular and organic/ natural skin-care are gaining market acceptance.

Other than skin-care and color cosmetics, manicures and pedicures are gaining increasing market acceptance. Nail salons providing manicure, pedicure and nail art treatments are increasing in the major urban and suburban areas. These nails salons are usually located in most middle to high-end shopping malls. Some standalone hair salons and spas also provide manicures and pedicures in major business parks and commercial shop-lots. Popular nail treatment and nail polish used in these salons are OPI and Jessica. U.S. professional nail brand China Glaze is available in the market and is a relatively new entrant to Malaysia. Additionally, more South Korean nail care brands like Bandi Nail and Gelly Fit are making inroad into Malaysia. Popular mass market nail polish and nail care brands are L'Oréal, Maybelline, Revlon, and Sally Hansen etc.

As a general rule of thumb, local distributor pricing strategy is five times the cost of distributor/wholesale pricing compared to consumer pricing.

Rough estimates of basic cosmetics retail pricing in US$ below:

Products	Mass Market		Premium	
	Low	High	Low	High
Perfume	10	15	47	120
Lipstick	6	13	20	24
Eye Shadow	6	13	20	24
Mascara	10	18	17	22
Sunscreen	14	19	24	50
Bronzer/Blush	10	14	24	28
Skin Cream	12	15	26	48
Shampoo/Conditioner	5	7	23	36
Hair Styling Product	8	10	19	24
Deodorant	7	10	25	36
Nail Polish	3	7	21	26
Shaving Prep	5	12	22	47

Due to the industry trend shifting towards private labeling, in order for the U.S. brands with online presence to do well in Malaysia they need to ensure their international pricing is harmonized to their U.S. online prices. Malaysians are getting savvier with online shopping and would typically do a cost comparison between local and U.S. prices. If the foreign distributor is charging an unreasonably high premium compared to the U.S. pricing, then the distributor may face resistance to their pricing model in Malaysia. Also, some distributors have indicated reluctance in taking U.S. brands with online presence if these distributors are unable to match or offer as close as the U.S. product pricing. It would be ideal if U.S. companies work with the foreign distributor and have its products placed in the Malaysian market within and/ or not exceeding 10-15% U.S. Manufacturer's Suggested Retail Pricing (MSRP).

Another recent market development of note in Malaysia is the emergence of Islamic Sharia law compliant or Halal cosmetics, which in Malaysia are governed by Halal Cosmetics Standard MS 2200: 2008. Halal cosmetics are not allowed to contain porcine animal byproducts, and are typically alcohol free. If other forms of animal byproducts are used, it must be the Sharia compliant. Malaysia sees Halal cosmetics as a platform for alternative or parallel product development to meet the needs of this 60% Muslim majority country. This is seen as a way to stimulate local manufacturing. The ultimate target market for Malaysian halal cosmetics manufacturers is to export to the Middle East. All Halal certification, monitoring and enforcement are performed by JAKIM, the Malaysian Department of Islamic Development.

Overview of the Domestic Market

U.S. Imports and Competitors

The major U.S. skin-care competitors have traditionally been France and Switzerland. Increasingly, South Korea, Japan, Spain, Italy, Australia and New Zealand are all making inroads into the Malaysian market. Swiss skin-care products are perceived to be at the top end of the scale in terms of pricing, prestige and product efficacy. France has long been regarded as the main go-to country for sourcing skin-care products. The Spanish and Italian skin and hair care providers are seen as alternative value EU providers. The Japanese has always been a supplier country of choice for the premium skin whitening/ brightening product category. The Australians have also traditionally been a major skin-care country supplier to Malaysia, given its geographic proximity and a shared British Commonwealth legacy. New Zealand products are perceived to be more green and eco-friendly centric. The advent of K-pop/ K-drama phenomenon has made all things South Korean, including cosmetics, very attractive.

Imported Products Share of Malaysia's Personal Care and Cosmetics Market (Thousands)

Importer	2011	% Market Share	2012	% Market Share	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	$49,637	4%	$55,394	5%	$63,299	5%	$71,123	6%	$78,918	7%
France	$97,261	9%	$109,398	9%	$123,190	11%	$136,614	12%	$110,359	10%
Japan	$35,379	3%	$38,696	3%	$32,511	3%	$34,416	3%	$33,627	3%
EU 28	$111,813	10%	$113,329	10%	$106,299	9%	$114,879	10%	$99,247	9%
China	$111,494	10%	$144,981	12%	$261,888	23%	$318,202	27%	$362,920	32%
Thailand	$201,385	18%	$199,308	17%	$195,183	17%	$26,369	2%	$146,049	13%
South Korea	$36,813	3%	$43,828	4%	$45,136	4%	$56,712	5%	$63,201	6%
Other	$375,451	34%	$349,408	30%	$206,976	18%	$281,734	24%	$120,381	11%
Total	$1,116,495	100%	$1,163,740	100%	$1,157,672	100%	$1,176,664	100%	$1,125,060	100%
Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas										

See the following tables for more information on the U.S. and competing countries exports to Malaysia:

Table 1:Malaysia Total Personal Care and Cosmetics Imports
Table 2: Malaysia Imports of Personal Care and Cosmetics Products from the U.S.
Table 3: Malaysia's Imports of Personal Care and Cosmetics Products from China
Table 4: Malaysia's Imports of Personal Care and Cosmetics Products from Japan
Table 5: Malaysia's Imports of Personal Care and Cosmetics Products from France
Table 6: Malaysia's Imports of Personal Care and Cosmetics Products from Thailand
Table 7: Malaysia's Imports of Personal Care and Cosmetics Products from South Korea
Table 8: Malaysia's Imports of Personal Care and Cosmetics Products from EU 28

Table 9: Imported Products Share of Malaysia's Personal Care and Cosmetics Market
Table 10: HS 34: Make Up Products, US Exports to Malaysia
Table 11: HS 35: Hair Care Products, US Exports to Malaysia
Table 12: HS 37: Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants, US Exports to Malaysia

Top Domestic Trade Fairs

International Beauty Expo, May 6-9, 2017, Kuala Lumpur (http://www.ibe.my/)

- No. of Exhibitors: 400 (expected for 2017)
- No of Registrants: 44,000 (expected for 2017)
- Product Mix at the trade show: Beauty, cosmetics and skin-care, hair and nail, spa and wellness, health and nutrition, and weight management.

Beauty Expo '17, October, Kuala Lumpur (http://www.beautyexpo.com.my/)

- No. of Exhibitors:230 (2016)
- No of Registrants: 18,000 (2015)
- Product Mix at the trade show: Health and Fitness, skin-care and spa, hair, nail, makeup and education, halal cosmetic pavilion, OEM/ contract manufacturing/ private label.

Cosmobeaute 2017, July 17-20, Kuala Lumpur (http://cosmobeauteasia.com/)

- No. of Exhibitors: 253 (2016)
- No of Registrants: 12,316 (2016)
- Product Mix at the trade show: Beauty Salon and Spa, Hair and Nails, OEM/ contract manufacturing/ private label, Aesthetic and Wellness.

Regulations, Standards and Customs

Malaysia Import Duties and Sales Tax of Personal Care and Cosmetics Products			
HTS Code	**Description**	**Import Duty (%)**	**Sales Tax (%)**
3301	Essential Oils	0	6
330290	Fragrances & Substances Used as Inputs	0	6
3303	Perfumes And Toilet Waters	0	6
3304	Make-Up & Skin-Care Preparations	0	6
3305	Hair Care Products	0	6
3306	Oral & Dental Hygiene	0	6
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	0	6
3401	Soap & Other Products to Wash the Skin	0-20	6
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	0-25	6
4818	Personal Care Wipes, Diapers, Tampons	20-25	6
5601	Sanitary Towels and Napkins	20	6
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	5-20	6

9605	Toilet Sets for Personal Travel	5	6
9619	Diapers and Fem Hygiene	0-30	6
Source: Royal Malaysian Customs Department			

Securing the assistance of an agent or distributor is necessary for market entry into Malaysia. Notification with the Malaysian Drug Control Authority for most cosmetics and toiletries products is the next step, and must be done by a Malaysian company/agent/distributor. Once, the product is notified for importation, the appropriate distribution channels are usually determined by the product target market. Further, as over 60% of the Malaysian population is Muslim, U.S. companies that intend to sell to the Muslim consumers should be aware of the local Malaysian Halal requirement. It would be advantageous to have exports Halal certified by the Malaysian entity JAKIM. Halal is defined as what is permissible under the Islamic Sharia Law and Malaysia recognizes two Islamic bodies in the United States. These certifying bodies are:

- Islamic Services of America (ISA), Cedar Rapids, Iowa
- The Islamic Food and Nutritional Council of America (IFANCA), Chicago, Illinois

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Personal Care & Cosmetics Products

Country Guide: New Zealand

Executive Summary

Imports represent approximately 95% of all cosmetic and toiletry products sold in New Zealand.[14] In 2015, New Zealand's imports of cosmetics and toiletries totaled US$565 million. After Australia and China, the United States is the second most important source of cosmetics and toiletries. In 2015, U.S. exports of cosmetic and toiletries to New Zealand totaled approximately US$48 million and represented nearly 9% of all imports.

New Zealand's aging population (4.7 million people), are brand aware, price sensitive and follow international trends closely. The market sector is mature and very competitive. Distribution channels include supermarkets, pharmacies, department stores and direct sellers and the internet. Christmas is the high season for retail sales.

All cosmetic and toiletry products sold in New Zealand need to comply with the New Zealand Cosmetic Products Group Standard to ensure they are safe and legal.

Overview of the Domestic Market

Size and Growth Trends in New Zealand's Cosmetic and Toiletries Industry

Local manufacturers supply approximately five percent of New Zealand's cosmetic and toiletries sector. Many of these organizations have developed a global reputation for specializing in natural formulations e.g. Manuka honey skin-care products. In 2015, New Zealand's cosmetic and toiletry exports totaled just under US$10 million. This country's main export markets for cosmetic and toiletry exports in 2015 were to Australia; Hong Kong; China and the United States.

Sales are spurred by new product launches and trusted brands. CTFA research records approximately 50+ new fragrances are launched in New Zealand annually and approximately 15 are withdrawn. Skin-care, color make-up and beauty products have a range of more than 200 product brands while hair care, body wash and care products number around 100 brands. New and innovative products particularly those focusing on anti-aging products and sun-care treatments ensure the sector is always evolving. Future trends will:

- Continue to center on an aging population

[14] Source: Cosmetic Toiletry and Fragrance Association of New Zealand (CTFA).

- Population changes will shape emerging needs. Population projections show that by 2021, for every 100 people in Auckland, in New Zealand's largest city, 53 will be European, 27 will be of Asian heritage, 17 will be Pacific Islanders and 12 will be Maori.
- Focus on product safety and environmentally friendly products
- An increase in online sales

Consumer Profile

The majority of New Zealand's population is of European descent, with the indigenous Maori being the largest minority (14.6 percent), followed by Asians (9.2 percent) and non-Māori Pacific Islanders (6.9 percent). The median income from wages and salaries across all jobs in June 2014 was about US$33,000 before tax (includes full and part-time jobs). New Zealand households are currently in a spending mode and economic forecasts record that household spending will continue to strengthen as the economy responds to a stronger housing market, population growth (immigration) and lower interest rates. Women are known to shop more regularly than men, and more likely to purchase on behalf of other family members.

Most Important Factors to New Zealanders When Deciding to Buy

Global Brand		**Local Brand**
53	Better Price/Value	43
35	Previous Experience with Product was Good	33
37	On Sale/Promotion	29
30	Product Benefits are Better	32
15	Safer Ingredients and Processing	21

Base: n = 500
Source: Global Brand-Origin Survey published FMCS Business, June 2016

Product Trends

Representative retail prices for the following products (New Zealand Dollars)

Products	Mass Market		Premium	
	Low	High	Low	High
Perfume	$10	$50	$55	$250
Lipstick	$5	$40	$45	$90
Eye Shadow	$5	$40	$45	$60
Mascara	$10	$40	$45	$80
Sunscreen	$20	$20	$55	$55
Bronzer/Blush	$10	$40	$55	$90
Skin Cream	$10	$50	$70	$250
Shampoo/Conditioner	$5	$30	$50	$100
Hair Styling Product	$8	$30	$50	$100

Deodorant	$4	$20	$20	$60
Nail Polish	$4	$40	$40	$60
Shaving Prep	$10	$50	$60	$80

Exchange rate: 1 NZ$ = 72 U.S. cents

Distribution Channels and Marketing

Most New Zealanders live in urban centers where they can readily access cosmetic and toiletries through retail outlets. The Beauty aisle of any nationwide supermarket offers competitively priced, well-respected mid-level brands. New Zealand pharmacies and department stores typically specialize in luxury brands and hire attendants to help with beauty advice. Direct selling which accounts for around 20% of cosmetic and toiletry sales is conducted in a variety of ways, from the party plan to individual one to one selling. Direct selling appeals to people who want to be their own boss. Three-quarters of New Zealanders have access to the internet at home or at work. Among those who have access, nearly 60% use the internet at least once a day. Buying online is popular – many local retailers offer an online shopping option. New Zealand Customs does not collect duty and Goods and Services Tax where the total revenue payable on any one importation is less than US$45.

Social media, magazine and TV advertising influence purchasing decisions. (Advertising is important to raise brand awareness and excitement about products.)

Trends in US Imports and Competing Products

US Imports and Competitors (Thousands)

Importing Countries	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	$47,169	8%	$48,146	8%	$47,877	8%
France	$50,413	8%	$48,528	8%	$41,298	7%
Japan	$4,058	1%	$4,531	1%	$5,158	1%
South Korea	$4,459	1%	$6,300	1%	$6,064	1%
Thailand	$56,590	9%	$55,617	9%	$47,756	8%
China	$65,173	11%	$80,238	13%	$76,493	14%
United Kingdom	$23,932	4%	$25,649	4%	$21,932	4%

EU 28 (Excluding France and UK)	$2,871	0%	$74,176	12%	$63,230	11%
Australia	$226,566	38%	$225,224	37%	$198,857	35%
Other	$116,876	19.5%	$40,549	7%	$56,661	10%
Total NZ Imports	$598,109	100%	$608,959	100%	$565,328	100%

Source: Trade Policy Information System (TPIS), if marked with a *, source is Global Trade Atlas

Under the Closer Economic Relations (CER) Agreement, Australian manufactured products enter New Zealand duty-free. Some U.S. firms manufacture in Australia under license and export to New Zealand under CER. Within the marketplace, U.S. brands are very visible and enjoy a reputation for quality and safety.

Make up and Skin Care, HTS 3304

This is the most significant sector for U.S. exports. U.S. products experienced the most significant growth in beauty and skin care prep and color cosmetics.

Hair Care Products, HTS 3305

Sales of specialty products, including hair spray and other permanent styling products are up.

Toilet and Other Bath Preparations, HTS 3307

U.S. sales across this category are mixed, with the greatest growth in deodorants, antiperspirants and other grooming products.

See the following tables for more information on the U.S. and competing countries exports to New Zealand:

Table 2: New Zealand Imports of Personal Care and Cosmetics Products from the U.S.

Table 3: New Zealand Imports of Personal Care and Cosmetics Products from China

Table 4: New Zealand Imports of Personal Care and Cosmetics Products from Japan

Table 5: New Zealand Imports of Personal Care and Cosmetics Products from France

Table 6: New Zealand Imports of Personal Care and Cosmetics Products from Thailand

Table 7: New Zealand Imports of Personal Care and Cosmetics Products from South Korea

Table 8: New Zealand Imports of Personal Care and Cosmetics Products from United Kingdom

Table 9: New Zealand Imports of Personal Care and Cosmetics Products from EU 28

See the following tables for an overview of U.S. exports to New Zealand in these product categories:

Table 11: HS 34: Make Up Products, US Exports to New Zealand

Table 12: HS 35: Hair Care Products, US Exports to New Zealand

Table 13: HS 37: Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants, US Exports to New Zealand

Top Domestic Trade Fairs

There is no industry trade event for this sector in New Zealand.

Regulations, Standards and Customs

- There are no licensing requirements.
- Import duties for cosmetics range from zero (HTS: 3301) to 5% (HTS: 3304). If the Trans-Pacific Partnership Trade Agreement is ratified by the U.S. and New Zealand, these tariffs will be eliminated immediately.
- New Zealand has a Goods and Services Tax of 15%.
- New Zealand's Cosmetic Standard is aligned to ISO Standards 22716 on Good Manufacturing Practices: http://www.epa.govt.nz/hazardous-substances/importing-manufacturing/pages/cosmetic-products.aspx
- New Zealand Customs restricts the import of aerosol sprays that contain ozone-depleting substances.
- Some product ingredients are culturally sensitive e.g. placenta to New Zealand's indigenous population and Pacific Island people.

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Personal Care & Cosmetics Products Country Guide: Philippines

Executive Summary

The Philippine market presents excellent opportunities for U.S. cosmetics and personal care products, particularly make-up, skincare products, and fragrance. Total imports in the Philippines of cosmetics and personal care products were valued at $1.281 billion in 2015. According to industry sources, domestic production dominated the cosmetics industry with approximately 75 percent of the market.

Cosmetics and personal care products from Thailand dominate the import market, although Made in America products still maintain a reputation for high quality and name brand recognition among Filipino consumers. Imports from the U.S. slightly dropped from $61 million in 2014 to $57 million in 2015, which may be due to the growing number of local suppliers. For most Filipino consumers, however, a "Made in America" label is still a significant competitive advantage. It speaks of a higher quality and better value. U.S. made products compete on quality/technology and innovation

Among the top American imports in the sector are lipstick, oil-free make-up foundations, perfumes, skin cleansers, facial cleansers, soaps, shampoos and conditioners. Price is a strong determining factor in most Philippine cosmetic purchases. American firms such as Avon, Colgate-Palmolive, Johnson & Johnson and Procter & Gamble have manufacturing facilities in the Philippines with product readily available in most retail outlets. The growth in their local product has impacted the demand for mass market U.S. branded products; however, this is gradually being replaced with premium brands such as Estee Lauder and MAC.

Overview of the Domestic Market

The Philippines' importation of cosmetics and personal care products declined by $9 million -- from $1.290 billion in 2014 to $1.281 billion in 2015, as local production continues to increase. According to industry insiders, imports supplied an estimated 25 percent of total market.

In past years, Thailand and Indonesia were the top cosmetics and personal care products suppliers to the Philippines, selling U.S. branded products. However, their market shares have been on the decline in recent years as foreign manufacturers as well as domestic industry have ramped up local production. In 2014, Thailand held 18 percent of market share, while Indonesia had 9 percent. Thailand's market share declined by 2 percent to 16 percent in 2015, while no 2015 data is available for Indonesia.

These U.S.-branded, but foreign-produced products have taken over U.S. market shares of imported goods from the U.S.

Demand for raw materials and finished products for skin whitening and anti-ageing (glutathione, metathione, tretinoin, etc.) continues to grow. Local manufacturers of cosmetics, toiletries and personal care products use whitening ingredients to address local and export demands. Most companies include a whitening component in their entire product line -- from soaps and moisturizers to toners and UV-protection products and creams. Philippine-made cosmetics, toiletries, and personal care products are exported to other countries, primarily to the Middle East.

Some local products with whitening properties also contain natural and organic ingredients from locally available sources such as green and ripe papaya and *kalamansi*, a local lime. Other skincare preparations may contain locally sourced avocado, aloe vera, virgin coconut oil, seaweeds, and alum. The demand for cosmetics, toiletries, and personal care products continue to grow as consumers become more aware of the importance of health and hygiene. There are now also more products formulated for young skin aimed at young consumers.

Major domestic manufacturers are Procter & Gamble Philippines; Colgate Palmolive Philippines; J&J Philippines; Amway Philippines; Unilever Philippines; Splash Corporation/Hortaleza Beauty Center (HBC); Ever Bilena; Lamoiyan Corporation; and Rainiers Research Development Institute, Inc. Imported products include brands such as Max Factor; Avon; Fullerton/Sara Lee; Mary Kay Cosmetics; Maybelline; L'Oréal; MAC; and Shiseido.

Consumer Profile

Traditionally prudent Filipino consumers have increased their spending in line with the country's solid economic performance. With more money in their pockets, consumers are buying higher-quality essentials such as food and household products, as well as make-up, skin care, soap, and other hand-wash products. The growing middle class also has increased access to available consumer credit and financial cards.

Distribution Channels and Marketing

According to different studies, Filipinos are some of the heaviest internet users with an average of six hours per day spent online. The internet provides consumers abundant information about current global trends, new products in the market, and top cosmetics brands. Cosmetics companies benefit from the ease in promotions that social media offers, and are able to enhance knowledge and interests among consumers.

Imported products are distributed mainly in department stores, supermarkets, hypermarkets, drugstore chains, duty free outlets, and through direct sales channels – a reflection of aggressive marketing of these products on various platforms, including social media.

The best way for a U.S. company to sell to the Philippines and ensure broad exposure of its products is by working through a distributor who distributes its products nationwide through dealer or agent connections. It is advantageous to a brand for foreign principals/exporters to provide promotional materials, advertising, and training for sales and service staff of their distributor.

Market leaders such as multinational companies Procter & Gamble, Johnson & Johnson, Colgate-Palmolive, Unilever, and large local companies like Splash, Unilab, and Myra, tend to advertise heavily in print, TV, radio, and social media. They usually allot a significant portion of their budget for mass-market campaigns and this tends to help them retain top spots in the industry.

In addition to personal care products top-sellers in cosmetics market are distributed through multi-level marketing or direct selling – Avon, Mary Kay, Fullerton/Sara Lee, Amway. Most of these products are U.S. brands.

Product Trends
U.S. brand Avon Cosmetics dominated color cosmetics in 2015, with a market share of 29 percent. The company remains appealing to mass consumers due to its affordable prices, product variety, and flexible paying terms. Avon is also a very well-established brand that has penetrated even small neighborhoods.

Pricing

Imported goods for sale in the Philippines are not only considered quality products, but are also more expensive. If the difference between a locally manufactured product and an imported one is a few pesos, a consumer would likely buy the imported brand.

Filipino consumers are increasingly more discerning and brand-conscious and this is more and more reflective in their purchase habits. They watch out for product promotions that offer their favorite products at lower prices and think twice before making purchases.

To make products more available to consumers, cosmetics and personal care companies, including multinationals, have repackaged products into single-use sachets. Consumers have the option to buy in quantities they need and can afford; for example, they can buy one sachet only or enough sachets for a week or two.

The average mark-up for consumer goods is 40 percent.

Representative retail prices for the following products (US$)

Products	Mass Market		Premium	
	Low	High	Low	High
Perfume	$6.16	$10.29	$20.59	$113.37
Lipstick	$3.40	$4.43	$8.20	$15.46
Eye Shadow	$7.19	$11.48	$20.61	$69.88
Mascara	$4.11	$7.73	$24.73	$76.26
Sunscreen	$5.13	$8.22	$10.31	$38.54
Bronzer/Blush	$6.00	$9.03	$12.16	$25.97
Skin Cream	$4.10	$9.28	$15.05	$57.71
Shampoo/Conditioner	$3.09	$5.67	$16.28	$51.53
Hair Styling Product	$3.09	$5.77	$14.39	$28.75
Deodorant	$2.04	$3.40	$8.14	$20.61
Nail Polish	$0.93	$1.86	$7.94	$11.32
Shaving Prep	$2.39	$6.39	$11.27	$26.69

Source: U.S. Commercial Service Philippines Field Research

Overview of the Domestic Market

US Imports and Competitors
Cosmetic products in the market may either be locally produced or imported. The majority of imported cosmetics come from Thailand, Malaysia, Korea, Japan, Indonesia, the U.S., Singapore, China, Germany, U.K., France, and Italy. Although China is one of the top manufacturers of less expensive cosmetic products, Philippine consumers tend to favor U.S. made products in part due to reports on toxic substances in Chinese cosmetics. European brands bearing labels of famous designers are considered high-end and therefore, the sales volumes are not as extensive.

Philippine Importation of Cosmetics and Personal Care Products and Market Share (In US$, Millions)

COUNTRY	2013 Value	% Market Share	2014 Value	% Market Share	2015 Value	% Market Share
U.S.A	$53	5%	61	5%	57	4%
France	$8	1%	9	1%	10	1%
Japan	$24	2%	18	1%	20	2%
EU 28	$46	4%	53	4%	50	4%
China	$225	22%	272	21%	299	23%
South Korea	$21	2%	27	2%	22	2%
Thailand	$191	19%	238	18%	207	16%
Indonesia	$105	10%	115	9%	NA	NA
Other Suppliers	$355	35%	497	39%	616	48%
TOTAL	$1,029	100%	1.290	100%	1.281	100%

Source: Trade Policy Information System (TPIS)

The U.S. faces stiff competition from France, Japan, Europe, China, South Korea, Thailand, Indonesia, and other foreign suppliers - as well as from a growing local industry, which industry players peg at about 75 percent of the total market. China leads foreign suppliers with 23 percent market share, followed by Thailand with 16 percent market share, and other foreign suppliers with a total market share of 48 percent.

Top exports of the U.S. to the Philippines in this sector include make-up and skin care preparations (HTS Code 3304) valued at $16 million and soap and other skin cleansing products (HTS Code 3307) valued at $13 million. Widespread brand-building activities and inexpensive pricing of U.S. mass-market hair product suppliers like Procter & Gamble, Johnson & Johnson, and Colgate-Palmolive contribute to the success of the U.S. as the market leader in these sectors.

Best Sales Prospects

The Philippines is a consumer driven economy that relies heavily on how much people are buying and spending. The country has reported steady positive economic growth over the past several years and has an increasing middle class that likes foreign consumer goods. In the large personal care sector, skincare products rank at the top in terms of demand. Best prospects in this area include: skincare products (hand and body lotion, facial care, liquid and soap, hair care products (shampoo, conditioners, and hair treatment), and oral care (toothpaste, toothbrush, and mouthwash).

Whitening creams, anti-wrinkle products, make-up preparation for the skin (such as powder, liquid foundation, and blush on), and preparations for skin care (cleansers, toners, and moisturizers) are also among best sales prospects for the Philippines. Colognes, body sprays, and perfumes are especially popular among the younger generation. Consumers also spend on other categories such as wipes and deodorants. Consumer spending in the cosmetics and personal care sectors has been driven by purchases across all socio-economic classes, including lower income buyers who are now open to buying trendier and more expensive personal care products like liquid soap, wipes, and cosmetics.

See the following tables for more information on the U.S. and competing countries exports to the Philippines:

Table 1: Philippines Total Personal Care and Cosmetics Imports

Top Domestic Trade Fairs

PHILIPPINES INTERNATIONAL BEAUTY SHOW (PHILBEAUTY)
May 3-5, 2017
SMX Convention Center
Pasay City, Philippines

Regulations, Standards, Customs and Tariffs

The Annex to this report provides an overview of the requirements to sell cosmetics in the Philippines per the requirements of the ASEAN Cosmetics Directive as well as relevant national requirements.

The ASEAN Harmonized Cosmetic Regulatory Scheme enhanced cooperation among ASEAN member-states in ensuring the safety, quality, and claimed benefits of all cosmetic products marketed in ASEAN, and eliminated restrictions to trade of cosmetic products among member-states through harmonization of technical requirements, mutual recognition of Product Registration approvals, and the adoption of the ASEAN Cosmetic Directive.

For products that have been registered under the ASEAN Harmonized Cosmetic Regulatory Scheme, guidelines prescribed under this agreement must be followed. ASEAN member-states “shall mutually recognize the product registration approvals for cosmetic products, issued by a member-state’s regulatory authority, in accordance with the ASEAN Cosmetic Product Registration Requirements and ASEAN Cosmetic Labeling Requirements.”

The ASEAN Harmonized Cosmetic Regulatory Scheme is advantageous to exporters of cosmetics and personal care products to the region because their product registration within any one of the ASEAN member-states will be recognized any other ASEAN member nation. As such, it is not necessary to register products in all ASEAN countries where an exporter plans to do business.

Additional information to register a product for all of ASEAN via the Philippines, as well as information on specific requirements for the Philippines may be found at the Philippine Government’s Food and

Drug Administration website: http://www.fda.gov.ph/attachments/article/155147/AO%20150%20-%20Regulation%20(Registration%20of%20Cosmetic%20Specialties).pdf

Restrictions and other allowable product substance and ingredients are also available on the website.

The Philippines imposes 1-10 percent tariff duty and a 12 percent value-added tax (VAT) on imported cosmetic products.

Although control is improving, corruption remains a significant challenge with regard to the product registration process in the Philippines. The registration process is slow due to a complex bureaucracy and paperwork requires many signatures before final approval. The maximum time needed to register a product with the Food and Drug Administration is from 6 to 18 months. However, there is a directive from the current administration to cut the wait time for all government documentation process to three days.

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Personal Care & Cosmetics Products

Country Guide: Singapore

Executive Summary

The Singapore market value for beauty and personal care recorded positive current value growth in 2015, though this was noticeably slower than in 2014. According to industry sources and available published market research, this can be attributed to a more challenging economic environment and growing competition from travel retail. The forecast for the cosmetics market in Singapore is also expected to grow at a CAGR (compound annual growth rate) averaging 5% from 2016 to 2020. The U.S., France and the rest of EU 28, Japan and China continue to be the top five leading suppliers of cosmetics, toiletries and fragrances to Singapore. The U.S. continues to enjoy a good reputation and is recognized by the consumer as one of the leaders in the industry. Its share of the overall market has stayed constant over the last few years.

The beauty business is fairly resilient to economic cycles and continues to thrive in Singapore. Industry sources say that approximately five new brands enter the market each year, but this does not necessarily translate to a significant growth in the consumer base. To stay relevant, top brands invest heavily in advertising, promotions and marketing as well as research & development. The product life cycles tend to be short and new brands and differentiated products are regularly being introduced to the market to satisfy the needs and wants of the discerning consumer.

The domestic retail market is sophisticated with various market segments, including both consumers with high disposable incomes seeking premium and high-quality products, as well as price-sensitive, mass-market buyers. Besides serving as home to an affluent, local resident population, Singapore also plays host to a significant number of expatriates who not only enjoy and demand a high-quality lifestyle, but also possess great knowledge of international products. In addition, tourists visiting from the region contribute greatly to total retail sales.

U.S. companies seeking to expand into Southeast Asia should consider using Singapore as a showcase market and a launching pad for their products and services. According to industry sources, more than 85% of all imports of cosmetics, toiletries and fragrances are re-exported, and as such, the country serves as an ideal gateway to the region.

Overview of the Domestic Market

Size and Growth Trends in the Domestic Industry

There are more than 70 business listings of companies that both import and manufacture cosmetics and toiletries in Singapore, ranging from mass-market products to premium, luxury brands. As Singapore is a high-cost manufacturing site, most firms have products manufactured in lower-cost countries in the region. This allows them to take advantage of the island state's strategic location in Southeast Asia and its close proximity to lower-cost production countries.

Figure 2: Overview of Singapore's Cosmetics

The market is stratified according to the following tiers. The high-end retail departmental stores feature international brand names such as Estee Lauder, Lancome, MAC, Christian Dior, YSL, Shiseido, Laneige, Sulwhasoo, Dr. Jart, just to name a few. There is also a niche segment that features new and trending products that straddle both the pharmaceutical and cosmetics sector and these are known as the "cosmeceutical" brands. Brands that dominate in this niche are Perricone MD, Murad, Inc., Obagi Medical Products, Allergan, Inc. and SkinMedica, Inc.

Trade Flows (Thousands)

	2015
Imports	$3,001,431
Imports from U.S.	$ 340,554
% of Imports Sold in Singapore	~15%
% of Imports Exported	~85%

The mass market brands, typically the top brands such as Olay, Hada Labo, Bio-essence, L'Oreal, Neutrogena, Nivea, Biore, make up the mass market retail sector. As the largest sub-sector, it consists of these major mass-market chain stores – Watsons (104 stores), Guardian (124 stores), Sephora (11 stores) and Sasa (23 stores). They are found in almost every major shopping district, mall and subway station. Together they command more than 85% of the market. Supplementing these are smaller chain stores such as Beauty Language and Venus with 25 stores and 17 stores respectively. These and other small discount stores have their own faithful shoppers who are price sensitive. The MLM (multi-level marketing) segment also has its share of the consumers and is estimated to constitute less than 3% of the market.

E-commerce is identified as a fast-growing market segment with most traditional retailers ensuring that they have an on-line presence. According to local distributors, the challenge is the new borderless world and with Singapore ranked as the most wired nation in the world with a strong logistics sector, more consumers are buying their skincare and cosmetics from international e-commerce sites which offer better pricing. U.S. firms that wish to appoint distributors must address the issue of cross-border purchases and parallel imports, which adversely affects the locally-appointed distributor who has invested in awareness generation and brand building. With the growth of e-commerce is the proliferation of online forums and blogs which more companies are tapping to raise brand and product awareness. Consumers value their opinions and increasingly, astute distributors leverage these key opinion leaders to promote their brands.

The doctor/dermatologists, medi-spa, beauty salon and spa sector is also a significant broad market segment. It competes directly with the retail trade in so much as consumers who seek services with these practices also buy retail products for use at home. While the leading brands continue to enjoy a strong market share, the trend is for more of these practices to have skincare and other treatment products branded under their own label. This has led to an increased interest in private label and OEM manufacturers of beauty products. The doctor practices, particularly, prefer this option as it enables them to build their reputation and branding. As Singapore is a gateway to the Southeast Asian region, some of these practices enter these new markets with not only their practices but a full range of products to offer.

Consumer Profile

The image-conscious and affluent woman, who places a high priority on personal grooming and appearance, continues to drive demand for cosmetics, toiletries and fragrances in Singapore across all product categories. Hydration, protection and convenience are key themes and more consumers are seeking products that offer these in their skincare and cosmetics.

Leading international brands continue to dominate the market though there is an appetite for niche product lines, such as cosmeceutical brands that combine revolutionary ingredients with ease of use. The lines continue to blur between skincare and cosmetics with more cosmetics incorporating functional ingredients and healing properties. To this end, more lip balms incorporate color and skincare have tints, as examples. The young and trendy are also experimenting with more unique color products (both make-up and hair) to differentiate themselves from their peers.

Time constraints with hectic and busy lifestyles have contributed to an increase in multi-functional product sales. The consumer has embraced skincare and cosmetics formulations that possess sunscreen, anti-aging and brightening properties. These have experienced dynamic growth over the last few years and can be attributed to the changing demographics of the population as well as greater awareness of the harmful effects of the sun's UV and UVB rays. Increasingly, sun care products are being bundled with regular skin care regimes and sunscreen ingredients are being added to facial cream formulations for ease of use.

Today's men are also less afraid to be seen as not "macho" and increasingly, more are interested in men's grooming and personal care products. They recognize that looking good is as much about feeling good and this translates to boosted confidence. This is indeed another growth sector that is underpinned by an increasing number of "metrosexuals" – affluent men who are conscious of how they look – as well as the "Spornosexual"- a new breed of metrosexual men who engage in sports and healthy lifestyles. Another newly-coined term to describe the new-age male is "Heteropolitan".

More consumers are also seeking products that contain what they feel are more natural and organic ingredients. Just as they are eating more healthily, they also would like to use skincare, make-up and hair care products that have less chemicals and are more environmentally-friendly. Recognizing this, more retailers are marketing products under the "beauty from within", "holistic and wellness" label, cross-selling cosmetics, hair care, skincare and nutritional supplements. Increasingly, skincare brands are complementing topical products with nutraceuticals and the trend is to improve skincare not only by applying good products on the skin but also through oral nutritional supplements. Some European and Asian brands have registered an increase in sales from such a strategy.

***Distribution Channels and Marketing** - Cosmetics & Toiletries*

Figure 1: Market Segmentation & Breakdown of Retail Trade in Singapore

Personal Care Stores
- Watson's
- Unity
- Guardian
- Independent pharmacies
- Mustafa

Department Stores
- Marks & Spencer
- Isetan
- John Little's
- Metro
- OG
- Robinson's
- Tang's
- Takashimaya
- BHG

General Trade
- 7-Eleven
- Cheers

Beauty Concept Stores
- Sephora
- Sasa
- Beauty Language
- Skin Inc.
- Venus

Supermarkets
- NTUC Fairprice
- Giant
- Cold Storage/Jason's/Market Place
- Sheng Siong
- Mustafa

General Trade
- Wholesalers
- Medical Halls
- Minimarts (Mom & Pop shops)

E-Commerce

Product Trends

The key trend that will drive the sales growth of cosmetics and toiletries is the "premiumization" of products as a result of customers enjoying increased disposable income levels and the rising affluence of the general population. Sophisticated and the more discerning consumer are constantly exposed to social media and other beauty news platforms, both print and online and as a result, they are more eager to test new and different personal care products.

Singapore is an affluent market and is considered a showcase market for the rest of Southeast Asia. Often-times, fashion trends are developed and adopted in Singapore before introduction to neighboring markets. U.S. products enjoy a good reputation in Singapore and U.S. exporters should use Singapore as the launching pad into the region.

Sales of color cosmetics and skincare (including facial masks) have remained constant over these past two years. Facial make-up continues to be the most dynamic performing of all color cosmetics products. An increasing number of image-conscious, career women and the growing number of girls using make-up at a younger age contributed to the sustained performance of this subsector. Over the years, more consumers have been paying attention to skincare and trending are Korean-beauty products such as the BB and CC creams which color corrects as well as reduce the appearance of redness. Trending is the "dewy, fresh, light-weight, no make-up look" and there is increased popularity in what is called "cushion compact/foundation" which achieves this result with added SPF, extra hydration and anti-aging benefits. They are also easy to use and comfortable on the skin as these lightweight creams function more as a moisturizer than a foundation and yet provide the benefits of coverage. Skincare regimes including facial masks that incorporate healing and anti-aging properties and ingredients such as argan oil serum green tea extract, Vit C, Mandelic acid are popular.

Haircare sales continue to grow underpinned by an increased usage of colorants, styling agents and salon hair care products. Salon stylists continue to use aggressive sales tactics, promotion packages and loyalty programs to entice their customers to purchase from them. These stylists function as advisers and provide haircare and styling advice to their clients. The typical Singapore household has more than one brand of shampoo in order to meet the varying needs of each family member. Hair care brands that differentiate and address hair and scalp problems tend to have a more loyal following compared to the mainstream hair care brands that are more generic.

Premium women's fragrances dominate overall fragrance sales as women are more likely than men to own a variety of different perfumes. Consumer preferences tend to favor scents that are light, fresh and fruity as opposed to strong, flower scents. On the contrary, sales of mass fragrances are extremely mixed and very fragmented. Various mass market brands emerge every year, many of which are attempts at imitating popular premium fragrances. These are marketed without fanfare or promotion.

Nail spas, pedicure and manicure products have continued to enjoy sustained growth in Singapore and is popular among women of all ages. Those that specialize in nail art are still popular with women visiting them on a regular basis. This augurs well for the sub-sector.

Pricing: how local distributors determine prices (e.g. markup, other costs)

Based on interviews with local distributors, ideally, they would request for at least a 5X (5-times) mark-up. This will allow them to comfortably factor in advertising and promotional fees including e-commerce marketing and social media promotion, logistical costs associated with importing the product as well as provide some flexibility for negotiating with the large mass-market retail stores that require distributors to pay listing fees to have product on their shelves.

Representative retail prices for the following products (US$)

Products	Mass Market		Premium	
	Low	**High**	**Low**	**High**
Perfume	$14.63	$45.59	$47.79	$205.88
Lipstick	$1.40	$36.69	$32.26	$58.82
Eye Shadow	$5.81	$16.76	$25.74	$77.21
Mascara	$4.34	$21.99	$25.00	$53.68
Sunscreen	$6.99	$51.40	$25.00	$125.00
Bronzer/Blush	$3.09	$16.84	$27.94	$61.76
Skin Cream	$4.78	$102.21	$33.09	$544.12
Shampoo/Conditioner	$3.60	$36.69	$23.53	$114.71
Hair Styling Product	$3.53	$18.31	$25.00	$50.00
Deodorant	$2.21	$18.38	$16.18	$47.79
Nail Polish	$1.47	$14.63	$16.91	$28.68

Shaving Prep	$4.49	$19.78	$36.03	$808.09

Source: US Commercial Service, Singapore, Field Research

Overview of the Domestic Market

U.S. Imports and Competitors

Most of the cosmetics, toiletries and fragrances that are sold in Singapore are imported. The top 10 country suppliers of Singapore' imports are France, United States, Japan, United Kingdom, China, Italy, Germany, Indonesia, Thailand and South Korea. The U.S. is ranked 2nd of the top ten major suppliers and accounts for approximately 15% of market share. France has the largest market share of 36% and continues to be the leader in the cosmetics, toiletries and fragrances trade. Korean products, though ranked tenth, continue to enjoy strong brand recognition and its brands enjoy one of the top brand recalls.

Given the intense competition in this sector in what some industry players label as a recession-proof sector, prestige brand names are investing heavily to maintain and increase market share.

Table 9: Imported Products Share of Singapore's Personal Care and Cosmetics Market (Millions)

Importer	2011	% Market Share	2012	% Market Share	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	$243	9%	$272	10%	$314	11%	$325	11%	$341	11%
France	$594	22%	$586	22%	$678	23%	$742	24%	$669	22%
Japan	$130	5%	$146	5%	$136	5%	$137	4%	$141	5%
EU 28 (excluding France)	$278	10%	$303	11%	$348	12%	$350	11%	$356	12%
China	$233	9%	$204	8%	$262	9%	$319	10%	$366	12%
South Korea	$33.5	1%	$42	2%	$42	1%	$50	2%	$69	2%
Thailand	$83	3%	$80	3%	$83	3%	$71	2%	$69	2%
Other Countries	$1,063	40%	$1,051	39%	$1,093	37%	$1,063	35%	$1,001	33%
Total Imported	$2,658	100%	$2,685	100%	$2,956	100%	$3,056	100%	$3,011	100%

Source: Trade Policy Information System (TPIS), if marked with a *, source is Global Trade Atlas

Top Market Segments /Opportunities Specific for U.S. Companies *(Ranking based on interviews with the trade)*

1. Face and Eye Preparations (facial skincare, eye and lip care – anti-aging formula, brightening creams/lotions, facial masks)
2. Hair care preparations (shampoos, conditioners, treatments, color, accessories and hair extensions)
3. Color cosmetics, BB and CC creams, & eye liner, eye shadows
4. Acne and Problem Skin Care (humidity and stress-related)

5. DIY and home-use derma-care equipment used in association with skincare and hair care products
6. Private Label & Contract Manufacturing Options – mainly for skincare. Singapore-based distributors are interested in sourcing for good formulations but branding it under their own labels. This could be for companies that operate and market to other international and regional markets as well as for dermatologists, medi-spas, beauty-salons who want their own brand recognition. Besides these, the major mass market retailers, like Watsons, Guardian and Unity (Labor Union Cooperative) are also interested in branding products under their own house brands.
7. Slimming and body sculpting products, massage and bath products for home use, spas and salons
8. Natural & Organic personal, skincare and hair care for those with allergy and sensitive skin, hair thinning/balding and scalp issues. This is currently a niche market but a strong growth sector. According to research organization, Future Market Insights (FMI), Organics cosmetics is projected to be worth $66 billion in ASEAN by 2020. This is due to rising awareness and disposable income.
9. Nail colors, nail-care products, artificial nails, soft-gel nail preparations,
10. Eye lash extensions, implants, fake eyelashes & semi-permanent eyelash extensions, eye brow
11. Skincare products for men targeting the metrosexual or the sporno-sexual male (sports enthusiasts)

Market Entry and Opportunities

U.S. companies who are new to the market and interested in exporting to Singapore should consider appointing a local distributor to represent their products. They can also establish a presence here and open their own concept stores. Given Singapore's small market size, most prospective distributors will ask for exclusive rights to sell the product. They most likely will also request for distribution rights to the neighboring countries of Southeast Asia, such as Malaysia, Brunei and Indonesia. In turn, they will ensure that they commit their resources to promoting the product to the appropriate retailers and distribution channels and reap the benefits of their efforts should sales materialize. Most major retailers operate across borders in Southeast Asia and distributors who are given regional rights will be in a better position to negotiate better promotional programs with the major retailers that operate in several markets and leverage economies of scale.

There is no special legislation in Singapore governing agency / distributor agreements and therefore, such contracts should be based on mutually-beneficial and agreed terms and conditions between both parties.

U.S. exporters of cosmetics, toiletries and fragrances should evaluate the suitability of the distributor based on the product mix that they carry as well as the end-user customer profiles that he targets. The product range and brands that the prospective distributor carries should complement those of the U.S. firm.

American companies should also be prepared to provide advertising and promotional (A&P) support for product launches so as to better build brand awareness and induce trial purchases. Besides A&P support, distributors or brand owners also have to pay listing fees to have the products distributed in chain stores or major departmental stores. These initial costs can be high, but the returns and volume sales are often sustained due to the strong customer traffic and reach of these stores. Local distributors may request that the American firm fund half the cost of listing fees should they choose to market the products through the mass market retail channels.

If American firms are not prepared to provide A&P support, then they may wish to seek a private label buyer, in which the Singaporean firm is the brand owner responsible for tasks such as the product launch, brand promotion and ensuring sustainability.

Growth in Singapore's cosmetics and toiletries market is expected to see more competition among the top premium brands and an increase in the number of companies serving ever more specialized niche markets, such as the growing organics sector. These niche players will serve to expand the market by providing either unique or complementary products to consumers.

See the following tables for more information on the U.S. and competing countries' exports to Singapore :

Table 1: Singapore Total Personal Care and Cosmetics Imports
Table 2: Singapore Imports of Personal Care and Cosmetics Products from the U.S.
Table 3: Singapore's Imports of Personal Care and Cosmetics Products from China
Table 4: Singapore's Imports of Personal Care and Cosmetics Products from Japan
Table 5: Singapore's Imports of Personal Care and Cosmetics Products from France
Table 6: Singapore's Imports of Personal Care and Cosmetics Products from Thailand
Table 7: Singapore's Imports of Personal Care and Cosmetics Products from South Korea
Table 8: Singapore's Imports of Personal Care and Cosmetics Products from EU 28
Table 9: Imported Products Share of Singapore's Personal Care and Cosmetics Market
Table 10: HS 34: Make Up Products, US Exports to Singapore
Table 11: HS 35: Hair Care Products, US Exports to Singapore
Table 12: HS 37: Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants, US Exports to Singapore

Top Domestic Trade Fairs

BEAUTY ASIA 2017
Date: February 20-22, 2017
Location: Suntec Singapore
Website: http://www.beautyasia.com.sg/
Show Description: International trade show for cosmetics, skincare, fragrances, hair products, spa, health and fitness industry professionals.

Regulations, Standards and Customs

The Annex to this report provides an overview of the requirements to sell cosmetics in Singapore per the requirements of the ASEAN Cosmetics Directive as well as relevant national requirements.

There are no import or custom duties on cosmetics, toiletries and fragrances. A 7% goods and services tax (GST) is imposed on all goods sold and services provided locally. Imports are subject to GST, but payments are refundable for re-exports.

Introducing products into Singapore is a fairly simple process and there are not many regulatory hurdles to clear in this regard. Obtaining product approval is a relatively straightforward process as long as the products being imported comply with regulations that govern cosmetics products.

The controlling authority for the regulation and licensing of cosmetic products intended for human use is the Health Sciences Authority operating under the Ministry of Health. Firms must also comply with the Health Products (Cosmetic Products-ASEAN Cosmetics Directive) Regulations. The Cosmetics Control Unit is responsible for administering the regulations for cosmetics products and ensuring compliance with the ASEAN Cosmetic Directive. More information can be found on http://www.hsa.gov.sg, where a copy of the Guidelines on the Control of Cosmetics Products can be downloaded.

Singapore implemented the ASEAN (Association of South East Asian Nations) Cosmetic Directive or ACD on January 1, 2008. The aim of the ASEAN Harmonized Cosmetic Regulatory Scheme is to enhance cooperation to ensure safe and quality cosmetics marketed in ASEAN and eliminate restrictions to trade through the harmonization of technical requirements.

Under the ACD, cosmetics will no longer be classified under Category I and II. Previously, category I products, which included those applied around the region of the eye and lips and oral dental hygiene, required product licensing prior to the manufacture, import, sale and supply. Under the ACD, it is the companies' responsibility to notify the Health Sciences Authority, Singapore's equivalent of the FDA, and commit via self-declaration the assurance of product safety and quality.

The ACD is closely aligned with the European Cosmetic Directive and aims to be recognized internationally as a robust framework for regulating cosmetic products. It provides a common definition for cosmetics; details ingredients not permitted in cosmetics; lists approved preservatives, colorants and UV filters; details labeling requirements; and issues guidelines on cosmetic GMP and cosmetic claims. More information can be found on http://www.hsa.gov.sg/publish/hsaportal/en/health_products_regulation/cosmetic_products.html

There are no import duties on cosmetics.

For More Information:

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Fax: (65 6476 9080
Website: http://www.export.gov/singapore

Personal Care & Cosmetics Products Country Guide: South Korea

Executive Summary

South Korea is one of the world's most exciting beauty markets. New beauty trends and innovations, featuring sophisticated ingredients and aesthetically appealing packaging are constantly on display. South Korean-branded cosmetics labels (K-beauty) have earned popularity, particularly within Asia, with the rise of the country's cultural presence, otherwise known as "hallyu," and continue to attract image-conscious local consumers and foreign tourists.

Korea is the 10th largest cosmetics market in the world, representing nearly 2.9% of the global market. In 2015, the size of the Korean cosmetics market was estimated to be approximately USD 7.6 billion; the total local production and total exports increased 11.4% and 43.8% each from the previous year. The market has been growing by an average rate of 6.7% for the past five years and is expected to grow approximately 4-5% annually over the next three years.

Sales of premium end cosmetics in department stores and door-to-door channels were stagnant in 2015, while duty free and on-line shopping grew considerably. Diversifying retail channels creates opportunities for innovative brands to introduce trend-setting products.

Korean consumer buying habits are changing; focusing on purpose and functionality rather than brand awareness. According to a survey in 2014, South Korean women, who follow multi-step skincare routines involving cleansers, essences, and ampoules, use 27 cosmetics products per month on average while Korean men use almost half of the number.

Cosmetics in Korea are regulated by the Ministry of Food and Drug Safety (MFDS) and fall under two categories: functional cosmetics and regular cosmetics. Functional cosmetics, which currently comprise whitening, anti-wrinkle, and sunscreen & tanning products, are expected to be extended to 11 categories including hair dye products and hair loss prevention cosmetics. MFDS reviews only functional cosmetics for pre-market approval. For all other regular cosmetics, the Korea Pharmaceutical Traders Association (KPTA) has been authorized by MFDS to review and certify import permission requests submitted by the Korean importer.

According to industry sources, the growth of parallel imports and reduced tariff rates will contribute to increasing demand for high-quality foreign cosmetics. U.S. exporters should note that remaining Korean tariffs on imported U.S. cosmetics will be eliminated by 2022 under the KORUS FTA. These market trends signal good opportunities for U.S. companies in the years ahead.

Overview of the Domestic Market

Size and Growth Trends in the Domestic Industry (Millions, $USD)

	2012	2013	2014	2015

Total Market Size	$6,236	$6,963	$7,759	$7,981
Total Local Production	$6,326	$7,280	$8,511	$9,481
Total Exports	$1,067	$1,290	$1,799	$2,587
Total Imports	$978	$972	$1,047	$1,087
Imports from the U.S.	$270	$285	$323	$316

Exchange Rate: USD1=KW 1,126 (2012); 1,095 (2013); 1,054 (2014); 1,132 (2015)
Sources: Korea Pharmaceutical Traders Association (KPTA), Korea Cosmetic Association (KCA)
Unit: USD million
Total market size: Total local production – total exports + total imports

Korea is the 10th largest cosmetics market in the world, representing nearly 2.9% of the global market. In 2015, the size of the Korean cosmetics market was estimated to be approximately $7.98 billion USD; the total local production and total exports increased 11.4% and 43.8% each from the previous year. The market has grown by an average rate of 6.7% over the past five years.

South Korea's total local production in 2015 was estimated at $9.5 billion USD, an increase of 11.4% over the previous year. Local production growth of 13.9% a year on average (CAGR) over the past five years shows the market's ability to achieve stable and continuous growth as well as its capacity for resilience in unfavorable economic conditions. Skincare represented 57.8% of local production followed by make-up (15.9%) and haircare (13.0%). Production of bath preparations showed the highest CAGR of 33.1% while make-up cosmetics and personal deodorants and antiperspirants grew at 23.2% CAGR and 19.8% CAGR respectively.

Amore Pacific and LG Household & Health Care Ltd. are the two clear leaders in the Korean cosmetic market, offering comprehensive product portfolios that cover a wide range of price points. These two local companies dominate the sector with 41.3% market share, an increase of 19.3% and 12.3% compared to 2014.

Exports of South Korean cosmetics have continued to grow rapidly, reaching $2.58 billion USD in 2015. China is by far the largest export market for K-beauty, but Korean beauty companies have an increasing presence globally. Exports of South Korean cosmetics to China doubled in 2015 reaching a record high of $1.06 billion USD, accounting for 41% of South Korea's total cosmetics exports. Hong Kong and the U.S. were the second and third largest export markets for Korean products. Sales of cosmetics in South Korea's duty-free shops accounted for nearly half of the country's record $5.1 billion USD duty-free revenue in the first half of this year. This was bolstered by a large influx of wealthy Chinese tourists.

Total imports of cosmetics in 2015 increased from the previous year, reaching $1.08 billion USD. U.S. imports accounted for 29% of the total market share, at $316 million USD. On a country by country basis, the U.S. is the largest importer to Korea, followed by France ($307 million USD), Japan ($128 million USD), and Italy ($50 million USD).

According to Korea Customs Service statistics, skincare cosmetics continued to be the largest import category in 2015 at 51.7%, or $722 million USD. Hair care, make-up, and perfumes and scents accounted for 14.3%, 10.9%, and 10.3% of the total import market respectively.

Consumer Profile

South Korea's per capita GDP is around $27,195 USD in 2015 and its average household expenditure on cosmetics and personal care products per month was approximately $35.1 USD.
Korean consumer buying habits are changing; focusing on purpose and functionality rather than brand awareness. This change in consumer behavior directly impacts the distribution structure, resulting in the rapid popularity of brand shops, TV home shopping, and online shopping for the purchase of low and middle priced products.
A cosmetics survey, conducted online in 2014 by the National Institute of Food and Drug Safety Evaluation targeting over 1,800 Korean men and women between the ages of 15 and 59, revealed that Korean women use 27 cosmetic products per month on average. South Korean women follow multi-step skincare routines, involving cleansers, essences, and ampoules. Skincare (7.1%) represented the largest majority of these 27 cosmetics products, followed by color cosmetics make-up (4%), body care (4%), hair care (3.3%), base make-up (3%), cleansing (2.8%), nail care (1.9%) and fragrance (1.2%). Women in their 20s used the largest number of cosmetics (28.9 products) with high usage of color make-up. Women in their 30s showed a preference for body care (4.3%), while women in their 40s and 50s focused on purchasing skincare products such as lotions and serums.

South Korean men use 13.3 grooming products on average per month, including skin care (3.6%), hair care (3.2%), body care (3%), cleansing (1.2%), shaving (0.9%), and fragrance cosmetics (0.8%).

By product segment, shampoo is the most commonly used product with 99.7% of women and 98.7% men responding. Female respondents selected hand cream (94.1%), skin toner (92.5%), body cleanser (92.3%), sun cream (90.1%), and rinse/hair conditioner (90.1%) as the most used cosmetics. 14 cosmetic products including lotion (87.9%), foam cleanser (86.1%), and body lotion (84.8%) showed more than 70% usage rates while men's cosmetics with more than 70% cosmetic usage rate were limited to only 3 items – shampoo (98.7%), lotion (87.9%), and body cleanser (76.3%).

When it comes to the frequency of cosmetics use, hand cream, liquid soap, lip gloss/lip balm, skin toner, and lotion were the top five cosmetics. The frequency of female respondents' cosmetics use per month was hand cream (72.1 times), liquid soap (65.9), lip gloss/lip balm (62), skin toner (53), and lotion (51.5). 14 cosmetic items including lipstick (48.7), serum (46.8), moisturizing cream (42.2), eye cream (37.1), foam cleanser (36), lip liner (35.2), and nourishing cream (34.1) have been counted as cosmetics that have been used more than once per day.

The aging consumer demographic in Korea should also be highlighted as a key market for the beauty industry. The share of Korean urban women aged 50-65 climbed to 29.0 % in 2015 from 22.8% in 2010. The total average expenditure on cosmetics products for women aged 50-65 reached USD 59.1 – which is 46% higher than the overall average expenditure. This aging population in South Korea will be a crucial contributing factor to invest in sophisticated cosmetics.

Distribution Channels and Marketing

E-commerce channels, drug stores, and television home-shopping channels are becoming increasingly popular for consumers to purchase cosmetic products. Duty-free shops and select shops are challenging traditional retail channels like direct selling, multi-level marketing, "mom and pop" stores, department stores, and discount stores.

Since the demand for new retail channels has become bigger and consumer demands segmented, various channels such as select shops and multi shops are entering the market. For example, LG

Healthcare and Household launched its select shops 'Tomaru' and 'Nature Collection' and expanded its operations in duty free shops. Commercial Service Korea believes that select shops/multi shops will play an increasingly important role in the distribution of cosmetic products in this market.

On-line shopping malls have been making rapid inroads as a key marketing channel with the increase of smartphone and SNS users and its accessibility. South Korea stands out as the country with the highest smartphone ownership rate/broadband penetration rate and fastest average internet speed. Sales via mobile shopping have increased dramatically in recent years. Of the total online shopping, the percentage of mobile shopping jumped from 17.0% in 2013 to 45.4% in 2015. This new trend reflects the new shopping style called 'morooming', which refers to people who "window shop" offline and then purchase online.
Korean consumers are increasingly purchasing product directly from overseas markets. Overseas direct purchase represented more than USD 1,521 million in 2015 from USD 274 million in 2010. Healthcare supplements (20%), cosmetics (14%), and food (13%) are very popular among overseas online Korean buyers. In 2014, the Korean government simplified the customs procedures for almost all consumer goods (with a few exceptions, including medicines) to improve the convenience of overseas direct online shopping. Under the Korea-US FTA, the importation of goods valued at less than USD 200 (including taxes, shipping & handling) from the U.S. are eligible for the simplified customs procedures called a 'list clearance', which is a quick, one-day customs clearance procedures as long as the logistics/courier company provides the full packing list to Korean Customs, and if the item qualifies for 'personal use'.

Imported cosmetics accounted for approximately 40% market share in the Korean cosmetics market. There is a large variety of products in the market; competitive imports differentiate themselves from existing offerings through brand identity, packaging, unique formulations and ingredients.

Imported cosmetics are primarily sold through on-line sales (32.7%), specialty stores (16.0%), brand shops (9.0%), hypermarkets (7.3%), department stores (6.6%), duty free shops (1.7%), multi-level marketing (1.6%), home shopping channels (1.3%), and other (23.7%).

There are currently three major franchise drug stores competing in the local market: CJ Olive Young, GS Watsons, and Lotte LOHBs. Shinsegae is planning to launch Boots in the first half of 2017. These retailers target customers focusing on wellness products by offering organic/natural cosmetics, nutritional supplements, and general consumer goods.

The mobile advertising paradigm is gaining popularity in the Korean market as a platform to customize advertisements for each consumer. Cosmetics companies try to maximize the impact of advertising by hiring celebrities and powerful beauty bloggers as brand models and focus advertising campaigns through major portal sites such as Nate, Daum, and Naver and SNS (YouTube, Facebook, Pandora TV, etc.). In addition, celebrity product placement (PPL) is considered one of the strongest marketing tools.

Product Trends

Korean beauty experts predict that skin care will remain the largest cosmetic category over the next few years, adding that multi-purpose products are becoming increasingly popular with consumers who are time constrained. Also there are many consumers who prefer multi-function products that are moisturizing, wrinkle preventing, and whitening.

Korean facial mask sheets are a K-beauty hit item that swept social media due to its excellent moisturizing features and usability, making it simple to include in a daily routine.

Another popular item is the cushion foundation, first launched by local cosmetics company Amore Pacific in 2008, which is now drawing global attention and revolutionizing the makeup routine for women around the world. Cushion, which is a combination of sunscreen, make-up base, and foundation in the form of a sponge, became a must-have item and is used by more than 75% of Korean women. Demand continues to rise. Korean cushion foundation inspired follow-up compacts from global brands like Lancôme, Chanel, and Clinique.

Strong potential subsectors for U.S. exporters to Korea include cosmeceuticals, derma-cosmetics, and natural/organic cosmetics. Industry insiders expect that the market for cosmetics products that feature dermatological benefits is growing gradually with the concept of preventative care. In addition, ceramide cosmetics and anti-pollution cosmetics are expected to develop a "long-tail" theory in the cosmetics masstige channels. When it comes to natural/organic cosmetics, Korean consumers tend to check not only natural/organic ingredients but also 'fair trade' and 'country of origin' from product labels.

Pricing

Distribution channels such as department stores, e-commerce, and home shopping channels do not directly purchase/import goods in general. Instead, they rent out space to various brands and charge 30-35% commission fees on sales. The retail price in South Korea reflects margins of retailers and distributors. In general, the retail prices in South Korea for U.S. cosmetics are 15% higher than the U.S for the same products. If prices are calculated based on a Purchasing Power Parity (PPP) exchange rate, the gap would widen by approximately 37%. The high retail price also projects a high quality image.

Representative retail prices for the following products (US$)

Products	Mass Market		Premium	
	Low	High	Low	High
Perfume	$4.3	$28.3	$40	$423
Lipstick	$3.4	$13.7	$24	$51
Eye Shadow	$3.0	$26.5	$23	$102
Mascara	$3.5	$15.7	$19	$60
Sunscreen	$4.3	$15.3	$27	$238
Bronzer/Blush	$7.5	$26.3	$27	$115
Skin Cream	$2.9	$58.4	$42	$1415
Shampoo/Conditioner	$7.0	$11.3	$23	$181
Hair Styling Product	$4.5	$7.5	$20	$160
Deodorant	$2.3	$3.5	$24	$46
Nail Polish	$0.4	$6.5	$19	$30
Shaving Prep	$0.7	$10.2	$22	$75

Source: U.S. Commercial Service Korea Field Research

Overview of the Domestic Market

US Imports and Competitors

In 2015, U.S. imports accounted for 29% of Korea's total market, at $316 million USD. On a country by country basis, the U.S. is the largest importer to Korea, followed by France ($307 million USD), Japan ($128 million USD), Italy ($50 million USD), and U.K. ($45 million USD). The U.S. maintained its position as the largest exporter in the categories of skincare, haircare, nail care, and children's products as the table shown below.

Lead Importer by Product and Import Market Share (Thousands, USD)

Import Ranking		Skincare	Perfumes	Shampoo	Make-up	Children Products	Nail Enamel
1	Lead Country	**U.S.**	France	**U.S.**	France	**U.S.**	**U.S.**
	Share of Imports	36%	52%	38%	31%	38%	75%
	Total Imported	210,979	71,609	25,284	18,246	8,074	4,523
2	Lead Country	France	Italy	Thailand	**U.S.**	Germany	France
	Share of Imports	22%	21%	26%	27%	20%	12%
	Total Imported	126,427	29,509	17,405	16,041	4,310	730
3	Lead Country	Japan	**U.S.**	Japan	Japan	Malaysia	Germany
	Share of Imports	14%	18%	7%	17%	16%	4%
	Total Imported	79,439	25,022	4,512	10,200	3,432	239

Source: Korea Customs Service

U.S. brands generally have a good reputation for their technologically advanced product formulations and product safety. A cosmetic survey conducted by local cosmetic newspaper CMN and research institute Kantar World Panel in 2015 revealed that American cosmetics brands such as MAC, Bobby Brown, Estee Lauder, Maybelline, Neutrogena, Aveeno, and Cetaphil were ranked as the top brands in 2015. The products from the brands include foundation, eyeshadow, lipstick, mascara, and body care.

Top Domestic Trade Fairs

Seoul Cosmetics & Beauty Expo 2017
http://www.cosmobeautyseoul.com/fairDash.do?hl=ENG
April 27-29, 2017
No. of Exhibitors: 781 booths from 13 countries (2016)
No. of Registrants: 55,737 (2016)
Product Mix at the trade show: cosmetics, ingredients, packing, hair/scalp, aesthetic/spa, nail, foot care, tattoo, and fragrance.

Regulations, Standards, Customs and Tariffs

The Annex to this report provides an overview of the requirements to sell cosmetics in South Korea.

In South Korea, cosmetics are regulated by the Ministry of Food and Drug Safety (MFDS). Cosmetics fall under two categories: functional cosmetics and regular cosmetics. Functional cosmetics, which currently comprise whitening, anti-wrinkle, and sunscreen & tanning products, are expected to be extended to 11 categories by the MFDA including hair colorants, hair nutrients, and cosmetics that help protect damaged skin. MFDS reviews only functional cosmetics for pre-market approval. For all other regular cosmetics, the Korea Pharmaceutical Traders Association (KPTA) has been authorized by MFDS to review and certify import permission requests submitted by the Korean importer. As of 2015, 1024 firms were registered as cosmetics importers. Among them, 715 (20.5%) were agents/distributors, 134

(3.8%), branch offices and others. A qualified Korean representative is critical to successfully penetrating the market for two reasons. First, Korean distributors know their customers and competitors well, and can monitor market changes. Secondly, the importer/distributor of the foreign supplier must submit required documents to MFDS or KPTA to obtain pre-market licenses.

Import Procedures:

All foreign suppliers must provide their importers with the required documentation. These include the Certificate of Manufacture, Certificate of Free Sale, and BSE relevant documents. Overall, once the documents required by the MFDS are ready, a foreign supplier should send them to its importer in Korea. Upon receipt of these documents, the importer will then submit them to KPTA. KPTA, in turn, will review the documents and issue import permission for the approved product through EDI (electronic data interchange). The import permission will then be sent to the Korean Customs Service, indicating that the product has been cleared to be imported into Korea. Once the product has been cleared by Korean Customs, the importer is required to conduct a pre-market quality control test to ensure that the product complies with Korean safety regulations. This test is done within MFDS's authorized laboratories. While the samples are being tested, the importer works on putting Korean labels on each product. Once the quality control test is done and cleared, the importer is able to distribute the products inside the market.

Regular cosmetics: The EDI review by KPTA takes about 3-4 working days. Industry sources mentioned that it would take a month to get *appropriate* documents (Certificate of Manufacture/certificate of free sale/ BSE related documents) from US manufacturers. EDI fee is KW5,000 (approx. $5) for three items and KW800 (approx. $0.8) for each additional item.

Functional cosmetics: MFDS should examine functional cosmetics and it will take 60 working days (3 months). It will take about a month for importers to get appropriate documents from US manufacturers. The examination fee is KW189,000/item (approx. $189).

Under the implementation of U.S.–Korea Free Trade Agreement (KORUS FTA) in March 2012, tariffs on imported cosmetics have been reduced. Remaining Korean tariffs on imported US cosmetics will be eliminated over a ten-year period.

For More Information:

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Annex

Annex

I. **Market Readiness Checklist**

II. **Country Data**

COSMETICS MARKET READINESS ASSESSMENT

	ASEAN	China	Japan	EU	South Korea
Local Registration				No	
Legal Representative	Yes By Country	Yes	Yes	Yes	Yes
Product Registration or Notification	Both	Register	Notification	Both	Both
Frequency	Yes	Yes	Yes	Once	Once
By Product or Product Group	Product Group	Yes	Yes	Product	By Product
Product Specification Requirements					
Safety Assessment	Yes	Yes	No	Yes	Yes
Raw Material Registration	No	Yes	No		Yes
Formula: Quantative, Qualitative or Both	Yes	Yes	No	Both	Yes
Material Safety Data Sheet: Raw Materials	No	Yes	No	Yes	
Material Safety Data Sheet: Product	No	Yes	No	Yes	
Preservative Efficacy	Yes	Yes	No		Yes
Nationally Certified Testing Facility	NA	Yes	No	Yes	Yes
Animal Testing	No	Yes	No	No	No
Packaging Assessment	No	Yes	No	Yes	Yes
Product Stability	Yes	Yes	No	Yes	Yes
Good Manufacturing Practice	Yes	Yes	No	Yes	Yes
Proof of Claims	Yes	No	No	Yes	Yes
Trademark Registration	No	No	No	No	No
Product Sample		Yes	No		
Labeling					
Country of Origin	Yes	Yes	Yes	Yes	Yes
Nominal Content: Weight or Volume (?)	Yes	Yes	Yes	Yes	Yes
Registration Number	No	Yes	No	Yes	Yes
Language Requirement	Yes	Yes	Yes	Yes	Yes
Product Function	Yes	Yes	Yes	No	Yes
Formula: Quantative, Qualitative or Both	Yes	Yes	Yes	Yes	Yes
Fragrances	No	No	Yes	Yes	No
Percentage of Ingredients Claimed	No	No	Yes	No	No
Alcohol Content	No	No	No	No	No
Information on Product Use	Yes	Yes	No	Yes	Yes
Warning Statements	Yes	Yes	Yes	Yes	Yes
Manufacturer Name and Address	No	Optional	Yes	No	Yes
Importer Name and Address	Yes	Yes	No	Yes	Yes
Date of Durabilty	Yes	Yes	Yes	Yes	Yes
Storage Conditions	No	Yes	No	Yes	Yes
Expiration Date	Yes	No	No	Yes	Yes
Claims	Yes	Yes	Yes	Yes	Yes
Environmental Labeling	No	No	Yes	No	Yes
Certificate of Free Sale			Yes		
By Product	Yes	Yes		No	Yes
Post Market Monitoring	Yes	Yes	No		
Consumer Hot Line	No	No		Yes	Yes
Notification of Local Authorities	Yes	Yes	Yes	Yes	Yes
Recall	No	Yes	Yes	Yes	Yes
Government Fee to Notify/Register	See Annex	Yes $1,000 for ordinary	No	No	$5 for first three and $0.80 for additional
Time to Process	See Annex	4-8 months	1 Day	1 Day	3-4 Business Days

Requirements here are for ordinary cosmetics.

ASEAN Includes: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam

The EU is included for ease of comparison, given the overlapping requirements of the Cosmetics Regulation with many Asian countries.

COSMETICS MARKET READINESS ASSESSMENT
EUROPEAN COMMUNITY

Cosmetics Definition

Any substance or mixture intended to be placed in contact with the external parts of the human body (epidermis, hair system, nails, lips and external genital organs) or with the teeth and the mucous membranes of the oral cavity with a view exclusively or mainly to cleaning them, perfuming them, changing their appearance, protecting them, keeping them in good condition or correcting body odors. Includes sunscreens and anti-perspirants.

	Requirements	Notes
Local Registration	No	
Legal Representative	Yes	See notes on identifying a Responsible Agent below.
Product Registration or Notification	Both	
Frequency	Once	Once manufacturers register their products, via the EU Cosmetic Product Notification Portal (CPNP), only required to update if there is a change.
By Product or Product Group	Product	By Product Group
Product Specification Requirements		
Safety Assessment	Yes	In the EU, this is labeled as the “Cosmetic Product Safety Report,” which is filed as part of the Product Information File or (PIF). For normal and foreseeable use. EU regulations list risk endpoints required and array of tests that can be used to assess the safety in terms of hazard and exposure of both the final product and the substances in the formula. roducts intended for children under 3 years, to be used in the eye area and on mucous membranes, have different specifications.
Raw Material Registration		All raw materials should be registered per REACH.
Formula: Quantative, Qualitative or Both	Both	All substances supplied as raw materials (including directly added preservatives, antioxidants, chelators, buffering agents, solvents, other additives, etc.) should be identified and quantified in ascending order down to 0.01%. For fragrances: composition name and code number, identity of the supplier List substances classified as carcinogenic, mutagenic or toxic for reproduction, of category 1A , 1B or 2 under part 3 to Regulation (EC) No 1272/2008 Annexes II, III, IV, V and VI of the EU Cosmetics Regulation identify substances that are either banned from products destined for sale within in the EU, subject to restrictions or, in the case of colorants, preservatives and UV filters, are expressly permitted. For restricted materials, a special dossier, notified to Commission is required six months prior to placing a product on market.
Safety Data Sheet: Raw Materials	Yes	Note the EC PIF does not require these, but the information can be used to answer some sections.
Safety Data Sheet: Product	Yes	Note the EC PIF does not require these, but the information can be used to answer some sections.
Preservative Efficacy	Yes	
Nationally Certified Testing Facility	Yes	The EU adheres to the OECD Test Guidelines allowing for the use of lab results from foreign labs certified in Good Laboratory Practice.
Animal Testing	No	EC cosmetic legislation prohibits marketing of finished products containing ingredients or combinations of ingredients that have been subject to animal testing after 2013.
Packaging Assessment	Yes	Details on the criteria and methods used to assure that the type of containers and packaging do not impact product stability, including potential leaching of packaging substances into the product.
Product Stability	Yes	Includes storage conditions, date of durability and expiration date.
Good Manufacturing Practice	Yes	GMP self-certification accepted, should follow ISO or European Committee for Standardization (CEN) standards. Responsible agent and importer should keep on file, in case requested.
Proof of Claims	Yes	When justified by a claimed effect, supporting technical information required.
Trademark Registration	No	
Product Sample		
Labeling		
Country of Origin	Yes	
Nominal Content: Weight or Volume (?)	Yes	Both weight or volume allowed. Metric, with dual labeling allowed
Registration Number	Yes	
Language Requirement	Yes	By country

Product Function	No	Not required if implicit from packaging.
Formula: Quantative, Qualitative or Both	Yes	A complete list preceded by the word ingredients. Member states may require info labeled in national or official languages, with the exception of INCI. Note there are some differences between U.S. and EU INCI. [Nano] ingredients labeled in brackets as shown.
Fragrances	Yes	Fragrances can be labeled as such or aroma. Except in the case of potential sensitizers. Annex II to Regulation (EC) No 1223/2009, lists the 26+ specific substances that must be on label, when final product concentrations exceed 0.001 % in leave-on products or 0.01 % in rinse-off products.
Percentage of Ingredients Claimed	No	
Alcohol Content	No	
Information on Product Use	Yes	If warnings, ingredients and product use information do not fit on packaging, include a leaflet, tape or card, with reference or pictorial that the info is included on the product container.
Warning Statements	Yes	Ingredients and use information have requirements on allergens and other substances used, including communications pre and post consumer
Manufacturer Name and Address	No	
Importer Name and Address	Yes	Responsible Person name and address
Date of Durabilty	Yes	Pictorial symbol, which includes month and year (day optional) to show product functionality once opened
Storage Conditions	Yes	Include temperature
Expiration Date	Yes	Include, if less than 3 years.
Claims	Yes	Provides common criteria to guide requirements. Explicit and implicit claims supported by adequate and verifiable evidence. Cannot create confusion of denigrate competitors.
Environmental Labeling	No	
Certificate of Free Sale		
By Product	No	
Post Market Monitoring		
Consumer Hot Line	Yes	Must supply consumers information on the composition and any undesirable effects of a product, including companies' contact details.
Notification of Local Authorities	Yes	The Responsible Agent is obligated to notify national authorities of Serious Undesirable Effects (SUE).
Recall	Yes	Must update the PIF based upon information generated once product is on the market
Government Fee to Notify/Register	None	
Time to Process	1 Day	

Local Business Partner Requirements

Responsible Agent**:** a legal or natural person based within the Community who is legally responsible for the placing on the EU market of a cosmetic product and who has been designated as such. The responsible person shall ensure compliance with the relevant obligations set out in the Regulation.

The Responsible Agent can be one of the following:
- Manufacturer within the EU
- Person designated by a manufacturer from outside the EU
- Distributor if he modifies a product already on the market in such a way that compliance with the Regulation may be affected or if he places a cosmetic product on the Community market under his name or trademark
- Importer(s)
- Third party with a written mandate from manufacturer or importer.

Additional Resources

1. A more in-depth overview of the EU requirements and process is available at http://2016.export.gov/europeanunion/cosmetics/index.asp
2. U.S. exporters should check the extent to which their products are affected by other EU legislation including the Directive on Packaging Waste, the Regulation on Classifying, Labeling and Packaging (CLP), and the Regulation on the registration, evaluation and authorization of chemicals (REACH). Cosmetics products imported into the EU in quanities exceeding 1 metric ton per year will likely have to be registered under REACH. For more information see http://2016.export.gov/europeanunion/reachclp/index.asp.
3. The Scientific Community for Consumer Safety Notes of Guidance for the Testing of Cosmetics Ingredients and their Safety Evaluation. 9th revision. September 2015. http://ec.europa.eu/health/scientific_committees/consumer_safety/docs/sccs_o_190.pdf

4. Communication on the EC animal testing and marketing ban http://ec.europa.eu/consumers/sectors/cosmetics/files/pdf/animal_testing/com_at_2013_en.pdf

5. Products and manufacturing facilities should be checked against the relevant standards, available via the European Committee for standardization (CEN) standards (available through http://www.cenorm.be/cenorm/index.htm) and/or ISO standards (available through http://www.iso.org/iso/en/ISOOnline.frontpage).

6. An overview of labeling requirements prepared by the EU Trade Association Cosmetics Europe is available at https://www.cosmeticseurope.eu/publications-cosmetics-europe-association/european-union-cosmetics-directives.html?view=item&id=17

7. An overview of the requirements to prepare a Product Information File (PIF) prepared by the EU Trade Association Cosmetics Europe is available at https://www.cosmeticseurope.eu/publications-cosmetics-europe-association/european-union-cosmetics-directives.html?view=item&id=16

COSMETICS MARKET READINESS ASSESSMENT
SOUTH KOREA

Cosmetics Definition

The term "cosmetic" means any item intended to be used by means of spreading, rubbing, spraying on or otherwise applied to the human body for cleansing, beautifying, promoting attractiveness or brightening the appearance, or maintaining or improving the health of skin and hair, which have light effects on the human body.

	Requiremen	Notes
Local Registration		
	Yes	Persons required to be registered as a marketing authorization holder (MAH), defined as those who intends to distribute or sell, or supply or award, for the purpose of import agency business, the manufactured cosmetics (including manufactured cosmetics by consignment) and imported cosmetics shall file for registration with the Minister of Food and Drug Safety (MFDS). The MAH can be foreign, but must be registered as a local business operator, with an office in Korea.
Product Registration or Notification		
Frequency	Once	Once importers register/notify their products by submitting required documents such as CoM (Certificate of Manufacture), CFS (Certificate of Free Sale), and BSE related via Korea Pharmaceutical Traders Association (KPTA), only required to update if there is a change.
By Product or Product Group	By Product	
Product Specification Requirements		
Safety Assessment	Yes	Once the product has been cleared by Korean Customs, the importer is required to conduct a pre-market quality control test by batch to ensure that the product complies with Korean safety regulations. This test is done within MFDS's authorized laboratories and no third country tests results are accepted.
Raw Material Registration	Yes	South Korea has lists of prohibited and restricted ingredients, specified in Korea's Cosmetics Safety Regulations, which includes conditions of use. The product dossier should include a notarized certificate from the MAH stating that the product does not contain any raw materials, which may be the product at risk for Bovine Spongiform Encephalopahty.
Formula: Quantative, Qualitative or Both	Yes	Certificate of Manufacture (CoM) is required for import procedures. It must have the product name, ingredients, sources of the ingredients, etc., with their supporting documents. A listing of ingredient names must be included in accordance with the International Nomenclature for Cosmetics Ingredients (INCI) and must not be included in the negative list of MFDS. The percentage of each ingredient must be listed next to it. It allows an importer to submit to CoM with an approximate percentage (e.g. 3-5%, etc.) of each ingredient, except ingredients that has restriction in use (including preservatives, colorants, and UV blocking agents) designated by MFDS. The restricted ingredients must be listed with exact percentage. However, as importers are required to keep a CoM with the exact percentage of
Material Safety Data Sheet: Raw Materials		No MSDS (raw materials) required when single component ingredients are imported. However, MSDS is necessary when mixture/complexed ingredients are imported.
Material Safety Data Sheet: Product		Note Korea does not require a MSDS (product) for regular cosmetics, but the information can be used to answer some sections. In order to obtain pre-market approval from the MFDS, more documents are required to prove safety & efficacy, or functions of the products.
Preservative Efficacy	Yes	Regulation of Safety Standard of Cosmetics defines standards of negative ingredients, restricitve ingredients (biocides/antimicrobials and preservatives/UV filters) used in cosmetics.
Nationally Certified Testing Facility	Yes	Importers are required to conduct a pre-market quality control test to ensure that the product complies with Korean safety regulations. This test is done within MFDS's authorized laboratories
Animal Testing	No	Animal test is not required; according to regulations for the functional cosmetics evaluation , a person who intends to manufacture or import cosmetics containing ingredients introduced to the Republic of Korea *for the first time* that have not been designated or publicly notified as cosmetic ingredients by MFDS shall undergo an evaluation on specifications and standards and safety of such ingredients, before manufacturing or importing them. Information shall be submitted for safety and effectiveness of functional cosmetics and one of the info is a single dose toxicity testing info, which is related with animal testing. However, In the case that the validity is recognized in the terms of testing method and evaluation criteria, the prescribed/necessary testing method may not be applied. (animal test alternatives)
Packaging Assessment	Yes	When a manufacturer-seller sells manufactured or imported cosmetics, he/she shall use child-proof containers and packages to prevent children from being poisoned by misuse.
Product Stability	Yes	Conditions must be provided to secure the safety, quality of the products. - Includes storage conditions, date of durability and expiration date.
Good Manufacturing Practice	Yes	Korea has a national GMP standard to which companies self-certify. Certification is not mandatory but recommended. MFDS reserves the right to inspect manufacturing facilities.
Proof of Claims	Yes	A manufacturer, manufacturer-seller or seller shall be able to demonstrate matters of relevant factors in labeling and advertisements which he/she has placed.
Trademark Registration	No	

Product Sample	Yes	
Labeling		See notes below
Country of Origin	Yes	Product name and address of a manufacturer and market authorization holder should be stated in packaging.
Nominal Content: Weight or Volume	Yes	Volume or weight of contents should be stated in packaging.
Registration Number	Yes	Manufacturing lot number is needed.
Language Requirement	Yes	Marking and labeling on the package should be readable in the Korean language. That Chinese characters or foreign languages may be used together, and in cases of a product for export, the language of the export target country may be used.
Product Function	Yes	product name should be written. For functional cosmetics, the word "function cosmetics" must be stated.
Formula: Quantative, Qualitative or Both	Yes	All ingredients used in manufacturing the relevant cosmetic should be stated.
Fragrances	No	Listed as fragrance on the product.
Percentage of Ingredients Claimed	No	
Alcohol Content	No	
Information on Product Use	Yes	A copy of the product guide written in the Korean language is necessary
Warning Statements	Yes	Cautions for use should be stated.
Manufacturer Name and Address	Yes	Product name and address of a manufacturer and market authorization holder should be stated in packaging.
Importer Name and Address	Yes	Product name and address of a manufacturer and market authorization holder should be stated in packaging.
Date of Durabilty	Yes	Use-by date or best-before date after opening (the date of manufacture shall be also entered when the best-before date after opening is entered) shoud be stated.
Storage Conditions	Yes	A storage place in which raw materials, other materials and products are stored
Expiration Date	Yes	When period after opening (POA) is indicated in the cosmetics, expiration date before opening and production date should also be displayed in the package or container.
Claims	Yes	The Minister of Food and Drug Safety is deemed necessary to conduct due to the likeliness to deceive customers by exaggerating facts or misleading customers, from among the packages of cosmetics, or labelling and advertisements by media or tools of advertisements of cosmetics
Environmental Labeling	Yes	In cases of labeling "organic farming" and to advertise, content of materials must be written.
Certificate of Free Sale		
By Product	Yes	
Post Market Monitoring		
Consumer Hot Line	Yes	Importers must have a system to provide and retain information in response to customer inquiries.
Notification of Local Authorities	Yes	A manufacturer shall take measures againtst the recall cosmetics and submit within five days after becoming aware of the fact that the cosmetics are subject to recall, and a recall plan should be provided to the head of the local food and drug safety office with documents.
Recall	Yes	The Minister of Food and Drug Safety shall order manufacturer-sellers, manufacturers, sellers or other persons handling cosmetics for business to take measures such as recalling and discarding the relevant goods, where the cosmetics that they have sold, stored, displayed, manufactured, or imported in violation of Article 7, 9, 15 or 16 (1), or the raw materials, ingredients, etc. (hereinafter referred to as "goods") are likely to cause harm to national health
Government Fee to Notify/Register		When a foreign supplier exports its regular cosmetic products to Korea, its importer is required to submit an import permission request called the “entry notice for customs clearance” through Electronic Data Interchange (EDI) to KPTA. It will take 3-4 days for KPTA to complete the documents review. EDI fee is approx. $4.5 for three items/$0.6 for additional item.
Time to Process		

Product Classification:

Under the Korea’s Cosmetics Act, all foreign cosmetics are required to obtain import permission from the Ministry of Food & Drug Safety (MFDS) before they are imported into Korea. In Korea, cosmetics fall under two categories: functional cosmetics and regular cosmetics. Functional cosmetics contain whitening, anti-wrinkle, and sunscreen & sun tanning products. MFDS reviews only functional cosmetics for pre-market approval. For all other regular cosmetics, the Korea Pharmaceutical Traders Association (KPTA) has been authorized by MFDS to review and certify the import permission request submitted by the Korean importer.

Functional Cosmetics

Functional cosmetics refer to to cosmetics that are helpful in skin-whitening by curbing the formation of marks, freckles through the prevention of skin pigmentation of melanin; cosmetics that are helpful in skin-whitening by fading melanin pigmentation in skin; cosmetics that smooth or improve the skin wrinkles by firming the skin aiding in the whitening of the skin; cosmetics that help to tanning the skin by screening strong sun light;cosmetics that can protect the skin from ultraviolet rays by intercepting or scattering them. On August 25, 2016, amendments were proposed to expand the scope of functional cosmetics from 3 types into 11(Proposed date of adoption: 2017.5.31)

Local Business Partner Requirements

1. Link to the Cosmetics Act: http://elaw.klri.re.kr/kor_service/lawView.do?hseq=33658&lang=ENG

2. Enforcement Rules of the Cosmetics Act: http://elaw.klri.re.kr/kor_service/lawView.do?hseq=38682&lang=ENG

COSMETICS MARKET READINESS ASSESSMENT
JAPAN

Cosmetics Definition

Cosmetics refer to articles with mild action on the human body, which are intended to be applied to the human body through rubbing, sprinkling or other methods, aiming to clean, beautify and increase the attractiveness, alter the appearance or to keep the skin or hair in good condition. Products in this category include: perfume, makeup, skin care (lotion and cleansing creams), shampoo and shaving creams.   So long as these products do not include ingredients on Japan's prohibited lists, the product does not have to be registered in Japan. Japan only requires notification via their online system.

	Requirements	Notes
Local Registration		
Legal Representative	Yes	Companies intending to import on a commercial basis must register for a license in partnership with a local company. This must be done at the appropriate local government office for each business location.
Product Registration or Notification	Notification	Pharamceutical and Medical Devices Act (PMD Act) only requires notification for cosmetics, so long as the product formulation meets Japan's Standard for Cosmetics : Notification No.331/2000. Products which do not meet the Standard can be registered/approved by Ministry of Health, Labor and Welfare (MHLW) on condition that proper safety assessment is submitted. Standard includes: Negative list (prohibited ingredients), and Positive list (preservatives, UV filters and Japanese legal color index colorants, etc).
Frequency	Yes	Once before first importation
By Product or Product Group	Yes	By Product
Product Specification Requirements		
Safety Assessment	No	No legal requirement, but the marketer (distributor) assumes responsibility.
Raw Material Registration	No	Not required by law
Formula: Quantitative, Qualitative or Both	No	Not required by law, but the marketer (distributor) require quantitative information.
Material Safety Data Sheet: Raw Materials	No	Not required by law
Material Safety Data Sheet: Product	No	Not required by law
Preservative Efficacy	No	Not required by law
Nationally Certified Testing Facility	No	Not required. Qualified testing facility can be used by the marketer (distributor) as appropriate.
Animal Testing	No	Not required
Packaging Assessment	No	Not required
Product Stability	No	No required
Good Manufacturing Practice	No	No legal requirement. This is a voluntry industry standard imposed by Japan Cosmetic Industry Association (JCIA) based on ISO22716. Compliance with GQP (Good Quality Practice) and GVP (Good Vigilance Practice) are statutory requirements .
Proof of Claims	No	Claims have to be within the designated list: Iyakuhatsu No. 1339/2000 and Yakusyokuhatsu No.0721-1/2011.
Trademark Registration	No	Not required to market the product in Japan, but it may be advised to protect the product and company's intellectual property.
Product Sample	No	
Labeling		
Country of Origin	Yes	
Nominal Content: Weight or Volume	Yes	Standard weight or volume per unit
Registration Number	No	
Manufacturing Number	Yes	

Language Requirement	Yes	Must be labeled in Japanese
Product Function	Yes	As necessary, specify if Soap
Formula: Quantitative, Qualitative or Both	Yes	Use Japanese version of INCI (International Nomenclature for Cosmetics Ingredients). A full incredient listing in descending order of content.
Fragrances	Yes	Allowed to list as "Fragrances"
Percentage of Ingredients Claimed	No	
Alcohol Content	No	
Information on Product Use	Yes	Allows for labeling on container, packaging and/or inserts.
Warning Statements	Yes	If DMDM hydantoin and Imidazolidinyl urea are mixed for shampoos and soaps. For aerosols and products deemed hazardous: High Pressure Gas Safety Act and the Fire Service Act define label.
Manufacturer Name and Address	No	
Importer Name and Address	Yes	
Date of Durabilty / Period after Opening	No	
Storage Conditions	No	
Expiration Date	Yes	Include, if less than 3 years.
Claims	Yes	Industry uses Standards for fair advertisement practices of drugs, quasi-drugs, cosmetics, and medical devices under Article No.66 of PMD Act, Codes of fair competition for representation of Cosmetics, Cosmetics Soaps, and Premium Offers in the Cosmetic Industry, under certification, by the Premium and Representations Law.
Environmental Labeling	Yes	Act on the Promotion of Effective Utilization of Resources
Certificate of Free Sale		
By Product	No	
Post Market Monitoring		
Consumer Hot Line	Yes	Importers must have a system to provide and retain information in response to customer inquiries.
Notification of Local Authorities	Yes	Information must be provided to both local and national authorities
Recall	Yes	Importers should have procedures for registration and tracking of product delivery, processing and withdrawal of defective products, per GVP standards.
Government Fee to Notify/Register	No	No charge for cosmetic notification
Time to Process	1 Day	One day for cosmetic notification

Product Classification

MHLW reviews notification to ensure that the product is a cosmetics and not a quasi drug or drug, based on : the formulation of a product and the level of active ingredients, as well as application method, dosage and product appearance. The definition of a quasi-drug is as follows:

A quasi-drug is defined as:(1) Preventing nausea and other discomfort. (2) Preventing heat rash, soreness, etc. (3) Encouraging hair growth or removing hair, or (4) Exterminating and preventing mice, flies, mosquitoes, fleas, etc. Among the quasi-drugs are sunscreens, deodorants, depilatories, hair growth treatments, hair dyes, perm and straightening products, as well as medicated cosmetics, such as whitening products, anti-aging products and oily skin or acne treatment products. Besides, the item shall have mild effects on the human body, shall not be a utensil or device, and shall be designated by the MHLW based on these characteristics.

Product Notification

Cosmetics products have to be notified via ~~three venues:~~

Local Government (Prefecture)

Foreign Manufacturer Notification

For a quasi-drug registration, foreign manufacturer is required to be accredited by the Ministry of Health, Labour and Welfare.

For cosmetics, filing of notification with the name and address of foreign manfucturer and/or marketing entity will suffice.

Local Business Partner Requirements

Overseas manufacturers currently cannot sell in country directly without a local distributor. Two licenses are required for in-country business partner companies.

a. Local Marketing: Distributors "keshohin seizohanbaigyo kyoka" that take all the responsibilities on the market, on the commercial basis from the appropriate local government offices for each business office location.

1. General Marketing Business Controller “sokatsu seizoh hanbai sekininsha”.

(i) licensed pharmacist or (ii) a specialist who has completed university-level or (iii) equivalent pharmacology or chemistry courses.

2. Product Quality Manager “hinshitsu hoshoh sekininsha”

3. Safety Control Manager “anzen kanri sekininsha”

b. Local Manufacturing : Manufacturers “keshohin seizogyo kyoka,” that engage only in final packaging, Japanese labeling and storage, with one required for each manufacturing location.

Responsible Technical Manager “sekinin gijyutsusha”

(i) licensed pharmacist or (ii) a specialist who has completed university-level or (iii) equivalent pharmacology or chemistry courses.

Additional Resources

1. “Standards for Cosmetics, Notification No.331/2000”, amended April 2016. Evaluation and Licensing Division, Pharmaceutical and Food Safety Bureau Ministry of Health, Labour and Welfare (Japan).
   http://www.mhlw.go.jp/file/06-Seisakujouhou-11120000-Iyakushokuhinkyoku/0000032704.pdf

2. Japanese Version of the "List of Cosmetic Ingredient Label Names."
   Compiled by the Japan Cosmetic Industry Association (JCIA) to be used in conjunction with the ~~Pharmaceutical Affairs Act's~~ PMD Act's requirement to list all ingredient names on the labeling. If a new label name needs to be devised, then a request can be filed with the JCIA. Label names shall be, in principle, translated into Japanese from the International Nomenclature of Cosmetic Ingredients (INCI) published by the Personal Care Products Association (PCPC) of the United
   The list of JCIA publication (Japanese version only) is available http://www.jcia.org/n/en/jcia/d/
   The application procedure: http://www.jcia.org/n/all_pdf/en/ApplicationProcedures_for_JapaneseLabelingName.pdf

3. Pharmaceuticals and Medical Devices Agency
   https://www.pmda.go.jp/english/pnavi_e-07.html

4. Cosmetic Fair Trade Council Japan
   http://www.cftc.jp/english/index.html

5. Yakuji Nippo Ltd. for English publications
   http://yakuji-shop.jp/SHOP/547558/547972/list.html

COSMETICS MARKET READINESS ASSESSMENT
CHINA

Cosmetics Definition

China defines cosmetics as products which are applied to any parts of the human body (skin, hair, nails, lips, etc.) by rubbing, spraying, or other similar approaches for the purpose of cleaning, removing bad odors, protecting the skin, beautifying, and making up. Within this definition, China has two classes of cosmetics products: Ordinary and Special, which includes products that have active ingredients that change body functions. Products classified as Ordinary include: Skin Care (lotion, moisturizer, toner, anti-aging, anti-acne, etc); Make-up; Hair Care (shampoo, conditioner, etc); Perfumes and Nail Care. Special cosmetics include skin products to remove spots or whiten the skin; Sun Protection (SPF/PA); hair dyes, relaxers and other chemical treatments; Hair loss; Anti-Perspirants; Depilatory; Body Shaping and Child/Baby products.

	Requirements	Notes
Local Registration		
Legal Representative	Yes	Companies intending to import must assign a legal entity, known as the "responsible person" in China to undertake registration. This entity as well as the manufacturer are responsible for ensuring the product meet China's national standards. For products produced under a contract manufacturing agreement, a copy of the production agreement is required.
Product Registration or Notification	Register	
Frequency	Yes	Every four years, with sample testing not required for renewal, unless there is a change in product specifications or China's test standards.
By Product or Product Group	Yes	China allows by product type, so need to clarify if each individual product requires a registration.
Product Specification Requirements		
Safety Assessment	Yes	For products that contain ingredients that are restricted, a safety assessment is required. The assessment should be performed by a third licensed party, qualified in either medicine, pharmacy, chemistry, toxicology or relevant fields, and have over five years' experience.
Raw Material Registration	Yes	China has lists of prohibited, restricted and allowed ingredients, which includes conditions of use. If an ingredient is not on one of these lists, then it must be registered before use in a product. Letter of commitment stating that the cosmetic ingredients meet therestriction requirements of high-risk substances from regions with high incidence of mad cow disease.
Formula: Quantative, Qualitative or Both	Yes	China requires all imported products to be ingredient tested by local labs. In the product dossier, all ingredients present at 0.01% or greater should be identified by the Chinese INCI name, with special requirements for preservatives, sunscreens, colorants and hair dyes. Ingredients used in special cosmetics that provide function must be identified, with supporting information.
Material Safety Data Sheet: Raw Materials	Yes	
Material Safety Data Sheet: Product	Yes	
Preservative Efficacy	Yes	China provides requirements as to microbiological counts and types of permitted bacteria.
Nationally Certified Testing Facility	Yes	For products sold only in China, products must be tested on Chinese subjects.
Animal Testing	Yes	For both ordinary and special cosmetics.
Packaging Assessment	Yes	Direct contact materials should be toxin free.
Product Stability	Yes	Provide conditions required for safe storage of the product.
Good Manufacturing Practice	Yes	China follows ISO 22716 for Good Manufacturing Practices.
Proof of Claims	No	CFDA provides guidance on product claims, including guidance on product names. Claims of medicinal or therapeutical properities are prohibited.
Trademark Registration	No	
Product Sample	Yes	Samples of the product and packaging required
Labeling		
Country of Origin	Yes	Country of origin on the Chinese label.
Nominal Content: Weight or Volume	Yes	
Registration Number	Yes	Assigned at registration, representing product type, approved date and sequence number. Must be on the product.
Language Requirement	Yes	Chinese label.
Product Function	Yes	On the Chinese label, must include the Chinese product name per the Cosmetic Naming Rule
Formula: Quantative, Qualitative or Both	Yes	All ingredients present at 1% or greater should be identified by the Chinese INCI name. Some special requirements by products, e.g. baby products require nano labeling.
Fragrances	No	

Percentage of Ingredients Claimed	No	This refers to a requirement in some countries that percentages of active ingredients be listed.
Alcohol Content	No	
Information on Product Use	Yes	Safety tatement and guidance on use in Chinese
Warning Statements	Yes	In Chinese, warnings for products that contain restricted ingredients, as well as for special cosmetics.
Manufacturer Name and Address	Optional	Name and address of overseas manfucturer
Importer Name and Address	Yes	Local distribtor or wholesaler information with the company code on the product label.
Date of Durabilty	Yes	Combination of production date and period after manufacturing or batch number of data of minimum durability.
Storage Conditions	Yes	Should be provided if necessary for safety assurance.
Expiration Date	No	See comments on date of durability.
Claims	Yes	Misleading information, including medical and therapeutic claims are prohibited.
Environmental Labeling	No	
Certificate of Free Sale		
By Product	Yes	Accept from FDA, state governments or trade associations in the country of origin.
Post Market Monitoring	Yes	
Consumer Hot Line	No	
Notification of Local Authorities	Yes	The importer should register with local Administration of Industry and Commerce (AIC) and China AQSIQ, with its company name, address, POC, contact information and product information. The importer should also maintain a sales record including recall record. (Effective from March 1, 2017)
Recall	Yes	Importers should have procedures for registration and tracking of product delivery, processing and withdrawal of defective products, and inform AIC and AQSIQ in a timely manner.
Government Fee to Notify/Register	Yes $1,000	For ordinary cosmetics. Special use starts at $3,000 and ingredient registration starts at $12,000 not including testing fees and risk assessment.
Time to Process	4-8 months	4 - 8 months for ordinary cosmetics, 8 - 15 months for special use cosmetics

Product Registration

China has two levels of registration for imported cosmetics. Product classified as ordinary must apply for a registration certificate. Products classified as special must apply for a hygiene liscense. The registration requirements are somewhat similar, with special cosmetics having to justify function of active ingredients and provide a human safety assessment.

Additional Resources

1. Two guides for importing cosmetics to China are as follows:
   - Guidance in a Nutshell: Steps to Exporting Cosmetics Products to China. Reach24 Consulting Group. http://www.in-cosmetics.com/__novadocuments/45611?v=635274255261670000
   - Guidance on Exporting Cosmetics to China. CIRS Consulting Group: http://www.cirs-reach.com/Guidance_on_Exporting_Cosmetics_to_China_2012.pdf
2. CFDA requirements for registration of imported special use cosmetics: http://eng.sfda.gov.cn/WS03/CL0772/98105.html
3. CFDA requirements for registration of ordinary cosmetics: http://eng.sfda.gov.cn/WS03/CL0772/98099.html
4. CFDA requirements for approval of new cosmetics ingredients: http://eng.sfda.gov.cn/WS03/CL0772/98092.html
5. New CFDA safety and technical standard for cosmetics, including test methods and ingredient lists. Goes into effect December 2016: http://www.sda.gov.cn/directory/web/WS01/images/MjAxNcTqtdoyNji6xbmruOa4vbz+LnBkZg==.pdf

COSMETICS MARKET READINESS ASSESSMENT
ASEAN

Participating Countries: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam

Cosmetics Definition

A “cosmetic product” shall mean any substance or preparation intended to be placed in contact with the various external parts of the human body (epidermis, hair system, nails, lips and external genital organs) or with the teeth and the mucous membranes of the oral cavity with a view exclusively or mainly to cleaning them, perfuming them, changing their appearance and/or correcting body odours and/or protecting them or keeping them in good condition. Defintion includes sunscreens, anti-wrinkle products and anti-perspirants, as well as products which exhibit the following claims: dandruff, cellulite, hair loss, bust contouring, acne and anti-bacterial. A full list of products classified as comsetics are available in Annex I of the ASEAN Cosmetics Directive.

	Requirements	Notes
Local Registration		
Legal Representative	Yes	Legal representation requirements are governed by each ASEAN member state. Once a product is notified in one ASEAN country, other member states may only require a Letter of Notification or may require a full product dossier before the product can be marketed.
Product Registration or Notification	Both	Some countries, such as Indonesia still require registration. Information included in the PIF (Product Information File) must be available in English and some countries may also require their national language.
Frequency	Yes	Validity period is set by each ASEAN member, up to three years. See separate table
By Product or Product Group	Yes	ASEAN allows for a single notification for product groups, with the requirement that the formulations and other supporting information are provided for each product, if there are differences in the ingredients used, e.g. for color variations. However not all countries are in compliance.
Product Specification Requirements		
Safety Assessment	Yes	In the EU, this is labeled as the “Cosmetic Product Safety Report,” which is filed as part of the Product Information File or (PIF). For normal and foreseeable use. EU regulations list risk endpoints required and array of tests that can be used to assess the safety in terms of hazard and exposure of both the final product and the substances in the formula. For fragrance materials provide certificate of compliance with the latest IFRA guidelines.
Raw Material Registration	No	The ASEAN Handbook of Cosmetic Ingredients identifies substances that are either banned from products destined for sale within in ASEAN, subject to restrictions or, in the case of colorants, preservatives and UV filters, are expressly permitted. For restricted materials, a special dossier, notified to ASEAN is required six months prior to placing a product on market. All raw materials should listed in the PIF. Individual countries may authorize the use within its territory of other substances, not contained in the lists of substances listed in the ASEAN Cosmetics Directive Annexes, for up to three years. Ingredients of animal origin and botanics have special requirements and should be declared. For ingredients listed in the Annexes, toxicological and safety assessment information is not required, if for listed use. Novel uses may require new ingredient data, and product exposure for the list of cosmetics products listed in Annex I is expected. General chemical regulations for each country should also be consulted by your distributor.
Formula: Quantative, Qualitative or Both	Yes	All substances supplied as raw materials should be identified and quantified in ascending order down to 0.01%, supported by a Certificate of Analysis. Accept the following sources of ingredient nomenclature: International Cosmetic Ingredient Dictionary (INCI); British Pharmacopeia; United States Pharmacopeia and Chemical Abstract Services. For fragrances, also include composition name and code number, and identity and address of the supplier.
Safety Data Sheet: Raw Materials	No	PIF does not require these, but the information can be used to answer some sections.
Safety Data Sheet: Product	No	PIF does not require these, but the information can be used to answer some sections.
Preservative Efficacy	Yes	Must be an approved preservative and provide criteria used for microbiological control
Nationally Certified Testing Facility	NA	Differs by country, with ASEAN encouraging locally relevant results. See separate chart.
Animal Testing	No	No bans currently, but the ASEAN safety assessment notes that animal testing is not required
Packaging Assessment	No	
Product Stability	Yes	Includes storage conditions, date of durability and expiration date, supported by a certified lab analysis.
Good Manufacturing Practice	Yes	GMP self-certification accepted, should follow ASEAN Guidelines. Responsible agent and importer should keep on file, in case requested.
Proof of Claims	Yes	When justified by a claimed effect, supporting technical information required.
Trademark Registration	No	

Product Sample		
Labeling		
Country of Origin	Yes	Country of manufacture
Nominal Content: Weight or Volume (?)	Yes	Metric or imperial labeling system
Registration Number	No	Differs by country. See separate chart.
Language Requirement	Yes	Labeling must be provided in a language common among country-level consumers.
Product Function	Yes	Not required if implicit from packaging.
Formula: Quantative, Qualitative or Both	Yes	A complete list in percentage order, preceded by the word ingredients. Ingredients of animal origin must be declared, with bovine or porcine specified.
Fragrances	No	Listed using IFRA nomenclature
Percentage of Ingredients Claimed	No	No special reguirements
Alcohol Content	No	
Information on Product Use	Yes	If warnings, ingredients and product use information do not fit on packaging, include a leaflet, tape or card, with reference or pictorial that the info is included on the product container.
Warning Statements	Yes	Requires specific precaution wording on use conditions to be included on the label for both specific ingredients and products as specified in Annex III.
Manufacturer Name and Address	No	Manufacturer address not required, but manufacturer batch number is
Importer Name and Address	Yes	Name and address of the distributor in the final market
Date of Durabilty	Yes	Pictorial symbol, which includes month and year (day optional) to show product functionality once opened
Storage Conditions	No	
Expiration Date	Yes	Month and Year, proceded by the term "Expiry Date" or "Best Before"
Claims	Yes	Allows with claim justified by substantial product or formulation based evidence. Claimant can use its own data and scientifically-justified protocals to justify. ASEAN Claims guidance provides recommdations of terms of avoid.
Environmental Labeling	No	
Certificate of Free Sale		
By Product	Yes	Requirements differ by country, see separate table. TPP members will no longer require when agreement is passed
Post Market Monitoring	Yes	See link to guidance document on adverse event reporting
Consumer Hot Line	NA	Not specified
Notification of Local Authorities	Yes	The Responsible Agent is obligated to notify national authorities of any serious events as defined in the ASEAN guidance.
Recall	NA	Not specified
Government Fee to Notify/Register	See ASEAN Annex	
Time to Process	See ASEAN Annex	

Notes

Signed into force in 2007, the ASEAN Cosmetics Directive provides for mutual recognition of market authorization; therefore, once a product is registered in one country, it applies across all member states. However, there are still some differing national level requirements; therefore, the information provided here may not always reflect the compliance requirements in each ASEAN member state. The overview provided here, cites many, but not all of the requirements where there may be differences. In addition, companies must still then notify their product across each new ASEAN country into which they enter.

Local Business Partner Requirements

Registration requirements for overseas manufacturers and their local distributors are prescribed by the local Authorities e.g. Licence to Operate, Certificate of Incorporation of the Company, etc.
Responsible Agent**:** a legal or natural person based within the ASEAN country where the product is registered. ASEAN requires that the safety assessor, who also contributes to the preparation of the PIF, be independent.

Additional Resources

1. ASEAN Cosmetics Directive: http://www.hsa.gov.sg/content/hsa/en/Health_Products_Regulation/Cosmetic_Products/Overview/ASEAN_Cosmetic_Directive.html Included in the Directive are the following annexes:

Annex I: Products considered cosmetics
Annex II : Prohibited ingredients list
Annex III : Restricted ingredients list
Annex IV : Colorants positive list
Annex VI : Preservatives positive list
Annex VII : UV Filters positive list

2. List of ASEAN Ingredients Annexes: http://aseancosmetics.org/default/asean-cosmetics-directive/technical-documents

3. ASEAN Guidelines for Microbiological Limits in Cosmetics Products: http://www.hsa.gov.sg/content/dam/HSA/HPRG/Cosmetic_Products/Microbiological%20limit%20in%20cosmetic%20products_2012.pdf

3. ASEAN Product Information File (PIF) Guidelines: http://www.hsa.gov.sg/content/dam/HSA/HPRG/Cosmetic_Products/Guidelines%20for%20Product%20Information%20File%20(PIF).pdf

4. ASEAN Guidelines for Safety Assessment: http://bpfk.moh.gov.my/images/Guidelines_Central/Guidelines_on_Cosmetic/Annex_I_Part_6_.pdf

5. ASEAN Cosmetics Labeling Requirements: http://www.hsa.gov.sg/content/dam/HSA/HPRG/Cosmetic_Products/Appendix%20II%2004%20September%202007A.pdf

6. ASEAN Cosmetics Claims Labeling: http://www.hsa.gov.sg/content/dam/HSA/HPRG/Cosmetic_Products/Appendix%20III%2010%20September%202007A.pdf

7. ASEAN Guidance on Cosmetics Good Manufacturing Practices: http://www.hsa.gov.sg/content/dam/HSA/HPRG/Cosmetic_Products/Appendix%20VI%20(ASEAN%20Guidelines%20for%20Cosmetic%20Good%20Manu

8. ASEAN Guidance on Adverse Event Reporting: http://bpfk.moh.gov.my/images/Guidelines_Central/Guidelines_on_Cosmetic/Annex_1_Part_11_.pdf

9. ASEAN Guidance on Evaluating the Safety of Botanical Raw Materials Used in Cosmetics:

10. ASEAN Guidance on Sunscreen/Sunscreen Protection Factor Labeling: http://www.fda.gov.ph/attachments/article/15927/ASEAN%20Sunscreen%20Guidelines%20rev01%20May%202015.pdf

11. Relevant trade associations for the industry that provide support and documentation on exporting cosmetics and personal care products:

ASEAN Cosmetics Association: http://aseancosmetics.org

ASEAN Table: Cosmetics						
	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Authoritative Body	National Agency of Drug and Food Control (BPOM)	National Pharmaceutical Control Bureau	Philippines Food and Drug Administration	Health Sciences Authority	Food and Drug Administration	Ministry of Health
Paper or Online	Both	Online	Online	Online	Online	
Registration / Notification (1)	Registration	Notification	Notification	Notification	Notification	
Fee		RM 50 for product and variants		$10-$25 per product, with up to $10 per variant		
Time to Process	14 days after notification submitted, can take much longer	1-3 Days				
Validity		2 Years		1 Year		
CFS Requirement	Yes	Yes	Yes		Yes	Yes
Registration No.	Not required on the label	Not required on the label	Not required on the label	Not required on the label	Not required on the label	Not required on the label
Local Testing Requirements	Maybe	No		No		
Other	Indonesia's new Halal law may require all imported cosmetics products to follow national halal standards by 2019.	Not required, but adherence to MS1500:2400 for Halal food of interest				

1. The ASEAN Cosmetics Directive requires acknowledgement of notification for ordinary cosmetics within three working days; some countries take longer.

Australia Personal Care and Cosmetics Trade
2011-2015

Table 1:Australia Total Personal Care and Cosmetics Imports

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Imports
3301	Essential Oils	$35,358	$36,741	$35,538	$39,183	$49,711	7%	40%	2.00%
330290	Fragrances & Substances Used as Inputs	$33,418	$35,571	$31,835	$37,418	$31,518	-1%	-1%	1.27%
3303	Perfumes And Toilet Waters	$273,882	$332,292	$351,877	$310,746	$311,249	3%	-12%	12.54%
3304	Make-Up & Skin-Care Preparations	$558,672	$563,269	$590,246	$633,433	$668,731	4%	13%	26.94%
3305	Hair Care Products	$213,444	$204,555	$225,536	$225,067	$225,991	1%	0%	9.10%
3306	Oral & Dental Hygiene	$73,064	$85,631	$90,519	$96,746	$104,969	8%	16%	4.23%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$144,418	$137,849	$134,075	$133,318	$131,390	-2%	-2%	5.29%
3401	Soap & Other Products to Wash the Skin	$187,972	$192,225	$199,545	$219,176	$224,903	4%	13%	9.06%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$115,968	$191,131	$133,196	$145,883	$156,562	6%	18%	6.31%
4818	Personal Care Wipes, Diapers, Tampons	$320,055	$185,782	$189,478	$188,302	$194,085	-10%	2%	7.82%
5601	Sanitary Towels and Napkins	$41,178	$27,070	$25,929	$27,946	$27,311	-8%	5%	1.10%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$128,029	$133,223	$137,054	$155,799	$163,409	5%	19%	6.58%
9605	Toilet Sets for Personal Travel	$7,009	$7,434	$7,087	$7,509	$7,766	2%	10%	0.31%
9619	Diapers and Fem Hygiene	NA	$222,018	$227,665	$226,782	$216,329	NA	NA	8.71%
	Total Imports	$2,099,051	$2,319,219	$2,347,746	$2,409,891	$2,482,404	3%	6%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Australia Personal Care and Cosmetics Trade
2011-2015

Table 2: Australia Imports of Personal Care and Cosmetics Products from the U.S.

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$4,440,640	$4,411,339	$4,577,130	$7,189,142	$13,839,588	26%	202%	2.57%
330290	Fragrances & Substances Used as Inputs	$47,588	$39,226	$18,330	$175,194	$176,573	30%	863%	0.03%
3303	Perfumes And Toilet Waters	$118,266,349	$161,563,409	$178,782,815	$137,152,191	$138,662,330	3%	-22%	25.73%
3304	Make-Up & Skin-Care Preparations	$183,110,143	$190,542,408	$194,369,816	$215,540,086	$239,410,396	6%	23%	44.42%
3305	Hair Care Products	$51,233,261	$46,646,517	$46,279,339	$52,612,891	$54,215,004	1%	17%	10.06%
3306	Oral & Dental Hygiene	$10,451,903	$10,108,445	$11,717,602	$15,748,844	$13,711,516	6%	17%	2.54%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$19,561,444	$20,966,666	$20,340,694	$35,078,000	$30,498,213	9%	50%	5.66%
3401	Soap & Other Products to Wash the Skin	$23,661,387	$29,014,135	$32,370,685	$25,347,484	$25,818,033	2%	-20%	4.79%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$2,620,996	$1,563,042	$2,232,449	$155,229	$226,279	-39%	-90%	0.04%
4818	Personal Care Wipes, Diapers, Tampons	$33,953,141	$19,238,924	$20,028,869	$18,881,753	$10,513,273	-21%	-48%	1.95%
5601	Sanitary Towels and Napkins	$2,143,000	NA	$393,458	$938,729	$1,055,521	-13%	168%	0.20%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$7,874,144	$7,773,553	$7,773,553	$7,356,797	$8,012,302	0%	3%	1.49%
9605	Toilet Sets for Personal Travel	$142,499	$94,706	$16,607	$59,611	$22,622	-31%	36%	0.00%
9619	Diapers and Fem Hygiene	NA	$16,977,205	NA	$3,300,843	$2,851,882	NA	NA	0.53%
	Total Imports	$457,506,495	$508,939,575	$518,901,347	$519,536,794	$539,013,532	1%	4%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 3: Australia's Imports of Personal Care and Cosmetics Products from China

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$8,628,899	$6,473,006	$6,625,775	$7,800,712	$23,431,269	22%	254%	5.07%
330290	Fragrances & Substances Used as Inputs	$1,429,836	$1,298,193	$1,414,169	$2,819,758	$2,435,963	11%	72%	0.53%
3303	Perfumes And Toilet Waters	$2,202,563	$2,186,965	$2,378,172	$2,540,249	$3,487,719	10%	47%	0.75%
3304	Make-Up & Skin-Care Preparations	$29,638,230	$29,442,614	$30,482,573	$29,662,789	$32,223,314	2%	6%	6.97%
3305	Hair Care Products	$5,019,083	$4,942,933	$7,080,540	$6,566,029	$7,299,794	8%	3%	1.58%
3306	Oral & Dental Hygiene	$2,103,782	$3,181,748	$4,149,298	$3,876,522	$3,740,119	12%	-10%	0.81%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$25,495,162	$21,547,042	$25,606,073	$34,411,760	$41,508,235	10%	62%	8.97%
3401	Soap & Other Products to Wash the Skin	$29,214,777	$41,206,567	$46,758,689	$45,124,975	$41,105,786	7%	-12%	8.89%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$45,155,883	$92,875,076	$52,121,883	$72,076,005	$77,871,326	12%	49%	16.83%
4818	Personal Care Wipes, Diapers, Tampons	$49,300,941	$36,436,524	$65,311,283	$83,929,364	$114,302,370	18%	75%	24.71%
5601	Sanitary Towels and Napkins	$9,158,378	$8,563,790	$8,438,222	$8,749,552	$10,343,955	2%	23%	2.24%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$69,321,306	$72,711,342	$81,012,798	$86,237,717	$100,264,721	8%	24%	21.67%
9605	Toilet Sets for Personal Travel	$2,708,593	$6,956,416	$5,949,915	$6,933,080	$4,586,424	NA	NA	NA
9619	Diapers and Fem Hygiene	NA	$16,013,305	$18,658,150	$18,435,918	$21,058,819	NA	NA	NA
	Total Imports	$279,377,433	$327,822,216	$337,329,390	$390,728,512	$462,600,995	11%	37%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 4: Australia's Imports of Personal Care and Cosmetics Products from Japan

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	NA	NA	$3,146	NA	$40,105	NA	1175%	0.16%
330290	Fragrances & Substances Used as Inputs	NA	$4,961	$8,064	NA	$5,471	NA	-32%	0.02%
3303	Perfumes And Toilet Waters	$11,768	NA	NA	$20,850	NA	NA	NA	NA
3304	Make-Up & Skin-Care Preparations	$3,690,209	$3,260,360	$3,203,291	$4,524,160	$5,932,502	10%	85%	23.27%
3305	Hair Care Products	$1,165,342	$630,790	$560,669	$829,775	$718,646	-9%	28%	2.82%
3306	Oral & Dental Hygiene	$3,152,919	$3,107,157	$2,593,375	$1,289,753	$1,124,177	-19%	-57%	4.41%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$138,197	$512,139	$179,126	$687,148	$295,545	16%	65%	1.16%
3401	Soap & Other Products to Wash the Skin	$1,565,628	$1,966,096	$1,168,719	$1,690,684	$1,349,247	-3%	15%	5.29%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$19,730	NA	$11,015	$18,093	$6,380	NA	-42%	0.03%
4818	Personal Care Wipes, Diapers, Tampons	$2,094,076	$91,729	$36,592	$28,206	$61,914	-51%	69%	0.24%
5601	Sanitary Towels and Napkins	$45,124	$82,596	$2,172	$104,222	$88,987	15%	3997%	0.35%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$1,102,284	$911,627	$744,293	$490,517	$503,088	-15%	-32%	1.97%
9605	Toilet Sets for Personal Travel	NA	$1,711,242	$1,880,827	$2,139,161	$2,622,440	NA	39%	10.29%
9619	Diapers and Fem Hygiene	$12,985,277	$12,273,736	$10,383,225	$11,822,569	$12,743,031	1%	23%	49.99%
	Total Imports	$25,970,554	$24,552,433	$20,774,514	$23,645,138	$25,491,533	1%	23%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 5: Australia's Imports of Personal Care and Cosmetics Products from France

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$1,921,537	$1,391,769	$1,246,528	$1,306,850	$1,259,448	-8%	1%	0.94%
330290	Fragrances & Substances Used as Inputs	$983,114	$1,555,917	$1,607,876	$861,633	$544,286	-11%	-66%	0.41%
3303	Perfumes And Toilet Waters	$27,790,270	$25,534,108	$27,032,137	$35,868,060	$35,815,389	5%	32%	26.67%
3304	Make-Up & Skin-Care Preparations	$73,133,522	$80,234,263	$91,283,556	$84,119,868	$80,702,586	2%	-12%	60.10%
3305	Hair Care Products	$6,829,699	$7,355,859	$6,923,053	$6,338,650	$4,431,860	-8%	-36%	3.30%
3306	Oral & Dental Hygiene	$270,125	$11,894	$536,334	$3,069	$169,138	-9%	-68%	0.13%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$5,760,562	$5,378,586	$5,841,255	$7,188,799	$4,590,496	-4%	-21%	3.42%
3401	Soap & Other Products to Wash the Skin	$2,532,782	$7,600,213	$3,780,181	$3,943,531	$2,967,113	3%	-22%	2.21%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$2,587,392	$2,112,854	$2,803,202	$1,967,022	$1,165,747	-15%	-58%	0.87%
4818	Personal Care Wipes, Diapers, Tampons	$3,980,948	$2,104,549	$827,883	$536,356	$1,943,033	-13%	135%	1.45%
5601	Sanitary Towels and Napkins	$1,046,124	$240,495	$41,995	$43,637	$7,421	-63%	-82%	0.01%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$239,125	$488,510	$489,587	$617,225	$508,937	16%	4%	0.38%
9605	Toilet Sets for Personal Travel	$18,906	$0	$61	NA	$9,107	NA	14830%	0.01%
9619	Diapers and Fem Hygiene	$0	$996,102	$446,032	$421,380	$164,737	NA	-63%	0.12%
	Total Imports	$127,094,106	$135,005,119	$142,859,680	$143,216,080	$134,279,298	1%	-6%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 6: Australia's Imports of Personal Care and Cosmetics Products from Thailand

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$33,198	$42,094	$157,671	$119,527	$17,366	-12%	-89%	0.01%
330290	Fragrances & Substances Used as Inputs	$10,547,342	$11,914,990	$11,606,343	$11,422,623	$11,619,299	2%	0%	5.39%
3303	Perfumes And Toilet Waters	$8,801	$52,717	$1,284	$5,881	$27	-69%	-98%	0.00%
3304	Make-Up & Skin-Care Preparations	$22,080,633	$23,625,784	$23,872,871	$21,353,237	$23,127,315	1%	-3%	10.74%
3305	Hair Care Products	$46,597,504	$46,787,190	$57,980,381	$47,482,237	$43,060,064	-2%	-26%	19.99%
3306	Oral & Dental Hygiene	$26,373,847	$32,053,116	$31,640,054	$36,692,123	$38,289,359	8%	21%	17.78%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$9,601,062	$10,654,364	$12,381,582	$15,816,982	$10,756,926	2%	-13%	4.99%
3401	Soap & Other Products to Wash the Skin	$28,208,273	$27,992,418	$24,936,898	$26,317,232	$23,294,645	-4%	-7%	10.82%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$4,378,612	$2,888,502	$2,593,077	$3,253,401	$3,520,778	-4%	36%	1.63%
4818	Personal Care Wipes, Diapers, Tampons	$35,263,141	$7,679,506	$8,261,868	$7,303,463	$8,180,372	-25%	-1%	3.80%
5601	Sanitary Towels and Napkins	$2,557,244	$2,099,185	$2,182,497	$3,315,369	$1,412,990	-11%	-35%	0.66%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$2,026,136	$1,437,833	$1,078,969	$893,729	$986,656	-13%	-9%	0.46%
9605	Toilet Sets for Personal Travel	$77,990	$63,974	$23,225	$15,357	$27,411	-19%	18%	0.01%
9619	Diapers and Fem Hygiene	NA	$48,759,200	$67,131,014	$61,752,751	$51,094,095	NA	-24%	23.72%
	Total Imports	$187,753,783	$216,050,873	$243,847,734	$235,743,912	$215,387,303	3%	-12%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 7: Australia's Imports of Personal Care and Cosmetics Products from South Korea

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$366	NA	$3,152	$1,366	$488	NA	-85%	0.00%
330290	Fragrances & Substances Used as Inputs	NA	$7,738	$664	NA	$204,568	127%	30708%	0.44%
3303	Perfumes And Toilet Waters	NA	NA	$2,017	$18,529	$16,293	NA	708%	0.04%
3304	Make-Up & Skin-Care Preparations	$7,392,585	$9,799,345	$11,920,531	$15,112,060	$14,856,070	15%	25%	32.14%
3305	Hair Care Products	$677,026	$1,144,617	$1,169,621	$1,284,775	$1,796,815	22%	54%	3.89%
3306	Oral & Dental Hygiene	$93,401	$71,876	$60,909	$195,352	$198,835	16%	226%	0.43%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$743,713	$1,213,941	$2,351,946	$13,307,933	$11,982,377	74%	409%	25.92%
3401	Soap & Other Products to Wash the Skin	$708,430	$221,094	$140,222	$251,765	$392,203	-11%	180%	0.85%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$110,736	$70,669	$277,448	$155,329	$154,616	7%	-44%	0.33%
4818	Personal Care Wipes, Diapers, Tampons	$17,662,721	$512,243	$1,092,359	$1,921,743	$6,483,574	-18%	494%	14.03%
5601	Sanitary Towels and Napkins	$11,572	$1,636	$666	$123,551	$175,844	72%	26303%	0.38%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$848,128	$779,986	$999,653	$1,155,640	$408,026	-14%	-59%	0.88%
9605	Toilet Sets for Personal Travel	NA	NA	$1,113	$2,065	$2,762	NA	148%	0.01%
9619	Diapers and Fem Hygiene	NA	$15,675,624	$10,297,790	$10,497,939	$9,546,923	NA	-7%	20.66%
	Total Imports	$28,248,678	$29,498,769	$28,318,091	$44,028,047	$46,219,394	10%	63%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 8: Australia's Imports of Personal Care and Cosmetics Products from United Kingdom

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$3,403,031	$4,396,493	$5,995,190	$4,466,169	$2,198,816	-16%	-63%	1.89%
330290	Fragrances & Substances Used as Inputs	$4,542,607	$2,870,882	$2,244,132	$1,420,097	$2,750,602	-1%	23%	2.36%
3303	Perfumes And Toilet Waters	$15,819,386	$22,177,450	$17,657,506	$15,316,839	$11,282,509	-7%	-36%	9.68%
3304	Make-Up & Skin-Care Preparations	$45,970,519	$47,904,353	$48,841,903	$44,862,667	$48,670,915	1%	0%	41.75%
3305	Hair Care Products	$12,213,229	$13,053,363	$9,680,306	$12,054,592	$13,422,774	2%	39%	11.51%
3306	Oral & Dental Hygiene	$2,584,258	$5,331,922	$7,538,642	$8,693,707	$7,957,571	25%	6%	6.83%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$16,644,592	$12,604,105	$15,859,871	$11,727,398	$8,814,010	-12%	-44%	7.56%
3401	Soap & Other Products to Wash the Skin	$25,062,649	$25,810,832	$22,168,642	$22,076,798	$16,450,740	-8%	-26%	14.11%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$1,598,196	$1,596,064	$588,056	$656,852	$178,752	-35%	-70%	0.15%
4818	Personal Care Wipes, Diapers, Tampons	$6,944,655	$5,287,044	$4,262,295	$4,924,820	$3,909,174	-11%	-8%	3.35%
5601	Sanitary Towels and Napkins	$1,070,785	$683,602	$912,298	$955,851	$623,957	-10%	-32%	0.54%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$2,305,156	$2,540,513	$3,527,251	$3,847,817	$2,631,068	3%	-25%	2.26%
9605	Toilet Sets for Personal Travel	$47,663	$164,370	$123,728	$186,176	$79,703	11%	-36%	0.07%
9619	Diapers and Fem Hygiene	NA	$790,202	$779,589	$580,723	$354,831	NA	-54%	0.30%
	Total Imports	$133,664,119	$142,340,313	$137,935,277	$130,350,409	$116,574,820	-3%	-15%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 9: Australia's Imports of Personal Care and Cosmetics Products from EU 28

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$8,161,332	$9,039,432	$11,305,618	$10,355,448	$7,365,820	NA	-35%	1.16%
330290	Fragrances & Substances Used as Inputs	$7,952,513	$6,219,558	$5,021,495	$3,936,001	$4,910,013	-6%	-2%	0.78%
3303	Perfumes And Toilet Waters	$94,232,862	$104,367,802	$107,427,469	$111,440,766	$102,182,885	2%	-5%	16.14%
3304	Make-Up & Skin-Care Preparations	$190,512,059	$182,260,766	$204,159,334	$204,901,025	$198,998,964	1%	-3%	31.43%
3305	Hair Care Products	$80,821,882	$72,196,858	$84,042,222	$88,053,224	$78,751,875	-1%	-6%	12.44%
3306	Oral & Dental Hygiene	$13,162,360	$18,418,312	$18,751,882	$18,306,118	$43,250,353	27%	131%	6.83%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$49,480,226	$45,311,572	$45,862,578	$40,342,855	$34,302,558	-7%	-25%	5.42%
3401	Soap & Other Products to Wash the Skin	$39,719,289	$41,034,176	$36,728,481	$39,403,435	$34,050,690	-3%	-7%	5.38%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$5,553,595	$5,788,516	$5,649,323	$4,890,114	$2,016,218	-18%	-64%	0.32%
4818	Personal Care Wipes, Diapers, Tampons	$102,986,712	$19,793,446	$19,010,803	$21,890,665	$20,523,778	-28%	8%	3.24%
5601	Sanitary Towels and Napkins	$18,812,564	$3,098,954	$4,668,135	$2,972,141	$3,840,630	-27%	-18%	0.61%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$16,720,696	$18,441,538	$17,075,294	$18,734,210	$18,909,621	2%	11%	2.99%
9605	Toilet Sets for Personal Travel	$141,590	$169,366	$131,670	$207,207	$103,272	-6%	-22%	0.02%
9619	Diapers and Fem Hygiene	NA	$87,200,300	$92,314,548	$96,574,762	$83,990,104	NA	-9%	13.26%
	Total Imports	$628,257,680	$613,340,596	$652,148,852	$662,007,971	$633,196,781	0%	-3%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 10: Imported Products Share of Australia's Personal Care and Cosmetics Market

Importer	2011	% Market Share	2012	% Market Share	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	$457,506,495	22%	$508,939,575	22%	$518,901,347	21%	$519,536,794	22%	$539,013,532	22%
France	$127,094,106	6%	$135,005,119	6%	$142,859,680	6%	$143,216,080	6%	$134,279,298	5%
Japan	$25,970,554	1%	$24,552,433	1%	$20,774,514	1%	$23,645,138	1%	$25,491,533	1%
South Korea	$28,248,678	1%	$29,498,769	1%	$44,028,047	2%	$44,028,047	2%	$46,219,394	2%
Thailand	$187,753,783	9%	$261,377,267	11%	$243,847,734	10%	$312,785,450	13%	$214,817,043	9%
China	$279,377,433	13%	$327,822,216	14%	$337,329,390	14%	$390,728,512	16%	$462,600,995	19%
United Kingdom	$133,664,119	6%	$142,340,313	6%	$137,935,277	6%	$130,350,409	5%	$116,574,820	5%
EU28 (excludes France & UK)	$367,499,455	18%	$335,995,164	14%	$371,353,895	15%	$388,441,482	16%	$382,342,663	15%
Other Imports	$491,935,889	23%	$582,214,681	25%	$665,374,400	27%	$457,159,003	19%	$561,065,006	23%
Total AUS Imports	$2,099,050,512	100%	$2,347,745,537	100%	$2,482,404,284	100%	$2,409,890,915	100%	$2,482,404,284	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 11: HS 34: Make Up Products, US Exports to Australia

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to Aus
3304	Make-Up & Skin-Care Preparations	$183,110,143	$190,542,408	$194,369,816	$215,540,086	$239,410,396	23%	6%	44.42%
330410	Lipstick, other prep	$16,008,222	$18,837,626	$21,897,816	$19,728,661	$23,249,013	6%	8%	4.31%
330420	Eye Make-Up	$15,923,005	$14,336,503	$14,794,066	$16,792,382	$19,981,260	35%	5%	3.71%
330430	Manicure & Pedicure Preparations	$16,209,278	$20,687,692	$24,487,242	$31,030,008	$53,287,286	118%	27%	9.89%
330491	Powder Make-Up Or Skin Care Preparations	$25,563,821	$18,223,087	$19,166,636	$15,575,986	$18,732,568	-2%	-6%	3.48%
330499	Beauty & Skin Care Prep	$109,405,817	$118,457,500	$114,024,056	$132,408,927	$124,135,442	9%	3%	23.03%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 12: HS 35: Hair Care Products, US Exports to Australia

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to Aus
3305	Hair Care Products	$51,904,985	$46,646,517	$46,279,339	$52,612,891	$54,215,004	17%	1%	10.06%
330510	Shampoo	$15,977,185	$15,083,079	$16,588,638	$17,075,991	$15,770,682	-5%	0%	2.93%
330520	Prep for Waiving and Straightening Hair	$1,864,879	$810,333	$1,060,160	$3,604,965	$918,811	-13%	-13%	0.17%
330530	Hair Lacquer	$2,128,836	$1,864,879	$1,416,751	$1,083,927	$1,481,161	5%	-7%	0.27%
330590	Other Hair Products, inc. Color	$31,934,085	$28,888,226	$27,213,790	$30,848,008	$36,044,350	32%	2%	6.69%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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HS 37: Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants, US Exports to Australia

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to Aus
3307	Cosmetic & Toilet Prep	$15,541,259	$15,398,955	$15,522,137	$27,158,533	$21,571,295	39%	7%	4.00%
330710	Shaving Preparations	$868,720	$999,171	$1,341,419	$1,834,972	$1,961,574	46%	18%	0.36%
330720	Personal Deodorants and Antiperspirants	$1,617,943	$2,403,556	$3,760,320	$4,227,127	$4,265,934	13%	21%	0.79%
330730	Perfumed Bath Salts And Other Bath	$1,060,209	$719,935	$1,197,299	$880,033	$975,744	-19%	-2%	0.18%
330790	Depilatories, Other Perfumery	$11,994,387	$11,276,293	$9,223,099	$20,216,401	$14,368,043	56%	4%	2.67%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 1:China Total Personal Care and Cosmetics Imports

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Imports
3301	Essential Oils	$163,288,855	$210,298,571	$263,383,748	$221,044,758	$228,673,312	7%	-13%	4%
330290	Fragrances & Substances Used as Inputs	$168,150,742	$197,614,942	$192,272,334	$172,452,171	$175,853,562	1%	-9%	3%
3303	Perfumes And Toilet Waters	$76,906,450	$89,641,491	$97,049,360	$117,347,009	$186,387,635	19%	92%	3%
3304	Make-Up & Skin-Care Preparations	$1,071,837,865	$1,148,764,527	$1,296,903,041	$1,670,116,043	$3,067,662,395	23%	137%	50%
3305	Hair Care Products	$87,572,669	$107,406,437	$107,096,915	$128,722,905	$237,774,676	22%	122%	4%
3306	Oral & Dental Hygiene	$43,265,579	$51,673,896	$48,994,326	$52,198,063	$108,480,233	20%	121%	2%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$110,526,323	$126,130,170	$136,303,298	$166,651,339	$247,475,776	17%	82%	4%
3401	Soap & Other Products to Wash the Skin	$99,121,957	$103,765,427	$109,058,289	$124,111,915	$178,574,966	12%	64%	3%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$46,800,244	$46,940,222	$42,628,602	$46,399,600	$34,131,856	-6%	-20%	1%
4818	Personal Care Wipes, Diapers, Tampons	$208,542,441	$26,310,316	$32,397,060	$38,758,951	$34,100,876	-30%	5%	1%
5601	Sanitary Towels and Napkins	$118,295,477	$114,931,993	$131,244,304	$138,224,133	$113,688,550	-1%	-13%	2%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$98,445,838	$103,722,303	$117,274,719	$137,639,328	$143,999,956	8%	23%	2%
9605	Toilet Sets for Personal Travel	$1,307,092	$1,396,345	$1,494,111	$2,710,263	$3,151,474	19%	111%	0%
9619	Diapers and Fem Hygiene	$0	$303,667,388	$492,030,372	$751,767,447	$1,357,243,408	45%	176%	22%
	Total Imports	$2,294,061,532	$2,632,264,028	$3,068,130,479	$3,768,143,925	$6,117,198,675	22%	99%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 2: China Imports of Personal Care and Cosmetics Products from the U.S.

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$38,596,338	$40,849,684	$55,411,460	$52,842,550	$66,038,187	11%	19%	17%
330290	Fragrances & Substances Used as Inputs	$9,215,227	$7,915,182	$11,391,483	$11,539,474	$13,077,707	7%	15%	3%
3303	Perfumes And Toilet Waters	$5,769,003	$5,307,876	$6,784,029	$7,021,767	$4,770,828	-4%	-30%	1%
3304	Make-Up & Skin-Care Preparations	$92,891,966	$90,546,018	$146,991,927	$154,537,875	$163,076,710	12%	11%	42%
3305	Hair Care Products	$2,483,322	$3,163,758	$3,558,249	$3,963,024	$10,232,733	33%	188%	3%
3306	Oral & Dental Hygiene	$7,861,204	$7,076,410	$9,429,829	$9,498,957	$12,907,106	10%	37%	3%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$27,123,724	$27,391,342	$34,296,191	$40,588,151	$66,202,198	20%	93%	17%
3401	Soap & Other Products to Wash the Skin	$12,659,088	$12,154,392	$17,349,230	$13,901,782	$16,732,889	6%	-4%	4%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$4,753,466	$5,818,200	$7,628,852	$8,010,398	$8,010,398	11%	5%	2%
4818	Personal Care Wipes, Diapers, Tampons	$10,063,136	$5,613,437	$4,242,579	$7,143,310	$5,165,645	-12%	22%	1%
5601	Sanitary Towels and Napkins	$5,216,657	$2,761,666	$7,792,606	$9,408,884	$9,580,124	13%	23%	2%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$5,841,850	$9,434,941	$11,367,562	$11,484,511	$11,814,060	15%	4%	3%
9605	Toilet Sets for Personal Travel	$118,430	$25,000	$92,251	$4,758,327	$1,253,609	60%	1259%	0%
9619	Diapers and Fem Hygiene	NA	$7,074,544	$7,846,968	$1,879,259	$3,743,813	-15%	-52%	1%
	Total Imports	$222,593,411	$225,132,450	$324,183,216	$336,578,269	$392,606,007	15%	21%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 3: China's Imports of Personal Care and Cosmetics Products from Brazil

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$16,929,928	$12,453,417	$15,066,989	$9,633,538	$16,524,612	-0.48%	9.67%	49.00%
330290	Fragrances & Substances Used as Inputs	$29,715	$75,004	$60,094	$28,750	$111,708	30.32%	85.89%	0.33%
3303	Perfumes And Toilet Waters	NA	NA	NA	NA	$282	NA	NA	0.00%
3304	Make-Up & Skin-Care Preparations	$263	$211	$598	$40,062	$121,644	241.21%	20241.81%	0.36%
3305	Hair Care Products	NA	$1,430	$24,421	$37,395	$144,666	NA	492.38%	0.43%
3306	Oral & Dental Hygiene	$114,775	$6,336	$3,969	NA	NA	NA	NA	NA
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	NA	NA	$23,000	$11,337	$1,342	NA	-94.17%	0.00%
3401	Soap & Other Products to Wash the Skin	$1,935	$698	$44,422	$120,565	$715	-18.05%	-98.39%	0.00%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	NA	$19,006	NA	NA	$3,415	NA	NA	0.01%
4818	Personal Care Wipes, Diapers, Tampons	$69	$6	NA	$31,680	NA	NA	NA	NA
5601	Sanitary Towels and Napkins	$15,770	$39,341	$25,341	$19,740	$7,601	-13.58%	-70.01%	0.02%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	NA	NA	NA	$8	NA	NA	NA	NA
9605	Toilet Sets for Personal Travel	$17,062,740	$12,520,445	$15,188,740	$9,894,325	$16,804,277	NA	NA	49.83%
9619	Diapers and Fem Hygiene	NA	NA	NA	NA	NA	NA	NA	NA
	Total Imports	$34,155,195	$25,115,894	$30,437,574	$19,817,400	$33,720,262	-0.26%	10.78%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 4: China's Imports of Personal Care and Cosmetics Products from Japan

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$2,292,982	$4,087,499	$4,852,323	$8,106,381	$3,801,514	11%	-22%	0%
330290	Fragrances & Substances Used as Inputs	$5,705,554	$5,895,368	$5,169,413	$4,426,180	$3,444,510	-10%	-33%	0%
3303	Perfumes And Toilet Waters	$54,380	$72,900	$9,325	$36,875	$33,973	-9%	264%	0%
3304	Make-Up & Skin-Care Preparations	$238,449,889	$210,009,411	$170,632,780	$169,249,250	$221,944,314	-1%	30%	15%
3305	Hair Care Products	$27,042,407	$30,685,277	$17,213,443	$27,553,862	$54,248,235	15%	215%	4%
3306	Oral & Dental Hygiene	$5,262,782	$5,573,039	$4,155,083	$8,662,404	$17,351,483	27%	318%	1%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$8,906,360	$19,977,649	$18,406,857	$18,321,148	$28,417,822	26%	54%	2%
3401	Soap & Other Products to Wash the Skin	$29,633,948	$33,952,766	$37,724,182	$50,475,054	$65,273,130	17%	73%	4%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$6,333,468	$10,135,419	$7,768,618	$9,303,867	$9,991,713	10%	29%	1%
4818	Personal Care Wipes, Diapers, Tampons	$87,186,065	$5,713,113	$7,621,893	$7,806,868	$7,702,560	-38%	1%	1%
5601	Sanitary Towels and Napkins	$24,369,509	$16,938,906	$13,198,886	$17,198,819	$12,935,119	-12%	-2%	1%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$22,738,450	$22,891,113	$18,736,233	$20,399,099	$20,289,649	-2%	8%	1%
9605	Toilet Sets for Personal Travel	$15,698	$0	$2,101	$4,986	$18,958	4%	802%	0%
9619	Diapers and Fem Hygiene	$0	$148,982,357	$296,567,396	$560,285,749	$1,073,110,745	64%	262%	71%
	Total Imports	$457,991,492	$514,914,817	$602,058,533	$901,830,542	$1,518,563,725	31%	152%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 5: China's Imports of Personal Care and Cosmetics Products from France

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$7,541,475	$6,406,793	$6,693,584	$6,791,657	$7,158,588	-1%	7%	1%
330290	Fragrances & Substances Used as Inputs	$10,337,135	$9,258,225	$9,943,263	$11,090,916	$9,696,954	-1%	-2%	2%
3303	Perfumes And Toilet Waters	$21,648,010	$26,937,597	$32,722,227	$23,373,224	$17,396,261	-4%	-47%	3%
3304	Make-Up & Skin-Care Preparations	$345,148,453	$325,398,800	$406,977,424	$493,596,170	$435,611,724	5%	7%	86%
3305	Hair Care Products	$3,561,041	$4,854,552	$5,638,209	$8,224,436	$16,649,521	36%	195%	3%
3306	Oral & Dental Hygiene	$195,853	$383,402	$434,137	$2,324,336	$1,753,396	55%	304%	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$15,192,477	$18,394,339	$12,173,100	$6,078,095	$7,507,156	-13%	-38%	1%
3401	Soap & Other Products to Wash the Skin	$3,909,762	$4,507,666	$3,731,491	$4,261,771	$10,701,344	22%	187%	2%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$2,658,371	$3,349,337	$800,801	$356,681	$286,231	-36%	-64%	0%
4818	Personal Care Wipes, Diapers, Tampons	$618,250	$490,477	$574,608	$144,505	$91,708	-32%	-84%	0%
5601	Sanitary Towels and Napkins	$541,962	$352,032	$260,766	$285,862	$372,688	-7%	43%	0%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$454,836	$734,542	$1,803,621	$1,190,861	$1,809,097	32%	0%	0%
9605	Toilet Sets for Personal Travel	$18,717	$115,442	$48,084	$34,087	$21,884	3%	-54%	0%
9619	Diapers and Fem Hygiene	$0	$1,798	$111,420	$68,050	$198,650	224%	78%	0%
	Total Imports	$411,826,342	$401,185,002	$481,912,735	$557,820,651	$509,255,202	4%	6%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 6: China's Imports of Personal Care and Cosmetics Products from Thailand

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$91,582	$85,002	$38,663	$37,934	$103,195	2%	167%	0%
330290	Fragrances & Substances Used as Inputs	$8,535	$16,818	$26,649	$11,642	$210,491	90%	690%	1%
3303	Perfumes And Toilet Waters	$81,105	$83,746	$67,546	$72,634	$87,314	1%	29%	0%
3304	Make-Up & Skin-Care Preparations	$5,285,153	$4,902,868	$3,489,486	$2,545,168	$4,033,706	-5%	16%	11%
3305	Hair Care Products	$3,251,375	$4,617,712	$14,687,349	$8,111,630	$3,370,055	1%	-77%	9%
3306	Oral & Dental Hygiene	$13,218,126	$7,029,592	$8,316,656	$6,520,032	$6,948,063	-12%	-16%	18%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$1,099,829	$2,294,060	$3,109,488	$2,085,699	$3,828,485	28%	23%	10%
3401	Soap & Other Products to Wash the Skin	$283,934	$593,293	$1,787,623	$1,029,731	$863,949	25%	-52%	2%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$1,329,384	$587,682	$171,970	$231,507	$95,088	-41%	-45%	0%
4818	Personal Care Wipes, Diapers, Tampons	$2,830,686	$958,943	$887,037	$1,041,726	$537,523	-28%	-39%	1%
5601	Sanitary Towels and Napkins	$14,482,044	$21,009,983	$32,519,982	$32,615,300	$14,135,165	0%	-57%	37%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$148,342	$307,355	$578,164	$695,704	$852,983	42%	48%	2%
9605	Toilet Sets for Personal Travel	$33,324	$34,835	$22,227	$23,660	$18,024	-12%	-19%	0%
9619	Diapers and Fem Hygiene	$0	$2,894,787	$5,132,504	$6,639,236	$3,098,048	NA	NA	8%
	Total Imports	$42,143,419	$45,416,676	$70,835,344	$61,661,603	$38,182,089	-2%	-46%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 7: China's Imports of Personal Care and Cosmetics Products from South Korea

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$3,815,814	$3,491,991	$5,918,942	$6,571,598	$5,135,650	6%	-13%	0%
330290	Fragrances & Substances Used as Inputs	$26,951	$8,781	$134,296	$367,274	$3,511,379	165%	2515%	0%
3303	Perfumes And Toilet Waters	$26,951	$8,781	$134,296	$367,274	$2,226,064	142%	1558%	0%
3304	Make-Up & Skin-Care Preparations	$184,275,651	$191,613,286	$261,246,825	$511,662,366	$992,875,715	40%	280%	79%
3305	Hair Care Products	$14,820,469	$16,456,785	$27,533,098	$41,780,500	$83,575,158	41%	204%	7%
3306	Oral & Dental Hygiene	$6,315,756	$9,211,946	$7,453,355	$10,662,966	$24,405,797	31%	227%	2%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$4,925,430	$6,956,901	$9,173,587	$21,122,265	$72,584,177	71%	691%	6%
3401	Soap & Other Products to Wash the Skin	$13,910,283	$21,695,131	$20,209,075	$31,688,719	$31,485,612	18%	56%	2%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$2,157,016	$429,752	$1,041,518	$1,962,243	$3,811,104	12%	266%	0%
4818	Personal Care Wipes, Diapers, Tampons	$91,659,902	$1,579,971	$3,461,274	$7,109,597	$12,469,000	-33%	260%	1%
5601	Sanitary Towels and Napkins	$8,551,421	$11,072,000	$12,155,567	$11,896,871	$11,692,241	6%	-4%	1%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$4,664,408	$7,818,136	$8,094,553	$11,091,008	$16,110,702	28%	99%	1%
9605	Toilet Sets for Personal Travel	$1,873	$11,791	$77,282	$139,511	$151,019	141%	95%	0%
9619	Diapers and Fem Hygiene	$0	$144,916,212	$151,265,391	$130,632,853	$163,356,306	3%	8%	13%
	Total Imports	$335,151,925	$270,355,252	$356,633,668	$656,422,192	$1,260,033,618	30%	253%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 8: China's Imports of Personal Care and Cosmetics Products from the EU 28

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$119,279,991	$113,184,423	$121,815,049	$112,958,130	$116,926,866	0%	-4%	4%
330290	Fragrances & Substances Used as Inputs	$19,597,437	$20,192,319	$28,603,267	$23,760,091	$27,125,951	7%	-5%	1%
3303	Perfumes And Toilet Waters	$92,773,525	$84,645,923	$77,154,032	$83,054,693	$78,198,676	-3%	1%	3%
3304	Make-Up & Skin-Care Preparations	$424,323,523	$474,978,707	$484,029,001	$528,646,221	$501,360,903	3%	4%	19%
3305	Hair Care Products	$23,758,969	$26,179,557	$32,109,905	$44,813,368	$38,466,113	10%	20%	1%
3306	Oral & Dental Hygiene	$26,608,448	$30,176,237	$44,953,865	$54,222,503	$54,838,051	16%	22%	2%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$183,658,168	$172,254,538	$189,951,244	$185,572,655	$196,372,239	1%	3%	7%
3401	Soap & Other Products to Wash the Skin	$112,166,817	$115,350,436	$110,208,880	$120,647,359	$122,363,170	2%	11%	5%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$24,199,586	$21,057,687	$44,246,708	$59,903,169	$40,175,367	11%	-9%	2%
4818	Personal Care Wipes, Diapers, Tampons	$209,808,913	$163,357,168	$168,202,028	$194,300,972	$194,243,082	-2%	15%	7%
5601	Sanitary Towels and Napkins	$33,304,999	$27,331,950	$21,868,683	$22,814,169	$24,783,494	-6%	13%	1%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$948,839,395	$921,606,466	$1,000,493,927	$1,129,643,444	$1,122,112,567	3%	12%	43%
9605	Toilet Sets for Personal Travel	$54,430,277	$46,500,828	$48,486,294	$48,978,620	$50,948,542	-1%	5%	2%
9619	Diapers and Fem Hygiene	$0	$35,916,892	$34,810,072	$48,964,643	$52,020,897	NA	NA	2%
	Total Imports	$2,272,750,048	$2,252,733,131	$2,406,932,955	$2,658,280,037	$2,619,935,918	3%	9%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 9: Imported Products Share of China's Personal Care and Cosmetics Market

Top 7 Importers to China	2011	% Market Share	2012	% Market Share	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	$222,593,411	7%	$225,132,450	6%	$324,183,216	8%	$336,578,269	11%	$392,606,007	9%
France	$411,826,342	12%	$401,185,002	12%	$481,912,735	12%	$557,820,651	18%	$509,255,202	12%
Japan	$457,991,492	14%	$514,914,817	15%	$602,058,533	15%	$901,830,542	29%	$1,518,563,725	36%
South Korea	$335,151,925	10%	$270,355,252	8%	$356,633,668	9%	$656,422,192	21%	$1,260,033,618	30%
Thailand	$42,143,419	1%	$45,416,676	1%	$70,835,344	2%	$61,661,603	2%	$38,182,089	1%
Brazil	$34,155,195	1%	$25,115,894	1%	$30,437,574	1%	$19,817,400	1%	$33,720,262	1%
EU 28 (Excluding France)	$1,860,923,706	55%	$2,005,747,953	58%	$2,138,023,183	53%	$557,820,651	18%	$509,255,202	12%
Total Chinese Imports Reported by Exporters	$3,364,785,490	100%	$3,487,868,044	100%	$4,004,084,253	100%	$3,091,951,308	100%	$4,261,616,105	100%
Total Imports Reported by China (1)	$2,294,061,532	NA	$2,632,264,028	NA	$3,068,130,479	NA	$3,768,143,925	NA	$6,117,198,675	NA

1. Note that China's total reported cosmetics and personal care imports are lower than what countries report exporting to China. This may be due in part to China, not tracking all imports that come in via Macao, Hong Kong and other channels.

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 10: HS 34: Make Up Products, US Exports to China

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to Aus
3304	Make-Up & Skin-Care Preparations	$92,891,966	$90,546,018	$146,991,927	$154,537,875	$163,076,710	11%	12%	42%
330410	Lipstick, other prep	$4,739,488	$4,009,064	$8,572,168	$10,085,742	$13,893,666	62%	24%	4%
330420	Eye Make-Up	$5,871,122	$6,448,730	$5,809,250	$8,267,263	$6,526,831	12%	2%	2%
330430	Manicure & Pedicure Preparations	$2,953,525	$1,680,151	$1,763,308	$2,384,118	$3,188,796	81%	2%	1%
330491	Powder Make-Up Or Skin Care Preparations	$8,359,758	$9,672,379	$14,466,510	$10,515,918	$6,925,070	-52%	-4%	2%
330499	Beauty & Skin Care Prep	$70,968,073	$68,735,694	$116,380,691	$123,284,834	$132,542,347	14%	13%	34%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 11: HS 35: Hair Care Products, US Exports to China

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to Aus
3305	Hair Care Products	$2,483,322	$3,163,758	$3,558,249	$3,963,024	$10,232,733	188%	32.7%	2.61%
330510	Shampoo	$1,194,073	$1,698,434	$2,300,399	$2,335,987	$7,902,011	244%	45.9%	2.01%
330520	Prep for Waiving and Straightening Hair	$11,422	$50,088	$35,157	$191,656	$11,151	-68%	-0.5%	0.00%
330530	Hair Lacquer	$8,961	$142,571	$9,696	$30,530	$69,856	620%	50.8%	0.02%
330590	Other Hair Products, inc. Color	$1,268,866	$1,272,665	$1,212,997	$1,404,851	$2,249,715	85%	12.1%	0.57%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 12: HS 37: Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants, US Exports to China

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to Aus
3307	Cosmetic & Toilet Prep	$27,123,724	$27,391,342	$34,296,191	$40,588,151	$66,202,198	10%	20%	16.86%
330710	Shaving Preparations	$856,667	$1,402,104	$1,386,880	$2,271,685	$1,864,701	38%	17%	0.47%
330720	Personal Deodorants and Antiperspirants	$844,992	$493,799	$297,932	$165,569	$538,725	-184%	-9%	0.14%
330730	Perfumed Bath Salts And Other Bath	$7,757,553	$2,770,086	$245,311	$240,903	$951,378	-3062%	-34%	0.24%
330790	Depilatories, Other Perfumery	$17,664,512	$22,725,353	$32,366,068	$37,909,994	$62,847,394	10%	29%	16.01%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

HONG KONG'S IMPORTS FROM THE U.S. BY PRODUCT, 2012-2015

Appendix Table 4

SITC CODE	PRODUCTS	2012			2013			2014			JAN - DEC 2015		
		VALUE	%SHR	%CHG	VALUE	%SHR	%CHG	VALUE	%SHR	%CHG	VALUE	%SHR	%CHG
	TOTAL	486,494	100	18.6	528,831	100	8.7	521,959	100	-1.3	516,669	100	-1
55320	BEAUTY OR MAKE-UP PREPARATIONS FOR SKIN CARE	311,208	64	14.6	347,570	65.7	11.7	341,865	65.5	-1.6	347,665	67.3	1.7
55310	PERFUMES AND TOILET WATERS	47,543	9.8	-6.6	58,309	11	22.6	49,055	9.4	-15.9	43,703	8.5	-10.9
55330	PREPARATIONS FOR USE ON THE HAIR	21,611	4.4	9.4	27,905	5.3	29.1	23,267	4.5	-16.6	26,916	5.2	15.7
69635	SAFETY RAZOR BLADES	35,688	7.3	295.8	22,212	4.2	-37.8	26,900	5.2	21.1	25,039	4.8	-6.9
551	ESSENTIAL OILS, PERFUME AND FLAVOUR MATERIALS	21,321	4.4	6.7	26,407	5	23.9	30,648	5.9	16.1	24,466	4.7	-20.2
55353	PERFUMED BATH SALTS AND OTHER BATH PREPARATIONS	6,121	1.3	7	7,415	1.4	21.1	8,856	1.7	19.4	11,969	2.3	35.2
55340	PREPARATIONS FOR ORAL OR DENTAL HYGIENE	3,252	0.7	15.3	3,724	0.7	14.5	4,954	0.9	33	5,307	1	7.1
64294	PAPER HANDKERCHIEFS, TOWELS, TISSUES, TABLECLOTHS ETC	9,041	1.9	17.6	7,640	1.4	-15.5	7,909	1.5	3.5	5,161	1	-34.8
65771	WADDING OF TEXTILE MATERIALS/ARTICLES; TEXTILE FIBRES <5MM	2,653	0.5	4.4	664	0.1	-75	4,690	0.9	606.7	3,966	0.8	-15.4
89972	BROOMS/BRUSHES/SWEEPERS/MOPS/FEATHER DUSTERS/PAINTPADS, ETC	2,507	0.5	71.1	2,550	0.5	1.7	2,771	0.5	8.7	2,934	0.6	5.9
64295	SANITARY TOWELS & TAMPONS, NAPKINS & LINERS, OFPAPER, ETC	1,292	0.3	149	1,354	0.3	4.8	1,885	0.4	39.2	2,697	0.5	43.1
55351	PRE-SHAVE, SHAVING OR AFTER-SHAVE PREPARATIONS	3,326	0.7	23.1	2,968	0.6	-10.8	2,835	0.5	-4.5	2,597	0.5	-8.4
87231	MECHANO-THERAPY APPLIANCES/MASSAGE APPARATUS, ETC	6,684	1.4	92.6	6,174	1.2	-7.6	2,198	0.4	-64.4	2,364	0.5	7.6
71610	ELECTRIC MOTORS OF AN OUTPUT NOT EXCEEDING 37.5 W	1,828	0.4	45.9	1,335	0.3	-27	4,961	1	271.5	2,346	0.5	-52.7
71631	AC MOTORS	3,540	0.7	7.4	4,476	0.8	26.4	2,739	0.5	-38.8	2,312	0.4	-15.6
55419	SOAP IN LIQUID FORM	1,104	0.2	-26.1	1,220	0.2	10.5	2,113	0.4	73.2	1,953	0.4	-7.6
55411	SOAP/ORGANIC SURFACE-ACTIVE PRODUCTS/PREPARATIONS, FOR TOILET	992	0.2	13.9	1,835	0.3	85	1,464	0.3	-20.2	1,319	0.3	-9.9
69523	PLIERS, PINCERS, TWEEZERS, METAL CUTTING SHEARS,ETC	1,056	0.2	-2.6	883	0.2	-16.3	745	0.1	-15.7	933	0.2	25.2
64243	TOILET PAPER, CUT TO SIZE	836	0.2	-23.7	1,013	0.2	21.1	843	0.2	-16.7	903	0.2	7.1
83130	TRAVEL SETS FOR PERSONAL TOILET, SEWING ETC	1,353	0.3	289.8	1,220	0.2	-9.8	40	*	-96.7	656	0.1	..
55352	PERSONAL DEODORANTS AND ANTI-PERSPIRANTS	383	0.1	-30.7	558	0.1	45.6	280	0.1	-49.8	515	0.1	83.7
89987	SCENT SPRAYS/SIMILAR TOILET SPRAYS, & MOUNTS & HEADS THEREFOR	257	0.1	91.4	303	0.1	17.7	146	*	-51.9	173	*	18.4
89989	COMBS, HAIR-SLIDES ETC; HAIRPINS, CURLING GRIPS; & PARTS	107	*	-8.4	137	*	28.1	101	*	-26	164	*	62.3
55415	SOAP/ORGANIC SURFACE-ACTIVE PRODUCTS/PREPARATIONS FOR OTHER USE	459	0.1	-24.2	399	0.1	-13.1	170	*	-57.3	160	*	-5.9
77583	ELECTRO-THERMIC HAIR-DRESSING OR HAND-DRYING APPARATUS	894	0.2	67.5	64	*	-92.9	126	*	97.9	159	*	26.1
64163	PAPER TISSUE FOR HOUSEHOLD OR SANITARY PURPOSES	199	*	-11.7	275	0.1	38.2	219	*	-20.3	157	*	-28.2
89982	POWDER PUFFS/PADS FOR COSMETICS/TOILET PREPARATIONS	1,146	0.2	208.4	172	*	-85	146	*	-15.5	100	*	-31.2
69655	MANICURE OR PEDICURE SETS AND INSTRUMENTS (INCL. NAIL FILES)	94	*	-41.7	49	*	-47.6	32	*	-34.8	34	*	6

* INSIGNIFICANT = INFINITY @ NOT AVAILABLE

..OVER 1000% INCREASE - NIL N.E.S. NOT ELSEWHERE SPECIFIED

SOURCE: HONG KONG TRADE STATISTICS, CENSUS & STATISTICS DEPT.

SOURCE:HONG KONG TRADE DEVELOPMENT COUNCIL

HONG KONG'S IMPORTS FROM CHINA BY PRODUCT, 2012-2015

VALUE: USD (TH)

SITC CODE	PRODUCTS	- 2012 - VALUE	- 2012 - %SHR	- 2012 - %CHG	- 2013 - VALUE	- 2013 - %SHR	- 2013 - %CHG	- 2014 - VALUE	- 2014 - %SHR	- 2014 - %CHG	JAN - DEC 2015 VALUE	JAN - DEC 2015 %SHR	JAN - DEC 2015 %CHG
	TOTAL	2,445,450	100	7.2	2,363,869	100	-3.3	2,248,827	100	-4.9	2,182,654	100	-2.9
71610	ELECTRIC MOTORS OF AN OUTPUT NOT EXCEEDING 37.5 W	1,113,876	45.5	3.3	1,022,782	43.3	-8.2	971,058	43.2	-5.1	940,671	43.1	-3.1
55320	BEAUTY OR MAKE-UP PREPARATIONS FOR SKIN CARE	229,467	9.4	35.1	232,837	9.8	1.5	245,376	10.9	5.4	263,911	12.1	7.6
71631	AC MOTORS	182,000	7.4	-16.9	166,489	7	-8.5	162,628	7.2	-2.3	130,740	6	-19.6
64243	TOILET PAPER, CUT TO SIZE	100,625	4.1	3	102,242	4.3	1.6	107,662	4.8	5.3	113,308	5.2	5.2
77583	ELECTRO-THERMIC HAIR-DRESSING OR HAND-DRYING APPARATUS	178,859	7.3	14.4	171,141	7.2	-4.3	126,114	5.6	-26.3	94,933	4.3	-24.7
55330	PREPARATIONS FOR USE ON THE HAIR	76,605	3.1	20.8	82,119	3.5	7.2	86,496	3.8	5.3	84,068	3.9	-2.8
87231	MECHANO-THERAPY APPLIANCES/MASSAGE APPARATUS, ETC	94,729	3.9	12.9	101,188	4.3	6.8	84,584	3.8	-16.4	83,799	3.8	-0.9
64294	PAPER HANDKERCHIEFS, TOWELS, TISSUES, TABLECLOTHS ETC	79,137	3.2	3.8	77,908	3.3	-1.6	88,619	3.9	13.7	83,755	3.8	-5.5
89972	BROOMS/BRUSHES/SWEEPERS/MOPS/FEATHER DUSTERS/PAINTPADS, ETC	53,898	2.2	-7.1	54,735	2.3	1.6	54,578	2.4	-0.3	55,094	2.5	0.9
64295	SANITARY TOWELS & TAMPONS, NAPKINS & LINERS, OFPAPER, ETC	56,871	2.3	14.1	54,921	2.3	-3.4	56,801	2.5	3.4	54,593	2.5	-3.9
55353	PERFUMED BATH SALTS AND OTHER BATH PREPARATIONS	57,149	2.3	7.2	54,619	2.3	-4.4	59,258	2.6	8.5	51,783	2.4	-12.6
89989	COMBS, HAIR-SLIDES ETC; HAIRPINS, CURLING GRIPS; & PARTS	38,011	1.6	-9.8	49,431	2.1	30	45,551	2	-7.8	48,169	2.2	5.7
551	ESSENTIAL OILS, PERFUME AND FLAVOUR MATERIALS	28,114	1.1	38.3	26,327	1.1	-6.4	24,291	1.1	-7.7	43,010	2	77.1
55340	PREPARATIONS FOR ORAL OR DENTAL HYGIENE	22,567	0.9	15.2	25,744	1.1	14.1	25,126	1.1	-2.4	27,904	1.3	11.1
83130	TRAVEL SETS FOR PERSONAL TOILET, SEWING ETC	16,538	0.7	7.6	18,192	0.8	10	17,429	0.8	-4.2	21,301	1	22.2
65771	WADDING OF TEXTILE MATERIALS/ARTICLES; TEXTILE FIBRES <5MM	11,822	0.5	1.8	12,551	0.5	6.2	11,267	0.5	-10.2	11,749	0.5	4.3
55310	PERFUMES AND TOILET WATERS	17,158	0.7	116.4	15,132	0.6	-11.8	12,787	0.6	-15.5	11,514	0.5	-10
89987	SCENT SPRAYS/SIMILAR TOILET SPRAYS, & MOUNTS & HEADS THEREFOR	11,790	0.5	-11.1	11,301	0.5	-4.1	7,844	0.3	-30.6	10,717	0.5	36.6
69635	SAFETY RAZOR BLADES	33,477	1.4	..	36,822	1.6	10	15,262	0.7	-58.6	10,167	0.5	-33.4
55419	SOAP IN LIQUID FORM	8,159	0.3	-0.2	9,023	0.4	10.6	10,162	0.5	12.6	10,166	0.5	*
55411	SOAP/ORGANIC SURFACE-ACTIVE PRODUCTS/PREPARATIONS, FOR TOILET	8,331	0.3	-11.5	9,704	0.4	16.5	8,621	0.4	-11.2	7,466	0.3	-13.4
69523	PLIERS, PINCERS, TWEEZERS, METAL CUTTING SHEARS,ETC	6,301	0.3	-25	5,810	0.2	-7.8	5,023	0.2	-13.5	6,808	0.3	35.5
55351	PRE-SHAVE, SHAVING OR AFTER-SHAVE PREPARATIONS	7,942	0.3	95	8,955	0.4	12.8	8,604	0.4	-3.9	6,779	0.3	-21.2
69655	MANICURE OR PEDICURE SETS AND INSTRUMENTS (INCL. NAIL FILES)	6,579	0.3	1.8	5,048	0.2	-23.3	4,547	0.2	-9.9	4,055	0.2	-10.8
64163	PAPER TISSUE FOR HOUSEHOLD OR SANITARY PURPOSES	2,116	0.1	31.2	6,047	0.3	185.8	5,198	0.2	-14	3,703	0.2	-28.8
89982	POWDER PUFFS/PADS FOR COSMETICS/TOILET PREPARATIONS	1,736	0.1	-13.5	1,034	*	-40.5	2,131	0.1	106.2	1,286	0.1	-39.7
55352	PERSONAL DEODORANTS AND ANTI-PERSPIRANTS	563	*	-58.6	1,063	*	88.9	1,216	0.1	14.5	782	*	-35.7
55415	SOAP/ORGANIC SURFACE-ACTIVE PRODUCTS/PREPARATIONS FOR OTHER USE	1,034	*	-1.3	705	*	-31.8	593	*	-15.8	422	*	-28.8

* INSIGNIFICANT = INFINITY @ NOT AVAILABLE

..OVER 1000% INCREASE - NIL N.E.S. NOT ELSEWHERE SPECIFIED

SOURCE: HONG KONG TRADE STATISTICS, CENSUS & STATISTICS DEPT.

SOURCE: HONG KONG TRADE DEVELOPMENT COUNCIL

HONG KONG'S IMPORTS FROM FRANCE BY PRODUCT, 2012-2015

Appendix Table 6

											VALUE: USD (TH)		
		- 2012 -			- 2013 -			- 2014 -			JAN - DEC 2015		
SITC CODE	PRODUCTS	VALUE	%SHR	%CHG	VALUE	%SHR	%CHG	VALUE	%SHR	%CHG	VALUE	%SHR	%CHG
	TOTAL	887,722	100	14.3	882,613	100	-0.6	932,796	100	5.7	881,708	100	-5.5
55320	BEAUTY OR MAKE-UP PREPARATIONS FOR SKIN CARE	641,907	72.3	12.7	636,462	72.1	-0.8	682,476	73.2	7.2	664,785	75.4	-2.6
55310	PERFUMES AND TOILET WATERS	223,749	25.2	20.5	217,315	24.6	-2.9	226,003	24.2	4	195,597	22.2	-13.5
551	ESSENTIAL OILS, PERFUME AND FLAVOUR MATERIALS	4,394	0.5	14.3	5,790	0.7	31.8	6,004	0.6	3.7	5,621	0.6	-6.4
55330	PREPARATIONS FOR USE ON THE HAIR	2,815	0.3	43.2	4,537	0.5	61.2	2,882	0.3	-36.5	3,582	0.4	24.3
89989	COMBS, HAIR-SLIDES ETC; HAIRPINS, CURLING GRIPS; & PARTS	4,518	0.5	-1	4,329	0.5	-4.2	5,569	0.6	28.6	2,737	0.3	-50.9
55353	PERFUMED BATH SALTS AND OTHER BATH PREPARATIONS	1,020	0.1	72	2,053	0.2	101.2	1,909	0.2	-7	1,601	0.2	-16.2
71631	AC MOTORS	1,237	0.1	-28.2	3,405	0.4	175.2	1,241	0.1	-63.5	1,529	0.2	23.2
55352	PERSONAL DEODORANTS AND ANTI-PERSPIRANTS	336	*	-49.4	408	*	21.3	675	0.1	65.6	1,032	0.1	52.8
55419	SOAP IN LIQUID FORM	658	0.1	2.3	710	0.1	7.9	1,147	0.1	61.5	973	0.1	-15.1
55340	PREPARATIONS FOR ORAL OR DENTAL HYGIENE	131	*	-39.1	292	*	123.3	286	*	-1.8	876	0.1	206
87231	MECHANO-THERAPY APPLIANCES/MASSAGE APPARATUS, ETC	3,061	0.3	-5.4	2,670	0.3	-12.8	1,560	0.2	-41.6	828	0.1	-46.9
55411	SOAP/ORGANIC SURFACE-ACTIVE PRODUCTS/PREPARATIONS, FOR TOILET	360	*	-42.1	621	0.1	72.6	532	0.1	-14.5	649	0.1	22.1
89972	BROOMS/BRUSHES/SWEEPERS/MOPS/FEATHER DUSTERS/PAINTPADS, ETC	704	0.1	-3.4	832	0.1	18.2	787	0.1	-5.4	468	0.1	-40.5
71610	ELECTRIC MOTORS OF AN OUTPUT NOT EXCEEDING 37.5 W	296	*	18.7	82	*	-72.3	340	*	315.2	344	*	1
64163	PAPER TISSUE FOR HOUSEHOLD OR SANITARY PURPOSES	242	*	14.9	285	*	17.8	564	0.1	97.4	232	*	-58.8
89987	SCENT SPRAYS/SIMILAR TOILET SPRAYS, & MOUNTS & HEADS THEREFOR	153	*	-48.1	196	*	28.8	144	*	-26.6	221	*	53.3
55351	PRE-SHAVE, SHAVING OR AFTER-SHAVE PREPARATIONS	186	*	-68.4	616	0.1	230.7	84	*	-86.4	213	*	152.8
64294	PAPER HANDKERCHIEFS, TOWELS, TISSUES, TABLECLOTHS ETC	573	0.1	82.7	438	*	-23.6	193	*	-56	152	*	-21
65771	WADDING OF TEXTILE MATERIALS/ARTICLES; TEXTILE FIBRES <5MM	292	*	8.8	272	*	-6.8	43	*	-84.3	81	*	89.5
69523	PLIERS, PINCERS, TWEEZERS, METAL CUTTING SHEARS,ETC	188	*	-69.1	79	*	-58	58	*	-27.2	54	*	-5.9
89982	POWDER PUFFS/PADS FOR COSMETICS/TOILET PREPARATIONS	100	*	0.4	117	*	16.3	181	*	54.8	42	*	-76.5
77583	ELECTRO-THERMIC HAIR-DRESSING OR HAND-DRYING APPARATUS	16	*	-87.6	10	*	-38.9	48	*	396.8	33	*	-30.4
64243	TOILET PAPER, CUT TO SIZE	25	*	..	43	*	71.6	24	*	-44.9	29	*	22.3
83130	TRAVEL SETS FOR PERSONAL TOILET, SEWING ETC	752	0.1	411.4	1,047	0.1	39.2	-	-	-100	16	*	=
64295	SANITARY TOWELS & TAMPONS, NAPKINS & LINERS, OFPAPER, ETC	-	-	-	-	-	-	36	*	=	7	*	-79.3
69635	SAFETY RAZOR BLADES	-	-	-	-	-	-	-	-	-	2	*	=
69655	MANICURE OR PEDICURE SETS AND INSTRUMENTS (INCL. NAIL FILES)	8	*	543.3	5	*	-37.6	4	*	-19.1	2	*	-54.6
55415	SOAP/ORGANIC SURFACE-ACTIVE PRODUCTS/PREPARATIONS FOR OTHER USE	-	-	-	-	-	-	8	*	=	-	-	-100

* INSIGNIFICANT = INFINITY @ NOT AVAILABLE

..OVER 1000% INCREASE - NIL N.E.S. NOT ELSEWHERE SPECIFIED

SOURCE: HONG KONG TRADE STATISTICS, CENSUS & STATISTICS DEPT.

SOURCE:HONG KONG TRADE DEVELOPMENT COUNCIL

HONG KONG'S IMPORTS FROM JAPAN BY PRODUCT, 2012-2015

Appendix Table 7

SITC CODE	PRODUCTS	- 2012 - VALUE	- 2012 - %SHR	- 2012 - %CHG	- 2013 - VALUE	- 2013 - %SHR	- 2013 - %CHG	- 2014 - VALUE	- 2014 - %SHR	- 2014 - %CHG	JAN - DEC 2015 VALUE	JAN - DEC 2015 %SHR	JAN - DEC 2015 %CHG
											VALUE: USD (TH)		
	TOTAL	536,284	100	11.9	545,186	100	1.7	552,158	100	1.3	611,463	100	10.7
55320	BEAUTY OR MAKE-UP PREPARATIONS FOR SKIN CARE	337,914	63	5.5	337,086	61.8	-0.2	360,387	65.3	6.9	416,678	68.1	15.6
64295	SANITARY TOWELS & TAMPONS, NAPKINS & LINERS, OFPAPER, ETC	92,061	17.2	96.7	91,908	16.9	-0.2	83,938	15.2	-8.7	79,899	13.1	-4.8
55330	PREPARATIONS FOR USE ON THE HAIR	33,964	6.3	-1.7	44,151	8.1	30	39,219	7.1	-11.2	48,389	7.9	23.4
71631	AC MOTORS	10,733	2	-21.9	9,645	1.8	-10.1	11,274	2	16.9	8,360	1.4	-25.8
69523	PLIERS, PINCERS, TWEEZERS, METAL CUTTING SHEARS,ETC	8,857	1.7	-20.2	10,271	1.9	16	9,909	1.8	-3.5	8,328	1.4	-16
89972	BROOMS/BRUSHES/SWEEPERS/MOPS/FEATHER DUSTERS/PAINTPADS, ETC	6,446	1.2	25.4	5,444	1	-15.5	6,725	1.2	23.5	8,146	1.3	21.1
551	ESSENTIAL OILS, PERFUME AND FLAVOUR MATERIALS	4,554	0.8	-22.3	6,944	1.3	52.5	7,370	1.3	6.1	5,685	0.9	-22.9
87231	MECHANO-THERAPY APPLIANCES/MASSAGE APPARATUS, ETC	8,911	1.7	-11.1	8,847	1.6	-0.7	7,348	1.3	-16.9	5,415	0.9	-26.3
55340	PREPARATIONS FOR ORAL OR DENTAL HYGIENE	441	0.1	25.8	819	0.2	86	873	0.2	6.6	4,588	0.8	425.3
71610	ELECTRIC MOTORS OF AN OUTPUT NOT EXCEEDING 37.5 W	7,091	1.3	-20.8	8,084	1.5	14	3,159	0.6	-60.9	4,331	0.7	37.1
64294	PAPER HANDKERCHIEFS, TOWELS, TISSUES, TABLECLOTHS ETC	4,671	0.9	60.4	3,752	0.7	-19.7	4,603	0.8	22.7	3,969	0.6	-13.8
65771	WADDING OF TEXTILE MATERIALS/ARTICLES; TEXTILE FIBRES <5MM	3,211	0.6	-24.7	4,480	0.8	39.5	4,394	0.8	-1.9	3,123	0.5	-28.9
55353	PERFUMED BATH SALTS AND OTHER BATH PREPARATIONS	2,510	0.5	4	2,532	0.5	0.9	2,263	0.4	-10.6	3,100	0.5	37
55411	SOAP/ORGANIC SURFACE-ACTIVE PRODUCTS/PREPARATIONS, FOR TOILET	3,043	0.6	1	2,767	0.5	-9.1	2,603	0.5	-5.9	3,055	0.5	17.4
55352	PERSONAL DEODORANTS AND ANTI-PERSPIRANTS	768	0.1	-13.9	669	0.1	-12.9	1,023	0.2	52.9	1,337	0.2	30.7
69635	SAFETY RAZOR BLADES	1,691	0.3	2.5	1,452	0.3	-14.2	1,397	0.3	-3.7	1,333	0.2	-4.6
55419	SOAP IN LIQUID FORM	425	0.1	2.1	439	0.1	3.1	635	0.1	44.7	1,267	0.2	99.7
89989	COMBS, HAIR-SLIDES ETC; HAIRPINS, CURLING GRIPS; & PARTS	2,005	0.4	34	2,530	0.5	26.2	1,751	0.3	-30.8	1,071	0.2	-38.8
55310	PERFUMES AND TOILET WATERS	2,302	0.4	12.5	1,023	0.2	-55.6	1,103	0.2	7.8	873	0.1	-20.8
55351	PRE-SHAVE, SHAVING OR AFTER-SHAVE PREPARATIONS	849	0.2	-45.7	634	0.1	-25.4	904	0.2	42.7	732	0.1	-19
89982	POWDER PUFFS/PADS FOR COSMETICS/TOILET PREPARATIONS	801	0.1	3.7	351	0.1	-56.2	356	0.1	1.3	560	0.1	57.4
77583	ELECTRO-THERMIC HAIR-DRESSING OR HAND-DRYING APPARATUS	2,606	0.5	869.2	710	0.1	-72.7	264	*	-62.8	452	0.1	71.1
83130	TRAVEL SETS FOR PERSONAL TOILET, SEWING ETC	132	*	-2.9	85	*	-35.8	146	*	72.3	339	0.1	132.4
69655	MANICURE OR PEDICURE SETS AND INSTRUMENTS (INCL. NAIL FILES)	85	*	-56.6	338	0.1	299.9	308	0.1	-8.9	201	*	-34.9
64163	PAPER TISSUE FOR HOUSEHOLD OR SANITARY PURPOSES	42	*	45.5	75	*	77.4	55	*	-25.9	183	*	230.8
55415	SOAP/ORGANIC SURFACE-ACTIVE PRODUCTS/PREPARATIONS FOR OTHER USE	98	*	..	45	*	-54.2	107	*	139.5	33	*	-69.4
64243	TOILET PAPER, CUT TO SIZE	22	*	-45.7	54	*	144.2	16	*	-69.6	17	*	4.7
89987	SCENT SPRAYS/SIMILAR TOILET SPRAYS, & MOUNTS & HEADS THEREFOR	52	*	416	50	*	-3.1	28	*	-45	1	*	-96.7

* INSIGNIFICANT = INFINITY @ NOT AVAILABLE

..OVER 1000% INCREASE - NIL N.E.S. NOT ELSEWHERE SPECIFIED

SOURCE: HONG KONG TRADE STATISTICS, CENSUS & STATISTICS DEPT.

SOURCE: HONG KONG TRADE DEVELOPMENT COUNCIL

HONG KONG'S IMPORTS FROM KOREA (SOUTH) BY PRODUCT, 2012-2015

											VALUE: USD (TH)		
		- 2012 -			- 2013 -			- 2014 -			JAN - DEC 2015		
SITC CODE	PRODUCTS	VALUE	%SHR	%CHG	VALUE	%SHR	%CHG	VALUE	%SHR	%CHG	VALUE	%SHR	%CHG
	TOTAL	179,079	100	32.7	255,577	100	42.7	342,856	100	34.1	560,195	100	63.4
55320	BEAUTY OR MAKE-UP PREPARATIONS FOR SKIN CARE	139,173	77.7	46.9	210,793	82.5	51.5	291,827	85.1	38.4	495,138	88.4	69.7
64295	SANITARY TOWELS & TAMPONS, NAPKINS & LINERS, OFPAPER, ETC	18,370	10.3	13.5	18,055	7.1	-1.7	21,108	6.2	16.9	19,490	3.5	-7.7
55330	PREPARATIONS FOR USE ON THE HAIR	2,005	1.1	-32.5	2,917	1.1	45.5	3,935	1.1	34.9	13,516	2.4	243.5
64294	PAPER HANDKERCHIEFS, TOWELS, TISSUES, TABLECLOTHS ETC	684	0.4	46.8	1,771	0.7	158.9	4,127	1.2	133	9,553	1.7	131.5
87231	MECHANO-THERAPY APPLIANCES/MASSAGE APPARATUS, ETC	7,642	4.3	4.9	8,536	3.3	11.7	6,928	2	-18.8	5,176	0.9	-25.3
55353	PERFUMED BATH SALTS AND OTHER BATH PREPARATIONS	1,928	1.1	-14.3	2,789	1.1	44.7	3,608	1.1	29.4	3,899	0.7	8.1
65771	WADDING OF TEXTILE MATERIALS/ARTICLES; TEXTILE FIBRES <5MM	2,370	1.3	-28.2	2,154	0.8	-9.1	2,277	0.7	5.7	2,741	0.5	20.4
89982	POWDER PUFFS/PADS FOR COSMETICS/TOILET PREPARATIONS	143	0.1	-38.6	432	0.2	201.5	711	0.2	64.6	2,518	0.4	254.3
69655	MANICURE OR PEDICURE SETS AND INSTRUMENTS (INCL. NAIL FILES)	596	0.3		1,567	0.6	163	1,039	0.3	-33.7	1,845	0.3	77.6
71610	ELECTRIC MOTORS OF AN OUTPUT NOT EXCEEDING 37.5 W	886	0.5	-54.8	1,281	0.5	44.6	1,454	0.4	13.5	1,404	0.3	-3.5
71631	AC MOTORS	350	0.2	-71.7	1,574	0.6	349.6	2,663	0.8	69.2	1,184	0.2	-55.6
55310	PERFUMES AND TOILET WATERS	1,635	0.9	369.4	1,250	0.5	-23.6	845	0.2	-32.4	638	0.1	-24.5
55340	PREPARATIONS FOR ORAL OR DENTAL HYGIENE	243	0.1	-26.5	211	0.1	-13.1	387	0.1	83.8	622	0.1	60.6
89972	BROOMS/BRUSHES/SWEEPERS/MOPS/FEATHER DUSTERS/PAINTPADS, ETC	501	0.3	-59.3	473	0.2	-5.6	859	0.3	81.5	494	0.1	-42.5
55411	SOAP/ORGANIC SURFACE-ACTIVE PRODUCTS/PREPARATIONS, FOR TOILET	819	0.5	18.9	147	0.1	-82.1	15	*	-89.5	356	0.1	..
77583	ELECTRO-THERMIC HAIR-DRESSING OR HAND-DRYING APPARATUS	404	0.2	82.5	316	0.1	-21.7	164	*	-48.3	335	0.1	104.7
89989	COMBS, HAIR-SLIDES ETC; HAIRPINS, CURLING GRIPS; & PARTS	522	0.3	-1.6	400	0.2	-23.3	444	0.1	10.9	272	*	-38.7
55351	PRE-SHAVE, SHAVING OR AFTER-SHAVE PREPARATIONS	-	-	-	*	*	=	-	-	-100	252	*	=
551	ESSENTIAL OILS, PERFUME AND FLAVOUR MATERIALS	51	*	300.8	314	0.1	520.9	177	0.1	-43.7	233	*	31.6
64243	TOILET PAPER, CUT TO SIZE	45	*	-46.6	59	*	29.6	12	*	-79.6	222	*	..
69635	SAFETY RAZOR BLADES	660	0.4	379	352	0.1	-46.8	62	*	-82.3	118	*	89.9
55415	SOAP/ORGANIC SURFACE-ACTIVE PRODUCTS/PREPARATIONS FOR OTHER USE	9	*	..	55	*	505.7	66	*	19.6	55	*	-17.3
69523	PLIERS, PINCERS, TWEEZERS, METAL CUTTING SHEARS,ETC	7	*	-71.9	10	*	47.6	19	*	96	53	*	172.3
55419	SOAP IN LIQUID FORM	8	*	-35.2	21	*	182.2	68	*	218.9	44	*	-35.6
83130	TRAVEL SETS FOR PERSONAL TOILET, SEWING ETC	-	-	-	1	*	=	-	-	-100	22	*	=
89987	SCENT SPRAYS/SIMILAR TOILET SPRAYS, & MOUNTS & HEADS THEREFOR	22	*	28.2	98	*	337.7	57	*	-42.3	14	*	-76
64163	PAPER TISSUE FOR HOUSEHOLD OR SANITARY PURPOSES	6	*	=	-	-	-100	-	-	-	*	*	=
55352	PERSONAL DEODORANTS AND ANTI-PERSPIRANTS	-	-	-	-	-	-	2	*	=	-	-	-100

* INSIGNIFICANT = INFINITY @ NOT AVAILABLE

..OVER 1000% INCREASE - NIL N.E.S. NOT ELSEWHERE SPECIFIED

SOURCE: HONG KONG TRADE STATISTICS, CENSUS & STATISTICS DEPT.

SOURCE:HONG KONG TRADE DEVELOPMENT COUNCIL

HONG KONG'S IMPORTS BY PRODUCTS, 2012-2015

Appendix Table 2

		- 2012 -			- 2013 -			- 2014 -			JAN - DEC 2015		
SITC CODE	PRODUCTS	VALUE	%SHR	%CHG	VALUE	%SHR	%CHG	VALUE	%SHR	%CHG	VALUE	%SHR	%CHG
	TOTAL	5,963,090	100	11.1	6,036,433	100	1.2	6,205,132	100	2.8	6,351,929	100	2.4
55320	BEAUTY OR MAKE-UP PREPARATIONS FOR SKIN CARE	2,251,264	37.8	18.5	2,365,537	39.2	5.1	2,582,105	41.6	9.2	2,852,520	44.9	10.5
71610	ELECTRIC MOTORS OF AN OUTPUT NOT EXCEEDING 37.5 W	1,462,781	24.5	2.7	1,355,209	22.5	-7.4	1,362,224	22	0.5	1,325,715	20.9	-2.7
55310	PERFUMES AND TOILET WATERS	405,626	6.8	11.6	417,840	6.9	3	425,789	6.9	1.9	378,930	6	-11
55330	PREPARATIONS FOR USE ON THE HAIR	204,327	3.4	13.9	225,493	3.7	10.4	229,450	3.7	1.8	255,464	4	11.3
64295	SANITARY TOWELS & TAMPONS, NAPKINS & LINERS, OFPAPER, ETC	197,246	3.3	39.5	201,444	3.3	2.1	200,919	3.2	-0.3	199,184	3.1	-0.9
71631	AC MOTORS	234,954	3.9	-19.2	226,334	3.7	-3.7	215,094	3.5	-5	177,487	2.8	-17.5
551	ESSENTIAL OILS, PERFUME AND FLAVOUR MATERIALS	101,759	1.7	4.3	116,144	1.9	14.1	127,801	2.1	10	133,727	2.1	4.6
64294	PAPER HANDKERCHIEFS, TOWELS, TISSUES, TABLECLOTHS ETC	122,227	2	10.5	119,336	2	-2.4	133,188	2.1	11.6	129,753	2	-2.6
64243	TOILET PAPER, CUT TO SIZE	109,951	1.8	1.2	114,522	1.9	4.2	119,837	1.9	4.6	125,491	2	4.7
55353	PERFUMED BATH SALTS AND OTHER BATH PREPARATIONS	102,648	1.7	2.3	108,719	1.8	5.9	116,847	1.9	7.5	113,810	1.8	-2.6
87231	MECHANO-THERAPY APPLIANCES/MASSAGE APPARATUS, ETC	141,186	2.4	17.3	148,410	2.5	5.1	116,225	1.9	-21.7	106,438	1.7	-8.4
77583	ELECTRO-THERMIC HAIR-DRESSING OR HAND-DRYING APPARATUS	187,144	3.1	16	176,336	2.9	-5.8	131,527	2.1	-25.4	100,859	1.6	-23.3
55340	PREPARATIONS FOR ORAL OR DENTAL HYGIENE	65,476	1.1	12.3	76,562	1.3	16.9	81,274	1.3	6.2	95,447	1.5	17.4
89972	BROOMS/BRUSHES/SWEEPERS/MOPS/FEATHER DUSTERS/PAINTPADS, ETC	75,788	1.3	*	78,063	1.3	3	80,960	1.3	3.7	80,805	1.3	-0.2
89989	COMBS, HAIR-SLIDES ETC; HAIRPINS, CURLING GRIPS; & PARTS	46,366	0.8	-7.4	58,462	1	26.1	55,537	0.9	-5	54,984	0.9	-1
69635	SAFETY RAZOR BLADES	90,059	1.5	332.6	75,572	1.3	-16.1	48,484	0.8	-35.8	41,758	0.7	-13.9
65771	WADDING OF TEXTILE MATERIALS/ARTICLES; TEXTILE FIBRES <5MM	32,842	0.6	-2.5	30,201	0.5	-8	35,391	0.6	17.2	32,782	0.5	-7.4
83130	TRAVEL SETS FOR PERSONAL TOILET, SEWING ETC	19,530	0.3	17.6	21,539	0.4	10.3	18,029	0.3	-16.3	22,869	0.4	26.8
55411	SOAP/ORGANIC SURFACE-ACTIVE PRODUCTS/PREPARATIONS, FOR TOILET	20,407	0.3	-6.9	23,140	0.4	13.4	23,579	0.4	1.9	21,322	0.3	-9.6
69523	PLIERS, PINCERS, TWEEZERS, METAL CUTTING SHEARS,ETC	19,353	0.3	-18.6	20,682	0.3	6.9	19,759	0.3	-4.5	18,910	0.3	-4.3
55352	PERSONAL DEODORANTS AND ANTI-PERSPIRANTS	7,852	0.1	-9.7	9,443	0.2	20.3	14,101	0.2	49.3	17,773	0.3	26
55419	SOAP IN LIQUID FORM	14,283	0.2	-7.5	14,486	0.2	1.4	16,634	0.3	14.8	17,359	0.3	4.4
55351	PRE-SHAVE, SHAVING OR AFTER-SHAVE PREPARATIONS	17,117	0.3	37.3	19,217	0.3	12.3	18,919	0.3	-1.6	15,844	0.2	-16.3
89987	SCENT SPRAYS/SIMILAR TOILET SPRAYS, & MOUNTS & HEADS THEREFOR	12,858	0.2	-9.5	12,417	0.2	-3.4	8,578	0.1	-30.9	11,357	0.2	32.4
69655	MANICURE OR PEDICURE SETS AND INSTRUMENTS (INCL. NAIL FILES)	8,607	0.1	-1.2	8,178	0.1	-5	7,170	0.1	-12.3	7,815	0.1	9
89982	POWDER PUFFS/PADS FOR COSMETICS/TOILET PREPARATIONS	5,354	0.1	14	3,754	0.1	-29.9	5,793	0.1	54.3	6,758	0.1	16.7
64163	PAPER TISSUE FOR HOUSEHOLD OR SANITARY PURPOSES	4,435	0.1	13.2	8,066	0.1	81.9	7,881	0.1	-2.3	5,595	0.1	-29

55415	SOAP/ORGANIC SURFACE-ACTIVE PRODUCTS/PREPARATIONS FOR OTHER USE	1,650	*	-3.8	1,326	*	-19.6	2,036	*	53.6	1,173	*	-42.4

* INSIGNIFICANT = INFINITY @ NOT AVAILABLE

..OVER 1000% INCREASE - NIL N.E.S. NOT ELSEWHERE SPECIFIED

SOURCE: HONG KONG TRADE STATISTICS, CENSUS & STATISTICS DEPT.

SOURCE:HONG KONG TRADE DEVELOPMENT COUNCIL

HONG KONG'S DOMESTIC EXPORTS BY PRODUCT, 2012-2015

Appendix Table 1

											VALUE: USD (TH)		
		- 2012 -			- 2013 -			- 2014 -			JAN - DEC 2015		
SITC CODE	PRODUCTS	VALUE	%SHR	%CHG	VALUE	%SHR	%CHG	VALUE	%SHR	%CHG	VALUE	%SHR	%CHG
	TOTAL	109,266	100	7.7	110,836	100	1.4	112,644	100	1.6	129,366	100	14.8
551	ESSENTIAL OILS, PERFUME AND FLAVOUR MATERIALS	93,360	85.4	11.4	93,243	84.1	-0.1	97,022	86.1	4.1	102,033	78.9	5.2
55320	BEAUTY OR MAKE-UP PREPARATIONS FOR SKIN CARE	10,680	9.8	6.6	12,964	11.7	21.4	10,043	8.9	-22.5	19,709	15.2	96.2
55340	PREPARATIONS FOR ORAL OR DENTAL HYGIENE	524	0.5	399.6	44	*	-91.6	431	0.4	881	2,170	1.7	403.4
71610	ELECTRIC MOTORS OF AN OUTPUT NOT EXCEEDING 37.5 W	605	0.6	8.5	496	0.4	-18.1	229	0.2	-53.8	1,533	1.2	569.6
55330	PREPARATIONS FOR USE ON THE HAIR	734	0.7	-4.5	722	0.7	-1.7	610	0.5	-15.5	859	0.7	40.6
64295	SANITARY TOWELS & TAMPONS, NAPKINS & LINERS, OFPAPER, ETC	21	*	-9.2	34	*	64.6	327	0.3	855.2	710	0.5	116.9
87231	MECHANO-THERAPY APPLIANCES/MASSAGE APPARATUS, ETC	811	0.7	-4.6	1,036	0.9	27.6	866	0.8	-16.4	615	0.5	-29
64294	PAPER HANDKERCHIEFS, TOWELS, TISSUES, TABLECLOTHS ETC	809	0.7	62	487	0.4	-39.9	1,649	1.5	238.8	603	0.5	-63.4
89972	BROOMS/BRUSHES/SWEEPERS/MOPS/FEATHER DUSTERS/PAINTPADS, ETC	124	0.1	-32.7	103	0.1	-17	135	0.1	30.9	340	0.3	152.2
55353	PERFUMED BATH SALTS AND OTHER BATH PREPARATIONS	247	0.2	24.4	424	0.4	72	289	0.3	-32	303	0.2	4.9
65771	WADDING OF TEXTILE MATERIALS/ARTICLES; TEXTILE FIBRES <5MM	1,107	1	-0.4	1,034	0.9	-6.6	885	0.8	-14.4	141	0.1	-84
55310	PERFUMES AND TOILET WATERS	31	*	-47	27	*	-15.5	-	-	-100	108	0.1	=
89989	COMBS, HAIR-SLIDES ETC; HAIRPINS, CURLING GRIPS; & PARTS	88	0.1	-4.1	137	0.1	56.3	25	*	-81.5	84	0.1	231.2
83130	TRAVEL SETS FOR PERSONAL TOILET, SEWING ETC	1	*	=	-	-	-100	6	*	=	82	0.1	..
55352	PERSONAL DEODORANTS AND ANTI-PERSPIRANTS	60	0.1	2.1	39	*	-34.6	80	0.1	104.3	48	*	-39.8
55411	SOAP/ORGANIC SURFACE-ACTIVE PRODUCTS/PREPARATIONS, FOR TOILET	14	*	362.7	2	*	-85	*	*	-90	20	*	..
55419	SOAP IN LIQUID FORM	14	*	29.4	11	*	-17.4	9	*	-21.4	8	*	-5.9
55351	PRE-SHAVE, SHAVING OR AFTER-SHAVE PREPARATIONS	7	*	=	-	-	-100	-	-	-	-	-	-
55415	SOAP/ORGANIC SURFACE-ACTIVE PRODUCTS/PREPARATIONS FOR OTHER USE	-	-	-	-	-	-	-	-	-	-	-	-
64163	PAPER TISSUE FOR HOUSEHOLD OR SANITARY PURPOSES	-	-	-	-	-	-	-	-	-	-	-	-
64243	TOILET PAPER, CUT TO SIZE	*	*	-0.2	*	*	-76.2	-	-	-100	-	-	-
69523	PLIERS, PINCERS, TWEEZERS, METAL CUTTING SHEARS,ETC	2	*	-88.5	-	-	-100	-	-	-	-	-	-
69635	SAFETY RAZOR BLADES	-	-	-	-	-	-	-	-	-	-	-	-
69655	MANICURE OR PEDICURE SETS AND INSTRUMENTS (INCL. NAIL FILES)	-	-	-	-	-	-	-	-	-	-	-	-
71631	AC MOTORS	21	*	-54	7	*	-66.9	16	*	124.4	-	-	-100
77583	ELECTRO-THERMIC HAIR-DRESSING OR HAND-DRYING APPARATUS	-	-	-100	-	-	-	4	*	=	-	-	-100
89982	POWDER PUFFS/PADS FOR COSMETICS/TOILET PREPARATIONS	3	*	-13.3	23	*	648.4	8	*	-66.5	-	-	-100
89987	SCENT SPRAYS/SIMILAR TOILET SPRAYS, & MOUNTS & HEADS THEREFOR	-	-	-	3	*	=	9	*	174.7	-	-	-100

* INSIGNIFICANT = INFINITY @ NOT AVAILABLE

..OVER 1000% INCREASE - NIL N.E.S. NOT ELSEWHERE SPECIFIED

SOURCE: HONG KONG TRADE STATISTICS, CENSUS & STATISTICS DEPT.

SOURCE:HONG KONG TRADE DEVELOPMENT COUNCIL

HONG KONG - DISTRIBUTION OF PERSONAL CARE COSMETIC PRODUCTS BY CHANNELS % RETAIL VALUE, 2012-2015

Appendix Table 3

% Retail value (retail selling price)				
	2012	**2013**	**2014**	**2015**
Store-Based Retailing	92.4	92.4	92.4	92.4
-Grocery Retailers	14.4	14	13.9	14
--Modern Grocery Retailers	14	13.7	13.6	13.7
---Convenience Stores	1.3	1	1	1
---Discounters	-	-	-	-
---Forecourt Retailers	-	-	-	-
---Hypermarkets	-	-	-	-
---Supermarkets	12.7	12.7	12.6	12.7
--Traditional Grocery Retailers	0.3	0.3	0.3	0.3
---Food/drink/tobacco specialists	-	-	-	-
---Independent Small Grocers	0.3	0.3	0.3	0.3
---Other Grocery Retailers	-	-	-	-
-Non-Grocery Specialists	59	59.4	59.9	60.4
--Apparel and Footwear Specialist Retailers	-	-	-	-
--Electronics and Appliance Specialist Retailers	0.2	0.2	0.2	0.2
--Health and Beauty Specialist Retailers	58.8	59.2	59.7	60.1
---Beauty Specialist Retailers	39.7	40.9	41.6	41.9
---Chemicals/Pharmacies	1.4	1.3	1.3	1.2
---Drugstores/Parapharmacies	17.7	17	16.9	17
---Other Health and Beauty Specialist Retailers	-	-	-	-
--Home and Garden Specialist Retailers	-	-	-	-
---Homewares and home Furnishing Stores	-	-	-	-
--Other Non-Grocery Specialists	0	-	0	0.1
---Outdoor Markets	-	-	-	-
---Other BPC Non-Grocery Specialists	0	-	0	0.1
-Mixed Retailers	19	19	18.6	18
--Department Stores	18.6	18.7	18.3	17.7
--Mass Merchandisers	-	-	-	-
--Variety Stores	0.4	0.3	0.3	0.3
--Warehouse Clubs	-	-	-	-
Non-Store Retailing	5.4	5.4	5.5	5.5
-Direct Selling	5.1	5.1	5.1	5.1
-Homeshopping	-	-	-	-
-Internet Retailing	0.3	0.4	0.4	0.4
-Vending	-	-	-	-
Non-Retail Channels	2.2	2.2	2.1	2.2
-Hair Salons	2.2	2.2	2.1	2.2
Total	100	100	100	100

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

Indonesia Personal Care and Cosmetics Trade
2011-2015

Table 4: Indonesia Total Personal Care and Cosmetics Imports

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Imports
3301	Essential Oils	$57,872,317	$68,774,333	$137,455,098	$122,402,890	$114,912,453	15%	-16%	10%
330290	Fragrances & Substances Used as Inputs	$275,894,977	$318,041,703	$348,840,202	$328,725,482	$318,332,115	3%	-9%	28%
3303	Perfumes And Toilet Waters	$72,327,965	$84,739,634	$122,617,725	$110,820,578	$93,435,110	5%	-24%	8%
3304	Make-Up & Skin-Care Preparations	$110,429,819	$144,109,996	$174,399,550	$174,094,169	$158,118,513	7%	-9%	14%
3305	Hair Care Products	$162,504,220	$152,045,290	$169,780,943	$134,381,303	$127,601,268	-5%	-25%	11%
3306	Oral & Dental Hygiene	$10,957,239	$18,856,313	$23,759,442	$17,384,510	$27,725,610	20%	17%	2%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$36,361,396	$39,954,141	$51,036,987	$47,207,366	$46,542,523	5%	-9%	4%
3401	Soap & Other Products to Wash the Skin	$21,595,670	$30,446,318	$38,052,998	$35,979,249	$43,168,949	15%	13%	4%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$7,675,990	$5,672,079	$10,392,425	$12,513,518	$13,197,620	11%	27%	1%
4818	Personal Care Wipes, Diapers, Tampons	$159,391,951	$19,511,032	$7,128,371	$5,822,329	$5,938,180	-48%	-17%	1%
5601	Sanitary Towels and Napkins	NA	$12,703,249	$17,503,146	$20,004,390	$26,931,573	NA	54%	2%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$46,897,197	$48,777,792	$55,938,567	$58,199,379	$62,683,735	6%	12%	6%
9605	Toilet Sets for Personal Travel	$490,161	$156,881	$376,405	$354,907	$528,118	2%	40%	0%
9619	Diapers and Fem Hygiene	NA	$144,357,653	$134,184,436	$128,114,353	$89,274,138	-11%	-33%	8%
	Total Imports	$962,398,902	$1,088,146,414	$1,291,466,295	$1,196,004,423	$1,128,389,905	3%	-13%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Indonesia Personal Care and Cosmetics Trade
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Table 5: Indonesia Imports of Personal Care and Cosmetics Products from the U.S.

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$5,288,907	$5,779,559	$5,190,138	$7,013,850	$6,787,118	5%	31%	22%
330290	Fragrances & Substances Used as Inputs	$1,936,284	$2,294,073	$928,383	$4,539,584	$5,243,745	22%	465%	17%
3303	Perfumes And Toilet Waters	$29,475	$97,952	$503,894	$87,684	$111,839	31%	-78%	0%
3304	Make-Up & Skin-Care Preparations	$4,841,342	$7,617,880	$7,522,066	$12,658,453	$13,482,727	23%	79%	43%
3305	Hair Care Products	$438,331	$425,911	$735,026	$1,436,205	$1,492,020	28%	103%	5%
3306	Oral & Dental Hygiene	$44,570	$291,431	$308,955	$208,630	$206,464	36%	-33%	1%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$881,611	$3,167,723	$1,555,311	$1,275,684	$2,697,630	25%	73%	9%
3401	Soap & Other Products to Wash the Skin	$930,406	$618,140	$863,851	$1,246,575	$571,654	-9%	-34%	2%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$106,166	$34,807	$82,070	$76,064	$143,759	6%	75%	0%
4818	Personal Care Wipes, Diapers, Tampons	$528,446	$148,535	$172,557	$31,307	$46,743	-38%	-73%	0%
5601	Sanitary Towels and Napkins	$98,816	NA	$13,176	NA	$9,875	-37%	-25%	0%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$955,151	$1,139,189	$1,259,790	$587,166	$420,449	-15%	-67%	1%
9605	Toilet Sets for Personal Travel	NA	$29,935	NA	NA	$26,163	#VALUE!	#VALUE!	0%
9619	Diapers and Fem Hygiene	$0	$211,667	$278,882	$201,205	$158,053	-7%	-43%	1%
	Total Imports	$16,079,505	$21,856,802	$19,414,099	$29,362,407	$31,398,239	9%	62%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Indonesia Personal Care and Cosmetics Trade
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Table 6: Indonesia's Imports of Personal Care and Cosmetics Products from China

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$16,552,028	$28,442,623	$57,057,242	$70,414,624	$76,814,532	36%	35%	45%
330290	Fragrances & Substances Used as Inputs	$42,791,498	$50,097,649	$44,515,257	$31,626,258	$19,195,562	-15%	-57%	11%
3303	Perfumes And Toilet Waters	$17,772	$71,914	$14,741	$22,193	$8,727	-13%	-41%	0%
3304	Make-Up & Skin-Care Preparations	$6,663,285	$6,964,658	$9,323,744	$12,263,698	$10,255,106	9%	10%	6%
3305	Hair Care Products	$4,434,330	$8,057,117	$20,657,438	$13,752,845	$12,036,886	22%	-42%	7%
3306	Oral & Dental Hygiene	$277,818	$621,873	$579,686	$943,353	$1,492,340	40%	157%	1%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$4,366,813	$3,274,382	$8,487,540	$9,797,455	$8,134,864	13%	-4%	5%
3401	Soap & Other Products to Wash the Skin	$514,564	$1,479,886	$1,199,665	$823,550	$684,656	6%	-43%	0%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$388,474	$309,510	$2,120,182	$4,423,043	$1,155,594	24%	-45%	1%
4818	Personal Care Wipes, Diapers, Tampons	$21,360,912	$7,558,502	$4,320,838	$3,327,835	$3,429,300	-31%	-21%	2%
5601	Sanitary Towels and Napkins	$1,103,639	$3,344,464	$2,608,834	$6,782,868	$7,006,448	45%	169%	4%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$23,006,246	$26,218,363	$27,698,013	$28,621,740	$30,446,222	6%	10%	18%
9605	Toilet Sets for Personal Travel	$161,989	$132,569	$205,655	$188,223	$265,219	10%	29%	0%
9619	Diapers and Fem Hygiene	NA	$15,803,434	$8,558,465	$11,015,124	$10,000,629	-11%	17%	6%
	Total Imports	$121,639,368	$136,573,510	$178,788,835	$182,987,685	$170,925,456	7%	-4%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Indonesia Personal Care and Cosmetics Trade
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Table 7: Indonesia's Imports of Personal Care and Cosmetics Products from France

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$1,420,894	$4,684,984	$4,454,382	$3,880,099	$3,511,877	20%	-21%	4%
330290	Fragrances & Substances Used as Inputs	$23,110,905	$21,962,488	$29,209,754	$27,935,766	$19,195,562	-4%	-34%	21%
3303	Perfumes And Toilet Waters	$41,522,514	$44,054,004	$60,346,129	$53,834,302	$44,875,188	2%	-26%	49%
3304	Make-Up & Skin-Care Preparations	$6,516,186	$11,317,865	$19,775,273	$20,096,477	$21,052,220	26%	6%	23%
3305	Hair Care Products	$924,330	$540,569	$706,431	$722,604	$779,040	-3%	10%	1%
3306	Oral & Dental Hygiene	NA	NA	NA	NA	NA	NA	NA	NA
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$1,420,894	$440,811	$813,749	$445,449	$345,619	-25%	-58%	0%
3401	Soap & Other Products to Wash the Skin	$213,013	$225,660	$467,767	$951,917	$1,190,005	41%	154%	1%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$192,056	$263,203	$396,328	$154,105	$72,267	-18%	-82%	0%
4818	Personal Care Wipes, Diapers, Tampons	$33,652	$78,739	$60,971	$152	$196	-64%	-100%	0%
5601	Sanitary Towels and Napkins	$2,919	$3,344,464	NA	$6,642	$2,333	-4%	NA	0%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$121,484	NA	$81,012	$203,308	$116,082	-1%	43%	0%
9605	Toilet Sets for Personal Travel	$220	$159	NA	$3,509	$21,225	149%	NA	0%
9619	Diapers and Fem Hygiene	NA	$4,958	$101,153	$58,299	$0	-100%	-100%	0%
	Total Imports	$75,479,067	$86,917,904	$116,412,949	$108,292,629	$91,161,614	4%	-22%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Indonesia Personal Care and Cosmetics Trade
2011-2015

Table 8: Indonesia's Imports of Personal Care and Cosmetics Products from Japan

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$835,366	$956,715	$1,226,241	$482,910	$446,735	-12%	-64%	1%
330290	Fragrances & Substances Used as Inputs	$15,972,537	$15,331,808	$13,224,989	$11,472,027	$10,021,416	-9%	-24%	17%
3303	Perfumes And Toilet Waters	$28,681	$6,399	$5,182	$132	$6	-82%	-100%	0%
3304	Make-Up & Skin-Care Preparations	$7,897,512	$15,668,089	$15,243,818	$21,061,407	$24,580,352	25%	61%	41%
3305	Hair Care Products	$619,689	$1,046,402	$757,127	$1,336,210	$1,682,920	22%	122%	3%
3306	Oral & Dental Hygiene	$27,820	NA	NA	NA	NA	#VALUE!	#VALUE!	#VALUE!
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$35,290	$92,480	$79,986	$1,166,870	$1,149,233	101%	1337%	2%
3401	Soap & Other Products to Wash the Skin	$85,083	$81,728	$346,676	$1,177,775	$1,772,383	84%	411%	3%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$1,080,099	$2,236,006	$3,144,559	$4,000,554	$7,216,325	46%	129%	12%
4818	Personal Care Wipes, Diapers, Tampons	$38,826,243	$822,761	$68,673	$95,030	$141,108	-67%	105%	0%
5601	Sanitary Towels and Napkins	$1,219,708	$1,513,872	$1,236,771	$883,089	$2,422,931	15%	96%	4%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$991,286	$1,165,836	$978,053	$1,389,425	$1,214,631	4%	24%	2%
9605	Toilet Sets for Personal Travel	$311,607	$290	$643	NA	$575	-72%	-11%	0%
9619	Diapers and Fem Hygiene	NA	$50,013,013	$33,031,273	$12,071,515	$9,515,474	-34%	-71%	16%
	Total Imports	$67,930,921	$88,935,399	$69,343,991	$55,136,944	$60,164,089	-9%	-13%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Indonesia Personal Care and Cosmetics Trade
2011-2015

Table 9: Indonesia's Imports of Personal Care and Cosmetics Products from South Korea

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	NA	NA	NA	NA	NA	NA	NA	NA
330290	Fragrances & Substances Used as Inputs	NA	$2,768	$7,967	$60,386	$81,911	133%	928%	1%
3303	Perfumes And Toilet Waters	$403,544	$447,124	$378,443	$444,600	$612,308	9%	62%	5%
3304	Make-Up & Skin-Care Preparations	$1,348,243	$2,459,757	$3,482,330	$4,328,111	$3,780,798	23%	9%	28%
3305	Hair Care Products	$14,029	$52,448	$170,103	$258,590	$359,876	91%	112%	3%
3306	Oral & Dental Hygiene	$47,261	$69,766	$233,020	$399	$14,104	-21%	-94%	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$487,577	$117,570	$205,493	$185,021	$587,729	4%	186%	4%
3401	Soap & Other Products to Wash the Skin	$156,887	$151,925	$128,595	$307,695	$384,243	20%	199%	3%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$207,577	$117,580	$270,874	$438,240	$489,197	19%	81%	4%
4818	Personal Care Wipes, Diapers, Tampons	$192,372	$488,434	$355,878	$265,747	$207,298	2%	-42%	2%
5601	Sanitary Towels and Napkins	$619,092	$1,851,439	$1,850,564	$4,401,426	$6,342,681	59%	243%	47%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$427,435	$421,105	$708,913	$686,333	$690,041	10%	-3%	5%
9605	Toilet Sets for Personal Travel	$460	$3,730	$5,768	$276	$1,848	32%	-68%	0%
9619	Diapers and Fem Hygiene	NA	$88,146	$595,541	$70,950	$0	NA	-100%	0%
	Total Imports	$3,904,477	$6,271,792	$8,393,489	$11,447,774	$13,552,034	28%	61%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Indonesia Personal Care and Cosmetics Trade
2011-2015

Table 10: Indonesia's Imports of Personal Care and Cosmetics Products from Thailand

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$146,044	$81,112	$286	$67,364	$31,963	-26%	11076%	0%
330290	Fragrances & Substances Used as Inputs	$2,365,137	$2,928,700	$2,591,879	$2,378,923	$2,292,296	-1%	-12%	1%
3303	Perfumes And Toilet Waters	$38,277	$78,843	$145,920	$590,020	$1,600	-47%	-99%	0%
3304	Make-Up & Skin-Care Preparations	$40,739,302	$44,373,397	$87,601,097	$34,179,515	$19,209,393	-14%	-78%	9%
3305	Hair Care Products	$149,627,815	$130,817,055	$123,261,799	$107,450,140	$100,399,782	-8%	-19%	47%
3306	Oral & Dental Hygiene	$8,313,615	$14,183,663	$15,409,345	$12,365,155	$19,265,564	18%	25%	9%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$7,190,873	$5,169,716	$4,423,762	$7,085,355	$12,143,423	11%	175%	6%
3401	Soap & Other Products to Wash the Skin	$2,387,402	$12,290,332	$17,958,067	$12,699,534	$12,811,678	40%	-29%	6%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$1,199,676	$1,114,515	$2,381,752	$1,359,871	$1,920,369	10%	-19%	1%
4818	Personal Care Wipes, Diapers, Tampons	$51,796,901	$1,188,272	$878,338	$550,383	$40,149	-76%	-95%	0%
5601	Sanitary Towels and Napkins	$19,612	$872,303	$788,830	$1,291,360	$1,558,546	140%	98%	1%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$4,134,071	$5,390,304	$5,437,247	$7,864,586	$8,919,457	17%	64%	4%
9605	Toilet Sets for Personal Travel	$1,427	$290	$14,660	NA	$144	-37%	-99%	0%
9619	Diapers and Fem Hygiene	NA	$42,888,765	$51,892,468	$68,318,664	$36,222,679	-4%	-30%	17%
	Total Imports	$267,960,152	$261,377,267	$312,785,450	$256,200,870	$214,817,043	-4%	-31%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Indonesia Personal Care and Cosmetics Trade
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Table 3: Imported Products Share of Indonesia's Personal Care and Cosmetics Market

Importer	2011	% Market Share	2012	% Market Share	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	$16,079,505	2%	$21,856,802	2%	$19,414,099	2%	$29,362,407	2%	$31,398,239	3%
France	$75,479,067	8%	$86,917,904	8%	$116,412,949	9%	$108,292,629	9%	$91,161,614	8%
Japan	$67,930,921	7%	$88,935,399	8%	$69,343,991	5%	$55,136,944	5%	$60,164,089	5%
South Korea	$3,904,477	0%	$6,271,792	1%	$11,447,774	1%	$11,447,774	1%	$13,552,034	1%
Thailand	$267,960,152	28%	$261,377,267	24%	$312,785,450	24%	$312,785,450	26%	$214,817,043	19%
China	$121,639,368	13%	$136,573,510	13%	$178,788,835	14%	$182,987,685	15%	$170,925,456	15%
Others	$409,405,412	43%	$486,213,740	45%	$583,273,197	45%	$495,991,534	41%	$546,371,430	48%
Total Imports	$962,398,902	100%	$1,088,146,414	100%	$1,291,466,295	100%	$1,196,004,423	100%	$1,128,389,905	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 11: HS 34: Make Up Products, US Exports to Indonesia

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to Indonesia
3304	Make-Up & Skin-Care Preparations	$4,841,342	$7,617,880	$7,522,066	$12,658,453	$13,482,727	79%	23%	43%
330410	Lipstick, other prep	$700,825	$374,323	$654,535	$856,859	$1,171,422	79%	11%	4%
330420	Eye Make-Up	$330,232	$843,204	$573,877	$179,834	$324,257	-43%	0%	1%
330430	Manicure & Pedicure Preparations	$256,115	$196,043	$244,494	$207,660	$190,033	-22%	-6%	1%
330491	Powder Make-Up Or Skin Care Preparations	$194,134	$277,277	$271,110	$597,409	$383,030	41%	15%	1%
330499	Beauty & Skin Care Prep	$3,360,036	$5,927,033	$5,778,050	$10,816,691	$11,413,985	98%	28%	36%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 12: HS 35: Hair Care Products, US Exports to Indonesia

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to Indonesia
3305	Hair Care Products	$438,331	$425,911	$735,026	$1,436,205	$1,492,020	103%	28%	5%
330510	Shampoo	$102,733	$99,198	$364,977	$917,515	$562,019	54%	40%	2%
330520	Prep for Waiving and Straightening Hair	NA	NA	NA	NA	NA	NA	NA	NA
330530	Hair Lacquer	NA	$12,260	NA	$6,684	NA	NA	NA	NA
330590	Other Hair Products, inc. Color	$335,598	$314,453	$370,049	$512,006	$930,001	151%	23%	3%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 13: HS 37: Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants, US Exports to Indonesia

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to Indonesia
3307*	Cosmetic & Toilet Prep	$881,611	$1,068,988	$1,201,660	$258,677	$162,847	-86%	-31%	1%
330710	Shaving Preparations	NA	NA	$16,653	$12,563	$15,936	-4%	NA	0%
330720	Personal Deodorants and Antiperspirants	NA	$206,972	$90,962	$106,623	$17,487	-81%	-39%	0%
330730	Perfumed Bath Salts And Other Bath	NA	NA	NA	$4,380	$4,380	NA	NA	0%
330790	Depilatories, Other Perfumery	$881,611	$862,016	$1,094,045	$135,111	$125,044	-89%	-32%	0%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Note the total for 3307 includes 330741 and 330749, which are not provided here as they are not directly related to personal care.

India Personal Care and Cosmetics Trade
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Table 2: India Total Personal Care and Cosmetics Imports

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Imports
3301	Essential Oils	$121,679,535	$120,740,472	$135,683,212	$159,914,337	$160,505,535	6%	18%	21%
330290	Fragrances & Substances Used as Inputs	$50,522,075	$59,756,080	$56,980,844	$63,162,956	$67,262,553	6%	18%	9%
3303	Perfumes And Toilet Waters	$63,852,862	$70,434,937	$68,856,128	$68,850,094	$70,172,445	2%	2%	9%
3304	Make-Up & Skin-Care Preparations	$89,376,642	$105,089,647	$109,346,344	$119,457,171	$112,294,996	5%	3%	14%
3305	Hair Care Products	$32,482,748	$38,554,990	$41,194,868	$39,874,945	$33,096,430	0%	-20%	4%
3306	Oral & Dental Hygiene	$17,600,975	$16,708,564	$22,542,216	$24,176,467	$14,958,966	-3%	-34%	2%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$85,730,543	$116,702,843	$108,909,426	$114,992,743	$116,206,608	6%	7%	15%
3401	Soap & Other Products to Wash the Skin	$43,572,307	$47,010,682	$44,735,283	$47,944,114	$49,127,447	2%	10%	6%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$3,260,730	$4,188,743	$5,032,993	$7,636,441	$8,883,515	22%	77%	1%
4818	Personal Care Wipes, Diapers, Tampons	$113,641,256	$66,995,691	$10,246,109	$12,999,281	$11,086,485	-37%	8%	1%
5601	Sanitary Towels and Napkins	$17,840,897	$20,412,891	$19,882,794	$22,843,693	$28,348,994	10%	43%	4%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$39,139,782	$41,667,808	$47,833,504	$48,069,056	$58,532,154	8%	22%	8%
9605	Toilet Sets for Personal Travel	$1,460,644	$2,090,319	$1,015,166	$1,052,074	$1,251,122	-3%	23%	0%
9619	Diapers and Fem Hygiene	NA	NA	$48,824,781	$60,718,056	$45,701,927	NA	-6%	6%
	Total Imports	$680,160,996	$710,353,667	$721,083,668	$791,691,428	$777,429,177	3%	8%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

India Personal Care and Cosmetics Trade
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Table 3: India Imports of Personal Care and Cosmetics Products from the U.S.

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$9,204,644	$9,189,900	$7,582,288	$10,553,429	$10,963,401	4%	45%	20%
330290	Fragrances & Substances Used as Inputs	$1,984,383	$2,003,071	$1,858,130	$2,302,108	$2,041,554	1%	10%	4%
3303	Perfumes And Toilet Waters	$5,692,101	$10,182,706	$5,998,207	$8,087,739	$9,308,849	10%	55%	17%
3304	Make-Up & Skin-Care Preparations	$12,378,347	$12,760,731	$13,024,691	$15,799,945	$12,645,095	0%	-3%	24%
3305	Hair Care Products	$1,433,516	$1,244,424	$1,864,194	$2,221,534	$2,747,003	14%	47%	5%
3306	Oral & Dental Hygiene	$2,385,974	$1,524,690	$1,360,082	$1,615,944	$1,643,878	-7%	21%	3%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$7,101,639	$6,236,738	$5,503,940	$5,366,082	$4,576,722	-8%	-17%	9%
3401	Soap & Other Products to Wash the Skin	$2,984,786	$1,604,793	$1,854,784	$1,789,240	$1,128,017	-18%	-39%	2%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$38,718	$32,726	$118,992	$79,503	$25,731	-8%	-78%	0%
4818	Personal Care Wipes, Diapers, Tampons	$2,556,398	$2,036,527	$1,567,905	$2,995,457	$763,754	-21%	-51%	1%
5601	Sanitary Towels and Napkins	$2,208,569	$648,787	$1,457,262	$2,248,830	$4,164,519	14%	186%	8%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$3,810,761	$4,940,355	$6,305,591	$1,965,120	$3,036,280	-4%	-52%	6%
9605	Toilet Sets for Personal Travel	$52,832	$25,200	$16,000	$0	$3,400	-42%	-79%	0%
9619	Diapers and Fem Hygiene	$0	$904,124	$571,969	$611,346	$723,144	-5%	26%	1%
	Total Imports	$51,832,668	$53,334,772	$49,084,035	$55,636,277	$53,771,347	0%	10%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

India Personal Care and Cosmetics Trade
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Table 4: India's Imports of Personal Care and Cosmetics Products from Japan

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$21,086	$21,535	$17,614	$23,777	$15,776	-6%	-10%	0%
330290	Fragrances & Substances Used as Inputs	$45,161	$11,137	$51,788	$74,704	$1,259,731	95%	2332%	13%
3303	Perfumes And Toilet Waters	$3,140	NA	NA	NA	$3,628	3%	NA	0%
3304	Make-Up & Skin-Care Preparations	$175,095	$347,485	$299,773	$203,799	$222,500	5%	-26%	2%
3305	Hair Care Products	$1,878,680	$435,192	$340,084	$273,233	$84,516	-46%	-75%	1%
3306	Oral & Dental Hygiene	$6,719	$12,265	$12,266	$106,942	$64,294	57%	424%	1%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$592,975	$939,263	$507,877	$291,335	$66,426	-35%	-87%	1%
3401	Soap & Other Products to Wash the Skin	$142,793	$227,305	$91,156	$73,561	$64,550	-15%	-29%	1%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$712,987	$348,851	$246,878	$235,877	$317,437	-15%	29%	3%
4818	Personal Care Wipes, Diapers, Tampons	$17,526,267	$985,065	$475,097	$44,439	$329,039	-55%	-31%	3%
5601	Sanitary Towels and Napkins	$378,748	$510,547	$1,863,735	$2,104,344	$2,297,309	43%	23%	23%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$312,839	$601,813	$360,691	$359,297	$382,086	4%	6%	4%
9605	Toilet Sets for Personal Travel	NA	$18,677,747	$20,218,692	$7,098,388	$531,532	NA	-97%	5%
9619	Diapers and Fem Hygiene	$21,751,329	$23,107,068	$24,433,863	$10,814,992	$4,379,093	NA	NA	44%
	Total Imports	$43,547,819	$46,225,273	$48,919,514	$21,704,688	$10,017,917	-32%	-80%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 5: India's Imports of Personal Care and Cosmetics Products from the EU 28

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$15,975,949	$14,821,475	$16,675,739	$19,556,516	$18,140,596	3%	9%	9%
330290	Fragrances & Substances Used as Inputs	$31,175,318	$32,519,039	$34,913,024	$38,244,283	$38,670,285	4%	11%	19%
3303	Perfumes And Toilet Waters	$42,626,995	$39,804,898	$45,101,089	$48,106,028	$45,767,433	1%	1%	22%
3304	Make-Up & Skin-Care Preparations	$35,227,959	$36,049,909	$41,743,743	$39,720,812	$39,037,105	2%	-6%	19%
3305	Hair Care Products	$12,100,215	$11,561,038	$13,979,495	$12,894,113	$12,950,760	1%	-7%	6%
3306	Oral & Dental Hygiene	$681,503	$1,175,715	$909,710	$557,562	$407,820	-10%	-55%	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$18,724,385	$19,538,323	$14,535,478	$15,541,344	$12,983,963	-7%	-11%	6%
3401	Soap & Other Products to Wash the Skin	$6,578,583	$5,371,915	$5,866,152	$6,855,011	$6,626,736	0%	13%	3%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$838,468	$1,983,663	$1,973,095	$1,185,179	$461,782	-11%	-77%	0%
4818	Personal Care Wipes, Diapers, Tampons	$5,624,415	$1,229,127	$2,670,127	$2,510,242	$3,702,357	-8%	39%	2%
5601	Sanitary Towels and Napkins	$10,974,541	$12,119,995	$12,417,317	$12,636,090	$17,028,486	9%	37%	8%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$7,978,035	$6,275,239	$8,680,218	$7,422,826	$7,635,068	-1%	-12%	4%
9605	Toilet Sets for Personal Travel	$233,835	$369,364	$370,704	$404,430	$281,647	4%	NA	0%
9619	Diapers and Fem Hygiene	$0	$2,578,899	$3,231,340	$4,162,902	$3,159,434	NA	NA	2%
	Total Imports	$188,740,201	$185,398,599	$203,067,231	$209,797,338	$206,853,472	2%	2%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 6: India's Imports of Personal Care and Cosmetics Products from France

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$4,632,709	$5,920,948	$6,968,319	$7,442,917	$7,309,090	10%	5%	14%
330290	Fragrances & Substances Used as Inputs	$14,504,069	$14,191,934	$15,712,797	$17,176,218	$17,394,718	4%	11%	34%
3303	Perfumes And Toilet Waters	$11,035,156	$12,974,855	$12,413,179	$13,447,038	$13,534,996	4%	9%	27%
3304	Make-Up & Skin-Care Preparations	$9,031,599	$9,941,105	$11,057,261	$11,539,375	$8,633,087	-1%	-22%	17%
3305	Hair Care Products	$777,662	$934,080	$1,257,585	$636,503	$1,069,662	7%	-15%	2%
3306	Oral & Dental Hygiene	$32,774	$42,481	$252,995	$13,958	$28,917	-2%	-89%	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$1,974,725	$1,003,303	$1,072,571	$2,479,999	$1,836,640	-1%	71%	4%
3401	Soap & Other Products to Wash the Skin	$297,660	$892,246	$903,756	$1,131,973	$488,671	10%	-46%	1%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$113,885	$146,544	$356,425	$123,420	$142,239	5%	-60%	0%
4818	Personal Care Wipes, Diapers, Tampons	$125,699	$48,607	$54,478	$70,378	$28,515	-26%	-48%	0%
5601	Sanitary Towels and Napkins	$151,918	$235,837	$169,407	$69,484	$23,522	-31%	-86%	0%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$178,086	$35,800	$120,703	$79,800	$166,037	-1%	38%	0%
9605	Toilet Sets for Personal Travel	$27,800	$8,889	$7,978	$7,593	$4,984	-29%	-38%	0%
9619	Diapers and Fem Hygiene	$0	$9,950	$11,421	$0	$2	NA	NA	0%
	Total Imports	$42,883,742	$46,386,579	$50,358,875	$54,218,656	$50,661,080	3%	1%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 7: India's Imports of Personal Care and Cosmetics Products from China

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$15,266,097	$12,051,741	$29,908,139	$67,184,804	$34,556,798	18%	16%	15%
330290	Fragrances & Substances Used as Inputs	$2,650,722	$2,883,216	$4,240,660	$3,363,514	$7,442,375	23%	76%	3%
3303	Perfumes And Toilet Waters	$13,606	$15,000	NA	NA	$48,672	29%	NA	0%
3304	Make-Up & Skin-Care Preparations	$13,961,186	$11,601,721	$12,532,960	$12,218,242	$16,112,151	3%	29%	7%
3305	Hair Care Products	$4,349,187	$3,780,373	$3,993,539	$3,360,753	$3,551,126	-4%	-11%	2%
3306	Oral & Dental Hygiene	$90,436	$108,535	$5,454,032	$4,241,741	$1,111,294	65%	-80%	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$13,175,390	$16,414,741	$18,838,368	$19,824,807	$31,200,996	19%	66%	13%
3401	Soap & Other Products to Wash the Skin	$2,459,631	$2,881,666	$3,507,653	$2,757,000	$2,298,124	-1%	-34%	1%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$17,355	$85,355	$544,231	$1,047,127	$1,359,040	139%	150%	1%
4818	Personal Care Wipes, Diapers, Tampons	$26,056,695	$9,301,727	$14,388,906	$18,660,760	$16,866,292	-8%	17%	7%
5601	Sanitary Towels and Napkins	$8,569,494	$685,790	$1,612,391	$1,007,292	$2,435,290	-22%	51%	1%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$44,171,948	$48,124,704	$62,326,367	$87,819,265	$88,542,887	15%	42%	38%
9605	Toilet Sets for Personal Travel	$760,122	$456,763	$1,226,608	$623,021	$725,179	-1%	-41%	0%
9619	Diapers and Fem Hygiene	$0	$41,342,798	$25,432,757	$34,434,583	$26,642,469	NA	5%	11%
	Total Imports	$131,541,869	$149,734,130	$184,006,611	$256,542,909	$232,892,693	12%	27%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 1: Imported Products Share of India's Personal Care and Cosmetics Market

Importer	2011	% Market Share	2012	% Market Share	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	$51,832,668	8%	$ 53,334,772	8%	$49,084,035	7%	$55,636,277	7%	$53,771,347	7%
France	$42,883,742	6%	$ 46,386,579	7%	$50,358,875	7%	$54,218,656	7%	$50,661,080	7%
Japan	$43,547,819	6%	$ 46,225,273	7%	$48,919,514	7%	$21,704,688	3%	$10,017,917	1%
EU 28	$188,740,201	28%	$ 185,398,599	26%	$203,067,231	28%	$209,797,338	26%	$206,853,472	27%
China	$131,541,869	19%	$ 149,734,130	21%	$184,006,611	26%	$256,542,909	32%	$232,892,693	30%
Other	$221,614,697	33%	$ 229,274,314	32%	$185,647,402	26%	$193,791,560	24%	$223,232,668	29%
Total	$680,160,996	100%	$ 710,353,667	100%	$721,083,668	100%	$791,691,428	100%	$777,429,177	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

India Personal Care and Cosmetics Trade
2011-2015

Table 8: HS 34: Make Up Products, US Exports to India

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to India
3304	Make-Up & Skin-Care Preparations	$12,378,347	$12,760,731	$13,024,691	$15,799,945	$12,645,095	-3%	0%	24%
330410	Lipstick, other prep	$807,546	$1,494,640	$1,520,747	$1,403,252	$1,173,117	-23%	8%	2%
330420	Eye Make-Up	$438,058	$374,167	$1,964,092	$221,085	$315,926	-84%	-6%	1%
330430	Manicure & Pedicure Preparations	$1,342,209	$1,111,045	$470,982	$743,055	$757,930	38%	-11%	1%
330491	Powder Make-Up Or Skin Care Preparations	$379,825	$616,666	$468,649	$305,884	$247,888	-47%	-8%	0%
330499	Beauty & Skin Care Prep	$9,410,709	$9,164,213	$8,600,221	$13,126,669	$10,150,234	18%	2%	19%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 9: HS 35: Hair Care Products, US Exports to India

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to India
3305	Hair Care Products	$1,433,516	$1,244,424	$1,864,194	$2,221,534	$2,747,003	47%	14%	5%
330510	Shampoo	$571,990	$562,527	$539,049	$648,910	$641,369	19%	2%	1%
330520	Prep for Waiving and Straightening Hair	$8,715	$19,645	$5,280	$4,050	$69,052	1208%	51%	0%
330530	Hair Lacquer	$232,543	$16,642	$58,098	$26,521	$46,225	-20%	-28%	0%
330590	Other Hair Products, inc. Color	$620,268	$645,610	$1,261,767	$1,542,053	$1,990,357	58%	26%	4%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

India Personal Care and Cosmetics Trade
2011-2015

Table 10: HS 37: Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants, US Exports to India

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to India
3307*	Cosmetic & Toilet Prep	$5,955,620	$5,281,798	$5,322,397	$4,933,939	$4,112,423	10%	-7%	8%
330710	Shaving Preparations	$400,538	$17,640	$14,528	$0	$102,359	10%	-24%	0%
330720	Personal Deodorants and Antiperspirants	$2,248,144	$1,824,187	$2,394,831	$1,731,124	$342,745	10%	-31%	1%
330730	Perfumed Bath Salts And Other Bath	$10,320	$14,160	$16,326	$36,264	$9,720	10%	-1%	0%
330790	Depilatories, Other Perfumery	$3,296,618	$3,425,811	$2,896,712	$3,166,551	$3,657,599	10%	2%	7%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Note the total for 3307 includes 330741 and 330749, which are not provided here as they are not directly related to personal care.

Malaysia Personal Care and Cosmetics Trade
2011-2015

Table 1:Malaysia Total Personal Care and Cosmetics Imports

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Imports
3301	Essential Oils	$13,359,112	$14,752,252	$16,275,132	$19,908,867	$19,482,308	8%	20%	2%
330290	Fragrances & Substances Used as Inputs	$57,359,546	$64,813,373	$71,731,889	$79,833,951	$70,858,721	4%	-1%	6%
3303	Perfumes And Toilet Waters	$106,284,575	$98,035,012	$94,675,338	$100,810,979	$87,010,086	-4%	-8%	8%
3304	Make-Up & Skin-Care Preparations	$321,375,374	$310,411,726	$294,796,700	$292,996,168	$291,888,088	-2%	-1%	26%
3305	Hair Care Products	$105,665,687	$123,821,502	$122,863,893	$104,811,273	$93,617,158	-2%	-24%	8%
3306	Oral & Dental Hygiene	$75,210,228	$86,478,121	$82,366,124	$90,271,076	$78,483,828	1%	-5%	7%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$108,525,534	$103,955,136	$109,440,248	$115,146,743	$108,757,686	0%	-1%	10%
3401	Soap & Other Products to Wash the Skin	$95,433,514	$99,497,854	$101,896,175	$108,839,692	$103,507,300	2%	2%	9%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$38,054,019	$40,376,342	$44,625,538	$45,762,794	$50,029,282	6%	12%	4%
4818	Personal Care Wipes, Diapers, Tampons	$119,971,650	$133,361,903	$32,693,619	$33,853,854	$31,021,045	-24%	-5%	3%
5601	Sanitary Towels and Napkins	$26,331,943	$33,046,560	$29,523,585	$32,105,595	$32,262,989	4%	9%	3%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$46,590,320	$51,831,248	$43,959,100	$43,988,159	$57,040,585	4%	30%	5%
9605	Toilet Sets for Personal Travel	$2,333,348	$3,358,792	$4,752,439	$4,629,647	$4,617,055	15%	-3%	0%
9619	Diapers and Fem Hygiene	NA	NA	$108,072,458	$103,705,193	$96,483,874	NA	-11%	9%
	Total Imports	$1,116,494,850	$1,163,739,821	$1,157,672,238	$1,176,663,991	$1,125,060,005	0%	-3%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Malaysia Personal Care and Cosmetics Trade
2011-2015

Table 2: Malaysia Imports of Personal Care and Cosmetics Products from the U.S.

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$1,029,985	$684,402	$1,654,520	$2,698,375	$5,540,918	40%	235%	7%
330290	Fragrances & Substances Used as Inputs	$1,613,737	$3,632,653	$3,189,251	$3,355,502	$7,211,623	35%	126%	9%
3303	Perfumes And Toilet Waters	$2,479,863	$2,983,208	$2,559,798	$2,902,440	$2,665,513	1%	4%	3%
3304	Make-Up & Skin-Care Preparations	$21,824,433	$25,332,047	$26,436,419	$32,791,945	$32,375,499	8%	22%	41%
3305	Hair Care Products	$4,008,816	$3,503,896	$5,416,150	$6,004,291	$6,025,084	8%	11%	8%
3306	Oral & Dental Hygiene	$655,107	$848,434	$892,481	$1,990,947	$1,359,640	16%	52%	2%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$6,190,898	$8,333,563	$9,853,545	$7,622,379	$11,832,304	14%	20%	15%
3401	Soap & Other Products to Wash the Skin	$6,160,530	$6,388,131	$8,630,701	$9,176,555	$7,228,988	3%	-16%	9%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$50,211	$72,009	$363,156	$127,298	$28,812	-11%	-92%	0%
4818	Personal Care Wipes, Diapers, Tampons	$3,586,712	$1,132,016	$1,124,104	$1,424,169	$1,297,165	-18%	15%	2%
5601	Sanitary Towels and Napkins	$59,651	$4,462	$134,378	$216,752	$634,430	60%	372%	1%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$1,974,495	$1,517,364	$2,057,623	$1,958,278	$1,671,338	-3%	-19%	2%
9605	Toilet Sets for Personal Travel	$3,000	$3,000	NA	$10,800	NA	NA	NA	NA
9619	Diapers and Fem Hygiene	NA	$958,566	$986,507	$842,948	$1,046,684	2%	6%	1%
	Total Imports	$49,637,438	$55,393,751	$63,298,633	$71,122,679	$78,917,998	9%	25%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Malaysia Personal Care and Cosmetics Trade
2011-2015

Table 3: Malaysia's Imports of Personal Care and Cosmetics Products from China

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$1,205,392	$1,144,695	$22,147,139	$59,954,772	$114,128,812	148%	415%	31%
330290	Fragrances & Substances Used as Inputs	$1,035,748	$752,636	$1,079,028	$787,386	$1,010,555	0%	-6%	0%
3303	Perfumes And Toilet Waters	$1,197,611	$1,437,517	$1,108,521	$1,108,808	$1,034,144	-3%	-7%	0%
3304	Make-Up & Skin-Care Preparations	$10,974,966	$12,227,532	$14,618,909	$14,157,632	$16,796,733	9%	15%	5%
3305	Hair Care Products	$2,678,016	$5,769,393	$6,915,632	$5,437,644	$4,893,512	13%	-29%	1%
3306	Oral & Dental Hygiene	$2,556,786	$1,700,018	$3,119,170	$5,351,860	$5,699,387	17%	83%	2%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$31,757,218	$39,844,604	$55,312,752	$46,869,841	$52,836,013	11%	-4%	15%
3401	Soap & Other Products to Wash the Skin	$5,117,817	$6,194,293	$10,463,677	$6,946,350	$6,363,832	4%	-39%	2%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$1,456,633	$1,291,499	$4,596,281	$11,334,911	$13,072,543	55%	184%	4%
4818	Personal Care Wipes, Diapers, Tampons	$8,959,494	$4,383,389	$32,673,175	$46,162,263	$37,781,657	33%	16%	10%
5601	Sanitary Towels and Napkins	$3,077,380	$2,329,267	$8,359,090	$4,166,003	$8,401,981	22%	1%	2%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$40,640,632	$48,478,539	$66,190,194	$71,611,295	$73,172,539	12%	11%	20%
9605	Toilet Sets for Personal Travel	$836,254	$4,777,483	$9,049,555	$6,898,949	$4,690,269	41%	-48%	1%
9619	Diapers and Fem Hygiene	$0	$14,650,543	$26,255,267	$37,414,653	$23,038,311	NA	-12%	6%
	Total Imports	$111,493,947	$144,981,408	$261,888,390	$318,202,367	$362,920,288	27%	39%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Malaysia Personal Care and Cosmetics Trade
2011-2015

Table 4: Malaysia's Imports of Personal Care and Cosmetics Products from Japan

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	NA	NA	NA	NA	$30,246	NA	NA	0%
330290	Fragrances & Substances Used as Inputs	$1,035,748	$752,636	$1,079,028	$787,386	$1,010,555	0%	-6%	3%
3303	Perfumes And Toilet Waters	$5,802	$86,279	$49,954	$45,440	$3,264	-11%	-93%	0%
3304	Make-Up & Skin-Care Preparations	$14,905,953	$14,776,361	$12,232,532	$11,075,931	$9,288,728	-9%	-24%	28%
3305	Hair Care Products	$7,149,349	$7,974,816	$5,477,414	$7,055,290	$6,215,594	-3%	13%	18%
3306	Oral & Dental Hygiene	$15,636	$12,941	$10,667	$13,560	$49,212	26%	361%	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$961,751	$1,044,647	$897,166	$947,218	$1,130,482	3%	26%	3%
3401	Soap & Other Products to Wash the Skin	$1,618,940	$1,857,166	$1,493,443	$1,311,378	$1,310,984	-4%	-12%	4%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$124,596	$241,362	$142,114	$121,900	$213,831	11%	50%	1%
4818	Personal Care Wipes, Diapers, Tampons	$3,657,117	$2,304,485	$2,492,208	$2,792,777	$2,544,428	-7%	2%	8%
5601	Sanitary Towels and Napkins	$3,524,283	$6,124,089	$6,451,924	$6,297,896	$6,650,727	14%	3%	20%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$2,372,102	$2,636,173	$1,530,814	$1,011,487	$1,511,130	-9%	-1%	4%
9605	Toilet Sets for Personal Travel	$7,472	$4,873	NA	NA	NA	NA	NA	NA
9619	Diapers and Fem Hygiene	$0	$879,981	$653,885	$2,955,687	$3,668,158	NA	NA	11%
	Total Imports	$35,378,749	$38,695,809	$32,511,149	$34,415,950	$33,627,339	-3%	3%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Malaysia Personal Care and Cosmetics Trade
2011-2015

Table 5: Malaysia's Imports of Personal Care and Cosmetics Products from France

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$232,765	$30,523	$363,093	$143,829	$105,397	-15%	-71%	0%
330290	Fragrances & Substances Used as Inputs	$57,359,546	$64,813,373	$71,731,889	$79,833,951	$70,858,721	4%	-1%	64%
3303	Perfumes And Toilet Waters	$2,253,011	$2,378,437	$3,633,179	$3,114,888	$3,234,842	8%	-11%	3%
3304	Make-Up & Skin-Care Preparations	$15,811,847	$17,038,423	$19,112,902	$22,495,719	$14,014,941	-2%	-27%	13%
3305	Hair Care Products	$214,177	$869,204	$904,392	$664,295	$637,457	24%	-30%	1%
3306	Oral & Dental Hygiene	$831	$0	$1,524	$9,574	$0	-100%	-100%	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$749,432	$1,283,691	$1,045,299	$1,424,406	$926,822	4%	-11%	1%
3401	Soap & Other Products to Wash the Skin	$116,178	$108,206	$399,595	$183,087	$576,291	38%	44%	1%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$497,880	$241,158	$64,103	$215,361	$134,071	-23%	109%	0%
4818	Personal Care Wipes, Diapers, Tampons	$2,936	$2,584	$927	$5,083	$6,430	17%	594%	0%
5601	Sanitary Towels and Napkins	$41,389	$2,284	$5,666	$7,358	$2,684	-42%	-53%	0%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$30,404	$254,699	$110,506	$12,444	$46,168	9%	-58%	0%
9605	Toilet Sets for Personal Travel	NA	$83,218	$87,963	$114,019	$64,823	NA	-26%	0%
9619	Diapers and Fem Hygiene	$19,950,850	$22,292,427	$25,729,149	$28,390,063	$19,749,926	NA	NA	18%
	Total Imports	$97,261,246	$109,398,227	$123,190,187	$136,614,077	$110,358,573	3%	-10%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Malaysia Personal Care and Cosmetics Trade
2011-2015

Table 6: Malaysia's Imports of Personal Care and Cosmetics Products from Thailand

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$249,999	$197,114	$306,260	$290,057	$311,809	NA	NA	0%
330290	Fragrances & Substances Used as Inputs	$3,034,066	$3,859,998	$4,338,412	$5,565,292	$6,055,955	15%	40%	4%
3303	Perfumes And Toilet Waters	$178,331	$68,518	$83,372	$358,952	$349,324	14%	319%	0%
3304	Make-Up & Skin-Care Preparations	$33,915,259	$26,713,829	$27,533,695	$24,418,352	$20,286,627	-10%	-26%	14%
3305	Hair Care Products	$59,824,753	$68,291,258	$65,667,725	$53,769,408	$45,343,467	-5%	-31%	31%
3306	Oral & Dental Hygiene	$28,897,543	$26,454,856	$28,766,124	$25,861,942	$21,052,249	-6%	-27%	14%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$9,873,738	$12,318,352	$16,282,218	$17,776,100	$15,525,596	9%	-5%	11%
3401	Soap & Other Products to Wash the Skin	$17,379,680	$16,170,967	$14,194,612	$12,967,996	$11,977,426	-7%	-16%	8%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$2,076,690	$1,103,534	$24,212	$40,077	$69,409	-49%	187%	0%
4818	Personal Care Wipes, Diapers, Tampons	$41,816,114	$950,816	$884,357	$1,055,192	$898,595	-54%	2%	1%
5601	Sanitary Towels and Napkins	$2,640,553	$342,966	$531,974	$632,158	$831,391	-21%	56%	1%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$1,448,174	$1,494,127	$1,308,801	$1,490,102	$1,203,360	-4%	-8%	1%
9605	Toilet Sets for Personal Travel	$49,239	$87,788	$67,479	$36,769	$101,115	NA	NA	0%
9619	Diapers and Fem Hygiene	$0	$41,253,573	$35,193,681	$26,368,920	$22,042,447	NA	NA	15%
	Total Imports	$201,384,139	$199,307,696	$195,182,922	$170,631,317	$146,048,770	-7%	-25%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Malaysia Personal Care and Cosmetics Trade
2011-2015

Table 7: Malaysia's Imports of Personal Care and Cosmetics Products from South Korea

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$3,485	$2,122	$4,195	$3,111	$8,920	21%	113%	0%
330290	Fragrances & Substances Used as Inputs	$225,581	$311,744	$440,063	$475,474	NA	NA	NA	NA
3303	Perfumes And Toilet Waters	$71,266	$126,776	$88,485	$73,425	$211,366	24%	139%	0%
3304	Make-Up & Skin-Care Preparations	$26,441,774	$28,201,375	$32,758,934	$35,528,939	$35,896,063	6%	10%	57%
3305	Hair Care Products	$2,619,371	$3,054,081	$2,748,088	$3,546,659	$2,682,021	0%	-2%	4%
3306	Oral & Dental Hygiene	$1,533,229	$1,760,976	$1,516,100	$1,794,373	$931,625	-9%	-39%	1%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$2,186,617	$6,650,741	$3,829,234	$5,788,285	$5,592,047	21%	46%	9%
3401	Soap & Other Products to Wash the Skin	$1,650,788	$2,074,788	$1,580,605	$2,874,413	$5,313,693	26%	236%	8%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$347,159	$99,336	$72,813	$92,330	$124,232	-19%	71%	0%
4818	Personal Care Wipes, Diapers, Tampons	$468,599	$221,814	$419,314	$295,621	$3,975,213	53%	848%	6%
5601	Sanitary Towels and Napkins	$446,886	$405,826	$680,866	$636,469	$873,733	14%	28%	1%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$816,347	$838,266	$760,547	$860,316	$2,902,065	29%	282%	5%
9605	Toilet Sets for Personal Travel	$2,245	NA	NA	$1,573	$6,899	NA	NA	0%
9619	Diapers and Fem Hygiene	NA	$80,117	$236,672	$4,741,207	$4,682,639	NA	1879%	7%
	Total Imports	$36,813,347	$43,827,962	$45,135,916	$56,712,195	$63,200,516	10%	40%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Malaysia Personal Care and Cosmetics Trade
2011-2015

Table 8: Malaysia's Imports of Personal Care and Cosmetics Products from EU 28

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$1,253,724	$1,246,028	$1,573,671	$1,202,371	$1,283,047	0%	-18%	1%
330290	Fragrances & Substances Used as Inputs	$9,625,989	$10,810,318	$11,582,196	$9,302,042	$8,768,882	-2%	-24%	9%
3303	Perfumes And Toilet Waters	$23,599,569	$21,038,017	$18,682,833	$20,185,758	$17,985,388	-5%	-4%	18%
3304	Make-Up & Skin-Care Preparations	$36,368,571	$39,075,949	$41,379,386	$45,260,117	$40,301,869	2%	-3%	41%
3305	Hair Care Products	$8,382,318	$9,443,253	$9,358,924	$9,507,298	$8,790,846	1%	-6%	9%
3306	Oral & Dental Hygiene	$3,752,729	$6,883,220	$4,946,184	$8,981,539	$5,846,602	9%	18%	6%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$13,476,470	$8,661,638	$6,578,070	$6,193,858	$5,206,144	-17%	-21%	5%
3401	Soap & Other Products to Wash the Skin	$4,726,926	$3,784,406	$4,439,526	$5,005,545	$4,462,918	-1%	1%	4%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$781,801	$966,283	$1,184,282	$1,066,190	$487,985	-9%	-59%	0%
4818	Personal Care Wipes, Diapers, Tampons	$1,507,302	$654,197	$905,925	$945,505	$612,856	-16%	-32%	1%
5601	Sanitary Towels and Napkins	$5,863,458	$7,237,336	$2,175,184	$2,238,886	$1,835,512	-21%	-16%	2%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$2,474,846	$2,425,650	$2,064,898	$2,449,496	$1,790,727	-6%	-13%	2%
9605	Toilet Sets for Personal Travel	NA	$19,322	$51,996	$57,621	$23,305	NA	-55%	0%
9619	Diapers and Fem Hygiene	NA	$1,083,480	$1,375,677	$2,483,171	$1,851,263	NA	35%	2%
	Total Imports	$111,813,703	$113,329,097	$106,298,752	$114,879,397	$99,247,344	-2%	-7%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Malaysia Personal Care and Cosmetics Trade
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Table 9: Imported Products Share of Malaysia's Personal Care and Cosmetics Market

Importer	2011	% Market Share	2012	% Market Share	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	$49,637,438	4%	$55,393,751	5%	$63,298,633	5%	$71,122,679	6%	$78,917,998	7%
France	$97,261,246	9%	$109,398,227	9%	$123,190,187	11%	$136,614,077	12%	$110,358,573	10%
Japan	$35,378,749	3%	$38,695,809	3%	$32,511,149	3%	$34,415,950	3%	$33,627,339	3%
EU 28	$111,813,703	10%	$113,329,097	10%	$106,298,752	9%	$114,879,397	10%	$99,247,344	9%
China	$111,493,947	10%	$144,981,408	12%	$261,888,390	23%	$318,202,367	27%	$362,920,288	32%
Thailand	$201,384,139	18%	$199,307,696	17%	$195,182,922	17%	$26,368,920	2%	$146,048,770	13%
South Korea	$36,813,347	3%	$43,827,962	4%	$45,135,916	4%	$56,712,195	5%	$63,200,516	6%
Other	$375,451,035	34%	$349,407,644	30%	$206,976,102	18%	$281,734,329	24%	$120,380,604	11%
Total	$1,116,494,850	100%	$1,163,739,821	100%	$1,157,672,238	100%	$1,176,663,991	100%	$1,125,060,005	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 10: HS 34: Make Up Products, US Exports to Malaysia

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to M
3304	Make-Up & Skin-Care Preparations	$21,824,433	$25,332,047	$26,436,419	$32,791,945	$32,375,499	22%	8%	41%
330410	Lipstick, other prep	$1,342,066	$1,077,112	$1,293,669	$1,258,090	$1,197,281	-7%	-2%	2%
330420	Eye Make-Up	$387,396	$678,384	$945,617	$1,129,680	$825,500	-13%	16%	1%
330430	Manicure & Pedicure Preparations	$1,687,487	$1,057,817	$1,479,900	$940,084	$363,064	-308%	-26%	0%
330491	Powder Make-Up Or Skin Care Preparations	$220,262	$1,667,459	$457,663	$1,349,555	$708,636	55%	26%	1%
330499	Beauty & Skin Care Prep	$18,187,222	$20,851,275	$22,259,570	$28,114,536	$29,281,018	32%	10%	37%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 11: HS 35: Hair Care Products, US Exports to Malaysia

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to M
3305	Hair Care Products	$4,008,816	$3,503,896	$5,416,150	$6,004,291	$6,025,084	11%	8%	8%
330510	Shampoo	$15,977,185	$15,083,079	$16,588,638	$17,075,991	$15,770,682	-5%	0%	3%
330520	Prep for Waiving and Straightening Hair	$1,864,879	$810,333	$1,060,160	$3,604,965	$918,811	-13%	-13%	0%
330530	Hair Lacquer	$2,128,836	$1,864,879	$1,416,751	$1,083,927	$1,481,161	5%	-7%	0%
330590	Other Hair Products, inc. Color	$31,934,085	$28,888,226	$27,213,790	$30,848,008	$36,044,350	32%	2%	7%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 12: HS 37: Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants, US Exports to Malaysia

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to M
3307	Cosmetic & Toilet Prep	$5,741,787	$7,835,442	$8,891,821	$6,824,808	$11,408,062	10%	15%	14%
330710	Shaving Preparations	$6,822	$16,709	$0	$16,379	$2,063,029	10%	213%	3%
330720	Personal Deodorants and Antiperspirants	$554,913	$566,839	$450,028	$473,315	$336,306	10%	-10%	0%
330730	Perfumed Bath Salts And Other Bath	$81,550	$25,019	$70,555	$178,386	$188,295	10%	18%	0%
330790	Depilatories, Other Perfumery	$5,098,502	$7,226,875	$8,371,238	$6,156,728	$8,820,432	10%	12%	11%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 1:New Zealand Total Personal Care and Cosmetics Imports

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Imports
3301	Essential Oils	$6,846,215	$5,597,217	$6,094,011	$5,745,009	$5,807,315	-3%	-5%	1%
330290	Fragrances & Substances Used as Inputs	$5,034,075	$4,215,871	$3,073,045	$4,401,447	$4,297,958	-3%	40%	1%
3303	Perfumes And Toilet Waters	$46,948,588	$46,814,950	$45,272,081	$47,064,879	$44,247,194	-1%	-2%	8%
3304	Make-Up & Skin-Care Preparations	$125,179,893	$129,392,174	$135,601,162	$141,123,849	$136,777,266	2%	1%	24%
3305	Hair Care Products	$73,270,150	$74,273,831	$77,530,362	$73,408,175	$62,983,632	-3%	-19%	11%
3306	Oral & Dental Hygiene	$24,676,535	$21,401,604	$22,678,497	$25,213,061	$22,672,511	-2%	-0.03%	4%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$44,542,235	$46,874,706	$44,563,599	$40,762,233	$38,617,987	-3%	-13%	7%
3401	Soap & Other Products to Wash the Skin	$45,575,118	$48,171,727	$51,488,420	$53,180,803	$51,381,933	2%	-0.21%	9%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$24,165,399	$21,754,519	$19,474,978	$34,944,773	$32,466,201	6%	67%	6%
4818	Personal Care Wipes, Diapers, Tampons	$147,138,590	$85,058,661	$85,213,828	$73,416,792	$61,706,905	-16%	-28%	11%
5601	Sanitary Towels and Napkins	$10,026,882	$5,077,482	$2,983,849	$3,477,926	$3,685,396	-18%	24%	1%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$20,047,956	$24,892,207	$26,117,355	$29,325,315	$28,800,423	8%	10%	5%
9605	Toilet Sets for Personal Travel	$1,789,193	$2,473,346	$2,068,524	$2,068,524	$3,063,460	11%	48%	1%
9619	Diapers and Fem Hygiene	NA	$77,636,183	$75,949,232	$74,825,856	$68,819,351	-3%	-9%	12%
	Total Imports	$575,240,829	$593,634,478	$598,108,943	$608,958,642	$565,327,532	-0.35%	-5%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

New Zealand Personal Care Cosmetics Trade
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Table 2: New Zealand Imports of Personal Care and Cosmetics Products from the U.S.

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$230,891	$195,302	$119,045	$303,013	$364,125	10%	206%	1%
330290	Fragrances & Substances Used as Inputs	$248,900	$297,038	$229,353	$426,603	$449,620	13%	96%	1%
3303	Perfumes And Toilet Waters	$12,991,003	$12,868,551	$14,086,208	$17,282,712	$14,629,740	2%	4%	31%
3304	Make-Up & Skin-Care Preparations	$15,846,183	$16,546,031	$15,146,395	$15,495,248	$17,746,722	2%	17%	37%
3305	Hair Care Products	$4,130,726	$4,916,467	$4,859,532	$4,702,144	$4,743,488	3%	-2%	10%
3306	Oral & Dental Hygiene	$3,009,139	$2,099,666	$483,865	$417,589	$389,489	-34%	-20%	1%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$3,160,272	$1,697,093	$3,324,048	$2,522,481	$4,193,657	6%	26%	9%
3401	Soap & Other Products to Wash the Skin	$1,700,556	$1,697,093	$3,674,123	$3,227,788	$1,954,851	3%	-47%	4%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$409,900	$290,089	$445,863	$49,002	$75,476	-29%	-83%	0.16%
4818	Personal Care Wipes, Diapers, Tampons	$3,666,706	$2,911,485	$1,512,362	$944,481	$886,961	-25%	-41%	2%
5601	Sanitary Towels and Napkins	$579,711	$565,050	$614,649	$847,026	$698,553	4%	14%	1%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$621,038	$708,532	$935,656	$909,666	$878,958	7%	-6%	2%
9605	Toilet Sets for Personal Travel	$53,835	$38,065	NA	$5,287	NA	NA	NA	NA
9619	Diapers and Fem Hygiene	NA	$2,497,288	$1,738,289	$1,012,821	$865,529	-23%	-50%	2%
	Total Imports	$46,648,860	$47,327,750	$47,169,388	$48,145,861	$47,877,169	0.29%	2%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

New Zealand Personal Care Cosmetics Trade
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Table 3: New Zealand's Imports of Personal Care and Cosmetics Products from China

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$2,020,440	$470,077	$470,077	$291,080	$249,041	-34.21%	-47.02%	0.33%
330290	Fragrances & Substances Used as Inputs	$396,718	$227,011	$96,941	$136,487	$128,533	-20.18%	32.59%	0.17%
3303	Perfumes And Toilet Waters	$1,013,790	$1,000,644	$1,000,644	$1,013,067	$1,002,034	-0.23%	0.14%	1.31%
3304	Make-Up & Skin-Care Preparations	$8,829,289	$9,162,382	$9,162,382	$9,873,214	$8,731,296	-0.22%	-4.70%	11.41%
3305	Hair Care Products	$1,915,986	$1,900,447	$1,900,447	$2,314,455	$2,228,793	3.07%	17.28%	2.91%
3306	Oral & Dental Hygiene	$255,533	$252,176	$252,176	$942,256	$526,498	15.56%	108.78%	0.69%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$5,513,816	$7,064,540	$7,064,540	$5,462,576	$5,371,823	-0.52%	-23.96%	7.02%
3401	Soap & Other Products to Wash the Skin	$9,761,101	$10,921,618	$10,921,618	$14,277,007	$14,357,144	8.02%	31.46%	18.77%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$6,163,221	$6,696,829	$6,696,829	$9,570,906	$10,286,299	10.79%	53.60%	13.45%
4818	Personal Care Wipes, Diapers, Tampons	$12,899,427	$10,130,271	$10,962,400	$12,731,435	$12,952,474	0.08%	18.15%	16.93%
5601	Sanitary Towels and Napkins	$1,158,256	$994,081	$994,081	$809,557	$784,264	-7.50%	-21.11%	1.03%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$10,205,888	$13,313,977	$13,313,977	$16,010,264	$16,938,600	10.66%	27.22%	22.14%
9605	Toilet Sets for Personal Travel	$1,623,696	$2,337,199	$2,337,199	$1,806,184	$2,936,449	12.58%	25.64%	3.84%
9619	Diapers and Fem Hygiene	NA	NA	$5,227,240	$5,000,000	$5,153,827	NA	-1.40%	6.74%
	Total Imports	$61,757,161	$64,471,252	$65,173,311	$80,238,488	$76,493,248	4.37%	17.37%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 4: New Zealand's Imports of Personal Care and Cosmetics Products from Japan

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$12,331	$4,147	$4,714	$2,888	$1,823	-31.77%	-61.33%	0.04%
330290	Fragrances & Substances Used as Inputs	$13,419	$13,879	$96,941	$241,633	$128,533	57.13%	32.59%	2.49%
3303	Perfumes And Toilet Waters	$730	NA	$1,562	$4,785	$937	5.12%	-40.01%	0.02%
3304	Make-Up & Skin-Care Preparations	$1,681,810	$1,762,359	$2,182,022	$2,428,193	$2,691,434	9.86%	23.35%	52.18%
3305	Hair Care Products	$69,262	$155,991	$115,680	$138,981	$106,328	8.95%	-8.08%	2.06%
3306	Oral & Dental Hygiene	$506,036	$255,300	$474,600	$199,620	$501,294	-0.19%	5.62%	9.72%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$21,312	$41,358	$31,062	$74,647	$19,125	-2.14%	-38.43%	0.37%
3401	Soap & Other Products to Wash the Skin	$44,042	$62,709	$175,619	$217,871	$134,446	25.01%	-23.44%	2.61%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$1,057	$558	$286	$308	$1,744	10.53%	509.79%	0.03%
4818	Personal Care Wipes, Diapers, Tampons	$393,253	$38,995	$133,032	$291,198	$98,474	-24.19%	-25.98%	1.91%
5601	Sanitary Towels and Napkins	$5,085	$860	$6,101	$5,946	$6,027	3.46%	-1.21%	0.12%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$478,295	$533,852	$436,762	$530,875	$536,470	2.32%	22.83%	10.40%
9605	Toilet Sets for Personal Travel	$850	$6,507	$10,813	$4,782	$2,699	26.00%	-75.04%	0.05%
9619	Diapers and Fem Hygiene	NA	$394,561	$389,773	$389,733	$928,988	23.87%	138.34%	18.01%
	Total Imports	$3,227,482	$3,271,076	$4,058,967	$4,531,460	$5,158,322	12.06%	27.08%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 5: New Zealand's Imports of Personal Care and Cosmetics Products from France

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$739,092	$609,986	$811,719	$923,717	$444,290	-10%	-45%	1%
330290	Fragrances & Substances Used as Inputs	$74,152	$59,563	$72,508	$57,239	$80,556	2%	11%	0%
3303	Perfumes And Toilet Waters	$23,587,976	$22,936,257	$20,941,368	$21,650,360	$19,177,106	-4%	-8%	46%
3304	Make-Up & Skin-Care Preparations	$19,067,861	$17,146,227	$17,725,480	$16,259,156	$13,568,634	-7%	-23%	33%
3305	Hair Care Products	$2,090,902	$2,710,077	$2,603,613	$1,949,114	$1,402,379	-8%	-46%	3%
3306	Oral & Dental Hygiene	$7,786	$56,436	$102,780	$5,578	$10,421	6%	-90%	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$959,687	$1,345,853	$1,212,584	$1,057,962	$944,651	0%	-22%	2%
3401	Soap & Other Products to Wash the Skin	$720,159	$944,105	$1,229,350	$1,207,929	$798,303	2%	-35%	2%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$430,964	$412,990	$605,773	$620,083	$357,914	-4%	-41%	1%
4818	Personal Care Wipes, Diapers, Tampons	$3,496,691	$374,171	$621,585	$279,305	$101,522	-51%	-84%	0%
5601	Sanitary Towels and Napkins	$747,359	$514,842	$413,543	$466,443	$307,352	-16%	-26%	1%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$100,083	$88,510	$177,572	$84,479	$106,276	1%	-40%	0%
9605	Toilet Sets for Personal Travel	$2,307	NA	$1,458	$297	NA	NA	NA	NA
9619	Diapers and Fem Hygiene	$0	$3,572,709	$3,893,696	$3,966,034	$3,998,343	3%	3%	10%
	Total Imports	$52,025,019	$50,771,726	$50,413,029	$48,527,696	$41,297,747	-5%	-18%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 6: New Zealand's Imports of Personal Care and Cosmetics Products from Thailand

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$4,467	$40,787	$54,348	$45,478	$42,176	56.68%	-22.40%	0.09%
330290	Fragrances & Substances Used as Inputs	$637	$6,897	$39	NA	$996	9.35%	2453.85%	0.00%
3303	Perfumes And Toilet Waters	$17	$259	$352	$1,301	$7,381	236.93%	1996.88%	0.02%
3304	Make-Up & Skin-Care Preparations	$7,691,879	$6,600,469	$8,545,275	$7,834,088	$6,863,688	-2.25%	-19.68%	14.37%
3305	Hair Care Products	$19,381,689	$22,655,624	$23,031,787	$20,831,908	$16,386,024	-3.30%	-28.85%	34.31%
3306	Oral & Dental Hygiene	$5,393,674	$7,286,418	$8,197,896	$10,226,131	$9,848,788	12.80%	20.14%	20.62%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$1,609,377	$1,995,447	$2,252,470	$2,581,034	$2,462,841	8.88%	9.34%	5.16%
3401	Soap & Other Products to Wash the Skin	$7,546,388	$7,704,023	$9,129,182	$8,850,307	$7,945,807	1.04%	-12.96%	16.64%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$14	NA	NA	NA	$220	73.48%	NA	0.00%
4818	Personal Care Wipes, Diapers, Tampons	$3,452,571	$605,124	$808,320	$817,456	$743,668	-26.44%	-8.00%	1.56%
5601	Sanitary Towels and Napkins	$709,723	$633,247	$106,400	$134,813	$162,867	-25.50%	53.07%	0.34%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$644,819	$546,627	$446,101	$606,238	$465,944	-6.29%	4.45%	0.98%
9605	Toilet Sets for Personal Travel	$8,116	$10,907	NA	$6,562	$167	-54.01%	NA	0.00%
9619	Diapers and Fem Hygiene	NA	$3,233,386	$4,018,088	$3,681,770	$2,825,604	-3.31%	-29.68%	5.92%
	Total Imports	$46,443,371	$51,319,215	$56,590,258	$55,617,086	$47,756,171	0.56%	-15.61%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 7: New Zealand's Imports of Personal Care and Cosmetics Products from South Korea

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$5,290	$790	$1,260	$20,533	NA	NA	NA	NA
330290	Fragrances & Substances Used as Inputs	$19	$45	$2,001	$1,112	$5,978	239%	199%	0%
3303	Perfumes And Toilet Waters	$141	$784	$1,007	$593	$15,700	157%	1459%	0%
3304	Make-Up & Skin-Care Preparations	$1,251,587	$1,970,307	$2,718,788	$2,978,816	$2,592,478	16%	-5%	6%
3305	Hair Care Products	$237,270	$237,422	$169,558	$233,853	$291,473	4%	72%	1%
3306	Oral & Dental Hygiene	$38,460	$25,058	$20,024	$28,355	$79,088	16%	295%	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$56,137	$63,087	$64,784	$87,313	$26,332	-14%	-59%	0%
3401	Soap & Other Products to Wash the Skin	$274,089	$307,266	$299,697	$1,953,292	$2,402,398	54%	702%	6%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$162	$16,366	$8,948	$37	$15,570	149%	74%	0%
4818	Personal Care Wipes, Diapers, Tampons	$2,546,543	NA	NA	$344,419	NA	NA	NA	NA
5601	Sanitary Towels and Napkins	$1,941	$1,288	$3,910	$1,788	$12,049	44%	208%	0%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$89,789	$70,719	$110,334	$136,373	$136,774	9%	24%	0%
9605	Toilet Sets for Personal Travel	$644	$314	$207	$344	$70	-36%	-66%	0%
9619	Diapers and Fem Hygiene	NA	$2,635,166	$1,058,544	$513,508	$486,265	NA	-54%	1%
	Total Imports	$4,502,072	$5,328,612	$4,459,062	$6,300,336	$6,064,175	6%	36%	15%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 9: New Zealand's Imports of Personal Care and Cosmetics Products from UK

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$584,213	$625,557	$478,804	$610,304	$730,566	NA	52.58%	1.77%
330290	Fragrances & Substances Used as Inputs	$61,199	$64,337	$42,320	$41,304	$156,541	24.89%	269.90%	0.38%
3303	Perfumes And Toilet Waters	$2,981,159	$3,619,832	$3,158,780	$3,966,212	$3,346,946	2.34%	5.96%	8.10%
3304	Make-Up & Skin-Care Preparations	$6,145,889	$7,871,483	$7,584,588	$9,076,855	$7,925,173	5.22%	4.49%	19.19%
3305	Hair Care Products	$1,696,709	$1,993,350	$2,425,234	$2,506,157	$2,010,852	3.46%	-17.09%	4.87%
3306	Oral & Dental Hygiene	$1,274,238	$2,057,558	$1,618,569	$1,396,170	$1,276,914	0.04%	-21.11%	3.09%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$2,026,917	$3,686,314	$3,743,137	$2,889,249	$2,008,634	-0.18%	-46.34%	4.86%
3401	Soap & Other Products to Wash the Skin	$3,787,643	$3,987,010	$2,709,176	$3,185,179	$2,695,949	-6.57%	-0.49%	6.53%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$6,112	$13,338	$13,852	$2,987	$3,788	-9.12%	-72.65%	0.01%
4818	Personal Care Wipes, Diapers, Tampons	$1,129,354	$768,800	$1,176,175	$1,145,283	$1,024,410	-1.93%	-12.90%	2.48%
5601	Sanitary Towels and Napkins	$933,633	$45,918	$51,035	$132,542	$12,175	-58.02%	-76.14%	0.03%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$280,478	$308,722	$372,576	$443,105	$533,526	13.72%	43.20%	1.29%
9605	Toilet Sets for Personal Travel	$1,357	$661	$2,867	$484	$7,026	38.94%	145.06%	0.02%
9619	Diapers and Fem Hygiene	NA	$265,424	$555,024	$252,675	$199,523	NA	-64.05%	0.48%
	Total Imports	$20,908,901	$25,308,304	$23,932,137	$25,648,506	$21,932,023	0.96%	-8.36%	53.11%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 10: Imported Products Share of New Zealand's Personal Care and Cosmetics Market

Importer	2011	% Market Share	2012	% Market Share	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	$49,637,438	4%	$55,393,751	5%	$63,298,633	5%	$71,122,679	6%	$78,917,998	7%
France	$97,261,246	9%	$109,398,227	9%	$123,190,187	11%	$136,614,077	12%	$110,358,573	10%
Japan	$35,378,749	3%	$38,695,809	3%	$32,511,149	3%	$34,415,950	3%	$33,627,339	3%
EU 28	$111,813,703	10%	$113,329,097	10%	$106,298,752	9%	$114,879,397	10%	$99,247,344	9%
China	$111,493,947	10%	$144,981,408	12%	$261,888,390	23%	$318,202,367	27%	$362,920,288	32%
Thailand	$201,384,139	18%	$199,307,696	17%	$195,182,922	17%	$26,368,920	2%	$146,048,770	13%
South Korea	$36,813,347	3%	$43,827,962	4%	$45,135,916	4%	$56,712,195	5%	$63,200,516	6%
Other	$375,451,035	34%	$349,407,644	30%	$206,976,102	18%	$281,734,329	24%	$120,380,604	11%
Total	$1,116,494,850	100%	$1,163,739,821	100%	$1,157,672,238	100%	$1,176,663,991	100%	$1,125,060,005	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 11: HS 34: Make Up Products, US Exports to New Zealand

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to NZ
3304	Make-Up & Skin-Care Preparations	$21,824,433	$25,332,047	$26,436,419	$32,791,945	$32,375,499	22%	8%	41%
330410	Lipstick, other prep	$1,342,066	$1,077,112	$1,293,669	$1,258,090	$1,197,281	-7%	-2%	2%
330420	Eye Make-Up	$387,396	$678,384	$945,617	$1,129,680	$825,500	-13%	16%	1%
330430	Manicure & Pedicure Preparations	$1,687,487	$1,057,817	$1,479,900	$940,084	$363,064	-308%	-26%	0%
330491	Powder Make-Up Or Skin Care Preparations	$220,262	$1,667,459	$457,663	$1,349,555	$708,636	55%	26%	1%
330499	Beauty & Skin Care Prep	$18,187,222	$20,851,275	$22,259,570	$28,114,536	$29,281,018	32%	10%	37%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 12: HS 35: Hair Care Products, US Exports to New Zealand

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to NZ
3305	Hair Care Products	$4,008,816	$3,503,896	$5,416,150	$6,004,291	$6,025,084	11%	8%	8%
330510	Shampoo	$15,977,185	$15,083,079	$16,588,638	$17,075,991	$15,770,682	-5%	0%	3%
330520	Prep for Waiving and Straightening Hair	$1,864,879	$810,333	$1,060,160	$3,604,965	$918,811	-13%	-13%	0%
330530	Hair Lacquer	$2,128,836	$1,864,879	$1,416,751	$1,083,927	$1,481,161	5%	-7%	0%
330590	Other Hair Products, inc. Color	$31,934,085	$28,888,226	$27,213,790	$30,848,008	$36,044,350	32%	2%	7%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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HS 37: Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants, US Exports to New Zealand

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to NZ
3307	Cosmetic & Toilet Prep	$5,741,787	$7,835,442	$8,891,821	$6,824,808	$11,408,062	10%	15%	14%
330710	Shaving Preparations	$6,822	$16,709	$0	$16,379	$2,063,029	10%	213%	3%
330720	Personal Deodorants and Antiperspirants	$554,913	$566,839	$450,028	$473,315	$336,306	10%	-10%	0%
330730	Perfumed Bath Salts And Other Bath	$81,550	$25,019	$70,555	$178,386	$188,295	10%	18%	0%
330790	Depilatories, Other Perfumery	$5,098,502	$7,226,875	$8,371,238	$6,156,728	$8,820,432	10%	12%	11%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 1:Philippines Total Personal Care and Cosmetics Imports

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Imports
3301	Essential Oils	$15,163,775	$23,026,879	$8,256,285	$9,293,530	$8,990,575	-10%	9%	1%
330290	Fragrances & Substances Used as Inputs	$47,956,034	$52,831,456	$67,795,187	$95,338,760	$77,749,079	10%	15%	6%
3303	Perfumes And Toilet Waters	$8,402,196	$7,708,584	$9,490,904	$12,809,363	$13,006,719	9%	37%	1%
3304	Make-Up & Skin-Care Preparations	$71,708,498	$74,759,581	$71,745,141	$80,907,431	$96,458,326	6%	34%	8%
3305	Hair Care Products	$48,475,190	$47,061,913	$37,680,454	$82,608,846	$89,589,951	13%	138%	7%
3306	Oral & Dental Hygiene	$49,012,574	$49,313,826	$47,310,451	$73,133,024	$56,222,735	3%	19%	4%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$23,499,463	$31,311,059	$42,032,411	$39,484,555	$45,170,421	14%	7%	4%
3401	Soap & Other Products to Wash the Skin	$64,483,762	$56,241,887	$57,383,727	$93,625,182	$76,469,596	3%	33%	6%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$21,656,064	$29,530,187	$30,918,086	$30,881,263	$31,834,106	8%	3%	2%
4818	Personal Care Wipes, Diapers, Tampons	$109,012,221	$119,496,131	$132,780,489	$131,095,559	$139,322,656	5%	5%	11%
5601	Sanitary Towels and Napkins	$4,665,911	$9,516,155	$8,265,871	$15,417,310	$5,052,949	2%	-39%	0%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$29,458,268	$26,074,212	$33,433,650	$27,349,647	$38,335,320	5%	15%	3%
9605	Toilet Sets for Personal Travel	$953,818	$943,287	$1,143,738	$790,100	$1,164,601	4%	2%	0%
9619	Diapers and Fem Hygiene	$446,491,740	$474,983,701	$480,441,207	$597,395,810	$601,617,955	6%	25%	47%
	Total Imports	$940,939,514	$1,002,798,858	$1,028,677,601	$1,290,130,380	$1,280,984,989	6%	25%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 2: Philippines Imports of Personal Care and Cosmetics Products from the U.S.

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$1,930,113	$2,071,423	$1,418,736	$2,198,818	$1,454,646	-5%	3%	3%
330290	Fragrances & Substances Used as Inputs	$2,166,433	$3,239,032	$3,963,456	$11,038,385	$11,083,699	39%	180%	19%
3303	Perfumes And Toilet Waters	$340,149	$829,339	$1,604,010	$1,446,743	$2,368,815	47%	48%	4%
3304	Make-Up & Skin-Care Preparations	$9,420,342	$12,633,306	$15,516,189	$13,652,647	$14,164,621	8%	-9%	25%
3305	Hair Care Products	$2,923,320	$3,740,880	$6,533,453	$7,211,507	$7,062,842	19%	8%	12%
3306	Oral & Dental Hygiene	$1,949,070	$2,375,752	$1,557,944	$1,882,499	$1,090,857	-11%	-30%	2%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$7,170,133	$6,353,575	$7,124,303	$7,210,758	$5,309,766	-6%	-25%	9%
3401	Soap & Other Products to Wash the Skin	$11,335,963	$8,677,419	$12,820,543	$12,810,079	$11,496,442	0%	-10%	20%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$128,282	$76,853	$34,147	$372,595	$687,853	40%	1914%	1%
4818	Personal Care Wipes, Diapers, Tampons	$1,374,651	$925,835	$671,897	$759,692	$397,710	-22%	-41%	1%
5601	Sanitary Towels and Napkins	$56,174	$15,472	$55,439	$120,313	$12,165	NA	NA	0%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$674,166	$879,663	$676,354	$1,006,886	$938,287	7%	39%	2%
9605	Toilet Sets for Personal Travel	$31,620	$67,512	NA	$12,382	$65,000	16%	NA	0%
9619	Diapers and Fem Hygiene	NA	$421,742	$899,626	$1,090,015	$802,651	NA	-11%	1%
	Total Imports	$39,500,416	$42,307,803	$52,876,097	$60,813,319	$56,935,354	8%	8%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 3: Philippines's Imports of Personal Care and Cosmetics Products from China

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$773,575	$627,318	$1,480,362	$3,527,997	$7,639,345	58%	416%	3%
330290	Fragrances & Substances Used as Inputs	$3,519,907	$3,666,486	$3,261,868	$4,681,281	$5,018,321	7%	54%	2%
3303	Perfumes And Toilet Waters	$1,392,406	$933,762	$1,243,894	$1,172,623	$1,467,418	1%	18%	0%
3304	Make-Up & Skin-Care Preparations	$7,750,424	$8,878,873	$11,292,937	$10,010,812	$16,135,147	16%	43%	5%
3305	Hair Care Products	$5,933,955	$7,805,409	$4,221,106	$5,464,356	$4,859,030	-4%	15%	2%
3306	Oral & Dental Hygiene	$4,540,736	$3,333,827	$4,926,636	$9,026,409	$6,495,472	7%	32%	2%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$11,508,780	$11,972,124	$16,094,397	$21,112,221	$36,427,686	26%	126%	12%
3401	Soap & Other Products to Wash the Skin	$6,243,817	$6,711,288	$11,853,427	$12,241,285	$11,039,967	12%	-7%	4%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$551,449	$1,209,098	$1,964,719	$3,351,190	$4,384,730	51%	123%	1%
4818	Personal Care Wipes, Diapers, Tampons	$66,557,871	$3,924,270	$5,132,068	$8,913,038	$9,206,343	-33%	79%	3%
5601	Sanitary Towels and Napkins	$8,962,686	$1,269,071	$2,863,126	$2,595,672	$3,577,377	-17%	25%	1%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$31,264,730	$31,877,984	$39,934,137	$43,112,697	$57,647,033	13%	44%	19%
9605	Toilet Sets for Personal Travel	$913,848	$1,505,119	$1,454,696	$1,088,132	$2,488,696	22%	71%	1%
9619	Diapers and Fem Hygiene	NA	$108,436,127	$119,139,265	$145,593,603	$132,879,241	NA	12%	44%
	Total Imports	$149,914,184	$192,150,756	$224,862,638	$271,891,316	$299,265,806	15%	33%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 4: Philippines's Imports of Personal Care and Cosmetics Products from Japan

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	NA	NA	NA	$11,511	NA	NA	NA	NA
330290	Fragrances & Substances Used as Inputs	$1,258,151	$639,534	$750,410	$549,535	$666,078	-12%	-11%	3%
3303	Perfumes And Toilet Waters	$3,202	NA	NA	NA	NA	NA	NA	NA
3304	Make-Up & Skin-Care Preparations	$756,553	$834,505	$1,346,667	$1,635,178	$2,313,226	25%	72%	12%
3305	Hair Care Products	$230,667	$600,435	$560,525	$336,284	$298,339	5%	-47%	1%
3306	Oral & Dental Hygiene	$408,562	$507,917	$612,764	$734,977	$1,158,993	NA	NA	6%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$291,778	$450,790	$464,358	$532,255	$529,822	13%	14%	3%
3401	Soap & Other Products to Wash the Skin	$991,955	$714,614	$758,055	$911,627	$657,583	-8%	-13%	3%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$11,937,384	$2,408,003	$746,363	$686,572	$344,807	-51%	-54%	2%
4818	Personal Care Wipes, Diapers, Tampons	$541,434	$747,236	$642,050	$736,205	$361,492	-8%	-44%	2%
5601	Sanitary Towels and Napkins	$2,813,970	$3,113,309	$1,995,408	$1,620,145	$1,721,788	-9%	-14%	9%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	NA	$8,627,580	$4,562,684	$1,545,507	$2,261,485	NA	-50%	11%
9605	Toilet Sets for Personal Travel	$17,975,505	$18,004,389	$11,688,874	$8,750,261	$9,647,535	NA	-17%	48%
9619	Diapers and Fem Hygiene	NA	NA	NA	NA	NA	NA	NA	NA
	Total Imports	$37,209,161	$36,648,312	$24,128,158	$18,050,057	$19,961,148	-14%	-17%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 5: Philippines's Imports of Personal Care and Cosmetics Products from France

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$32,491	$23,932	$12,116	$40,320	$60,658	13%	401%	1%
330290	Fragrances & Substances Used as Inputs	$3,302,535	$2,424,648	$3,062,925	$3,722,815	$3,066,117	-1%	0%	31%
3303	Perfumes And Toilet Waters	$1,048,187	$1,064,790	$1,096,229	$1,042,145	$1,180,150	2%	8%	12%
3304	Make-Up & Skin-Care Preparations	$2,356,115	$1,160,519	$1,063,663	$1,361,982	$1,783,234	-5%	68%	18%
3305	Hair Care Products	$166,112	$62,029	$101,286	$124,614	$105,493	-9%	4%	1%
3306	Oral & Dental Hygiene	$1,209	$14,375	NA	NA	$2,102	12%	NA	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$131,533	$319,310	$221,229	$159,657	$223,979	11%	1%	2%
3401	Soap & Other Products to Wash the Skin	$458,510	$165,926	$71,795	$21,862	$72,988	-31%	2%	1%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$3,804	$2,509	$2,657	$1,016	NA	NA	NA	NA
4818	Personal Care Wipes, Diapers, Tampons	$48,607	$6,915	$57,985	$847	$124	-70%	-100%	0%
5601	Sanitary Towels and Napkins	$42	$161	$162	$3,526	$28	-8%	-83%	0%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$49,551	$37,185	$5,471	$12,263	$12,814	-24%	134%	0%
9605	Toilet Sets for Personal Travel	NA	NA	$586	$1,250	$1,892	NA	NA	NA
9619	Diapers and Fem Hygiene	$4,296,161	$2,857,651	$2,633,179	$2,769,482	$3,443,462	NA	NA	35%
	Total Imports	$11,894,857	$8,139,950	$8,329,283	$9,261,779	$9,953,041	-4%	19%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 6: Philippines's Imports of Personal Care and Cosmetics Products from Thailand

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$6,302	$9,032	$14,595	$24,620	$58,111	56%	NA	0%
330290	Fragrances & Substances Used as Inputs	$93,007	$36,844	$145,279	$62,513	$58,667	NA	NA	0%
3303	Perfumes And Toilet Waters	$39,368	$344,593	$467,205	$345,476	$345,396	54%	-26%	0%
3304	Make-Up & Skin-Care Preparations	$19,582,156	$16,940,252	$21,746,944	$33,575,725	$25,413,522	5%	17%	12%
3305	Hair Care Products	$71,852,430	$61,437,682	$64,239,246	$93,254,988	$86,429,722	4%	35%	42%
3306	Oral & Dental Hygiene	$38,217,278	$42,830,750	$45,651,728	$45,272,499	$40,120,816	1%	-12%	19%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$7,270,966	$8,539,296	$8,842,827	$10,831,445	$10,322,555	7%	17%	5%
3401	Soap & Other Products to Wash the Skin	$18,336,757	$15,903,424	$13,776,003	$19,741,224	$15,072,063	-4%	9%	7%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$647,275	$312,463	$455,656	$140,157	$39,057	-43%	-91%	0%
4818	Personal Care Wipes, Diapers, Tampons	$28,250,126	$450,929	$424,346	$586,840	$630,943	-53%	49%	0%
5601	Sanitary Towels and Napkins	$3,478,781	$3,502,188	$3,278,980	$4,166,120	$4,484,947	5%	37%	2%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$445,133	$364,991	$764,642	$540,893	$478,656	1%	-37%	0%
9605	Toilet Sets for Personal Travel	$59,760	$30,119	$11,918	$22,623	$23,311	-17%	96%	0%
9619	Diapers and Fem Hygiene	NA	$28,588,703	$31,132,466	$29,792,108	$23,749,524	NA	-24%	11%
	Total Imports	$188,279,339	$179,291,266	$190,951,835	$238,357,231	$207,227,290	2%	9%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 7: Philippines's Imports of Personal Care and Cosmetics Products from South Korea

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$3,300	$19,132	NA	$178	$4,112	4%	NA	0%
330290	Fragrances & Substances Used as Inputs	NA	$57,020	$46,689	$22,559	NA	NA	NA	NA
3303	Perfumes And Toilet Waters	$40,205	$30,355	$76,138	$57,656	$41,269	1%	-46%	0%
3304	Make-Up & Skin-Care Preparations	$5,303,036	$7,212,311	$8,930,228	$9,910,174	$10,682,419	15%	20%	50%
3305	Hair Care Products	$485,047	$820,582	$728,628	$937,193	$1,151,719	19%	58%	5%
3306	Oral & Dental Hygiene	$616,143	$278,272	$220,973	$286,346	$150,016	-25%	-32%	1%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$350,956	$752,566	$1,007,051	$1,043,139	$1,488,356	34%	48%	7%
3401	Soap & Other Products to Wash the Skin	$444,354	$167,905	$276,295	$303,285	$289,523	-8%	5%	1%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$4,006	$24,463	$45,205	$144,146	$39,101	NA	NA	0%
4818	Personal Care Wipes, Diapers, Tampons	$1,451,808	$1,521,671	$1,784,598	$1,273,244	$1,785,306	4%	0%	8%
5601	Sanitary Towels and Napkins	$389,572	$159,391	$6,678,636	$11,306,898	$3,818,341	58%	-43%	18%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$407,876	$570,245	$725,196	$854,188	$1,361,140	27%	88%	6%
9605	Toilet Sets for Personal Travel	$896	$119	$88	$2,683	$163	NA	NA	0%
9619	Diapers and Fem Hygiene	NA	$518,903	$528,257	$627,574	$700,244	NA	NA	3%
	Total Imports	$9,497,199	$12,132,935	$21,047,982	$26,769,263	$21,511,709	18%	2%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 8: Philippines's Imports of Personal Care and Cosmetics Products from EU 28

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$759,891	$1,044,206	$1,102,953	$1,767,002	$971,543	5%	-12%	2%
330290	Fragrances & Substances Used as Inputs	$12,854,969	$13,729,836	$15,950,623	$20,046,284	$17,093,750	6%	7%	34%
3303	Perfumes And Toilet Waters	$10,212,879	$7,943,783	$9,209,824	$8,823,051	$8,777,742	-3%	-5%	18%
3304	Make-Up & Skin-Care Preparations	$8,748,888	$8,550,533	$9,179,284	$11,436,562	$12,322,767	7%	34%	25%
3305	Hair Care Products	$2,164,765	$2,459,608	$2,363,698	$2,814,994	$3,219,440	8%	36%	6%
3306	Oral & Dental Hygiene	$2,295,896	$1,942,068	$2,528,050	$2,809,344	$2,061,333	-2%	-18%	4%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$1,463,857	$1,411,260	$1,295,304	$1,757,082	$1,451,733	0%	12%	3%
3401	Soap & Other Products to Wash the Skin	$5,601,049	$1,898,461	$1,225,853	$1,439,089	$1,768,790	-21%	44%	4%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$18,300	$4,573	$26,885	$53,661	$160,287	54%	496%	0%
4818	Personal Care Wipes, Diapers, Tampons	$653,025	$65,538	$296,700	$292,910	$88,695	-33%	-70%	0%
5601	Sanitary Towels and Napkins	$186,520	$2,475,984	$1,183,111	$400,710	$241,074	5%	-80%	0%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$1,028,758	$1,151,959	$1,220,073	$1,136,584	$1,522,843	8%	25%	3%
9605	Toilet Sets for Personal Travel	$998,352	$1,697,189	$156,415	$202	$7,831	-62%	NA	0%
9619	Diapers and Fem Hygiene	NA	$201,210	$463,726	$412,845	$415,979	NA	NA	1%
	Total Imports	$46,987,149	$44,576,208	$46,202,499	$53,190,320	$50,103,807	1%	8%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 9: Philippines's Imports of Personal Care and Cosmetics Products from Indonesia

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$66	$21,631	$45,286	$18,943	$10	-31%	-100%	0%
330290	Fragrances & Substances Used as Inputs	$10,852,733	$12,222,437	$12,122,772	$15,085,931	$15,671,062	NA	29%	15%
3303	Perfumes And Toilet Waters	$883,140	$1,355,510	$1,195,888	$1,071,571	$2,162,096	20%	81%	2%
3304	Make-Up & Skin-Care Preparations	$9,337,242	$8,758,924	$10,081,065	$10,767,659	$8,071,919	-3%	-20%	8%
3305	Hair Care Products	$13,127,891	$8,739,657	$7,940,165	$11,132,417	$6,855,742	-12%	-14%	7%
3306	Oral & Dental Hygiene	$15,951,114	$15,401,843	$17,426,131	$20,320,106	$13,230,133	-4%	-24%	13%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$3,950,490	$2,898,921	$4,717,533	$2,164,994	$1,929,011	-13%	-59%	2%
3401	Soap & Other Products to Wash the Skin	$14,385,075	$19,322,878	$19,626,216	$22,818,048	$22,707,654	10%	16%	22%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$16,392,243	$21,500,038	$21,682,956	$21,580,252	$19,520,232	4%	-10%	19%
4818	Personal Care Wipes, Diapers, Tampons	$5,588,309	$4,646,148	$6,205,762	$5,834,667	$7,572,823	6%	22%	7%
5601	Sanitary Towels and Napkins	$1,150,886	$749,069	$864,601	$1,255,297	$1,360,483	3%	57%	1%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$107,278	$59,060	$521,100	$731,458	$765,530	48%	47%	1%
9605	Toilet Sets for Personal Travel	$74	NA	$501	$9,168	$4,371	126%	772%	0%
9619	Diapers and Fem Hygiene	NA	$1,509,833	$2,411,330	$2,084,384	$3,202,603	NA	33%	3%
	Total Imports	$91,726,541	$97,185,949	$104,841,306	$114,874,895	$103,053,669	2%	-2%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 10: Imported Products Share of Philippines's Personal Care and Cosmetics Market

Importer	2011	% Market Share	2012	% Market Share	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	$39,500,416	4%	$42,307,803	4%	$52,876,097	5%	$60,813,319	5%	$56,935,354	4%
France	$11,894,857	1%	$8,139,950	1%	$8,329,283	1%	$9,261,779	1%	$9,953,041	1%
Japan	$37,209,161	4%	$36,648,312	4%	$24,128,158	2%	$18,050,057	1%	$19,961,148	2%
EU 28	$46,987,149	5%	$44,576,208	4%	$46,202,499	4%	$53,190,320	4%	$50,103,807	4%
China	$149,914,184	16%	$192,150,756	19%	$224,862,638	22%	$271,891,316	21%	$299,265,806	23%
South Korea	$9,497,199	1%	$12,132,935	1%	$21,047,982	2%	$26,769,263	2%	$21,511,709	2%
Thailand	$188,279,339	20%	$179,291,266	18%	$190,951,835	19%	$238,357,231	18%	$207,227,290	16%
Indonesia	$91,726,541	10%	$97,185,949	10%	$104,841,306	10%	$114,874,895	9%	NA	0%
Other Countries	$365,930,668	39%	$390,365,679	39%	$355,437,803	35%	$496,922,200	39%	$616,026,834	48%
Total Imported	$940,939,514	100%	$1,002,798,858	100%	$1,028,677,601	100%	$1,290,130,380	100%	$1,280,984,989	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 11: HS 34: Make Up Products, US Exports to Philippines

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports
3304	Make-Up & Skin-Care Preparations	$9,420,342	$12,633,306	$15,516,189	$13,652,647	$14,164,621	-9%	8%	25%
330410	Lipstick, other prep	$1,907,833	$2,207,788	$1,060,223	$2,061,003	$2,323,406	119%	4%	4%
330420	Eye Make-Up	$315,549	$354,731	$439,241	$252,263	$402,228	-8%	5%	1%
330430	Manicure & Pedicure Preparations	$632,690	$812,404	$1,268,558	$1,016,073	$1,008,175	-26%	10%	2%
330491	Powder Make-Up Or Skin Care Preparations	$618,228	$632,915	$452,107	$367,437	$334,674	-26%	-12%	1%
330499	Beauty & Skin Care Prep	$5,946,042	$8,625,468	$12,296,060	$9,955,871	$10,096,138	-18%	11%	18%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 12: HS 35: Hair Care Products, US Exports to Philippines

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports
3305	Hair Care Products	$2,923,320	$3,740,880	$6,533,453	$7,211,507	$7,062,842	8%	19%	12%
330510	Shampoo	$1,689,625	$2,563,585	$3,968,746	$3,679,743	$3,730,326	-6%	17%	7%
330520	Prep for Waiving and Straightening Hair	$13,135	$30,227	$114,221	$224,361	$132,158	16%	NA	0%
330530	Hair Lacquer	$169,014	$220,034	$204,149	$367,529	$518,332	154%	NA	1%
330590	Other Hair Products, inc. Color	$1,051,546	$927,034	$2,246,337	$2,939,874	$2,682,026	19%	21%	5%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Singapore Personal Care and Cosmetics Trade
2011-2015

Table 1:Singapore Total Personal Care and Cosmetics Imports

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Imports
3301	Essential Oils	$167,240,584	$159,971,881	$136,884,163	$133,224,583	$132,687,582	-5%	-3%	4%
330290	Fragrances & Substances Used as Inputs	$67,216,722	$60,326,699	$69,866,426	$57,997,436	$51,249,024	-5%	-27%	2%
3303	Perfumes And Toilet Waters	$546,363,315	$578,995,425	$652,092,174	$678,953,113	$640,244,901	3%	-2%	21%
3304	Make-Up & Skin-Care Preparations	$1,179,506,112	$1,171,795,517	$1,381,516,393	$1,443,307,485	$1,421,400,770	4%	3%	47%
3305	Hair Care Products	$131,942,222	$122,477,412	$121,664,067	$125,815,393	$135,093,193	0%	11%	4%
3306	Oral & Dental Hygiene	$29,240,285	$35,504,546	$34,935,245	$37,896,962	$38,853,505	6%	11%	1%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$180,337,075	$205,144,713	$179,828,867	$180,088,497	$186,793,898	1%	4%	6%
3401	Soap & Other Products to Wash the Skin	$83,043,771	$79,321,151	$99,194,749	$112,190,676	$123,492,548	8%	24%	4%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$11,623,643	$14,571,861	$15,047,088	$15,886,985	$15,540,632	6%	3%	1%
4818	Personal Care Wipes, Diapers, Tampons	$186,286,684	$131,901,560	$129,729,318	$129,133,227	$122,604,679	-8%	-5%	4%
5601	Sanitary Towels and Napkins	$24,651,501	$18,687,888	$16,204,047	$16,355,362	$15,488,089	-9%	-4%	1%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$47,233,046	$46,369,558	$49,320,423	$53,893,670	$62,102,878	6%	26%	2%
9605	Toilet Sets for Personal Travel	$2,889,399	$3,532,638	$4,042,547	$4,019,540	$3,459,814	4%	-14%	0%
9619	Diapers and Fem Hygiene	NA	$56,038,200	$65,858,602	$67,683,386	$62,419,068	NA	-5%	2%
	Total Imports	$2,657,574,359	$2,684,639,049	$2,956,184,109	$3,056,446,315	$3,011,430,581	3%	2%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Singapore Personal Care and Cosmetics Trade
2011-2015

Table 2: Singapore Imports of Personal Care and Cosmetics Products from the U.S.

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$12,283,180	$13,743,106	$16,442,932	$20,789,970	$22,258,361	13%	35%	7%
330290	Fragrances & Substances Used as Inputs	$67,216,722	$60,326,699	$69,866,426	$57,997,436	$51,249,024	-5%	-27%	15%
3303	Perfumes And Toilet Waters	$52,487,361	$62,640,486	$63,253,842	$62,702,864	$62,567,399	4%	-1%	18%
3304	Make-Up & Skin-Care Preparations	$74,658,549	$93,325,563	$124,464,130	$134,977,711	$155,018,184	16%	25%	46%
3305	Hair Care Products	$9,089,430	$9,802,679	$10,968,187	$15,185,233	$16,715,159	13%	52%	5%
3306	Oral & Dental Hygiene	$2,301,411	$1,537,864	$2,042,836	$1,521,042	$2,068,101	-2%	1%	1%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$13,629,478	$16,833,652	$10,868,813	$12,831,756	$13,410,952	0%	23%	4%
3401	Soap & Other Products to Wash the Skin	$3,370,724	$5,507,358	$6,814,917	$8,275,632	$7,786,496	18%	14%	2%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$122,774	$107,248	$159,239	$81,577	$245,394	15%	54%	0%
4818	Personal Care Wipes, Diapers, Tampons	$2,032,797	$1,201,946	$1,358,517	$1,812,348	$1,916,645	-1%	41%	1%
5601	Sanitary Towels and Napkins	$573,606	$462,827	$468,867	$478,641	$459,571	-4%	-2%	0%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$5,200,267	$4,994,200	$5,458,028	$5,837,728	$5,993,149	3%	10%	2%
9605	Toilet Sets for Personal Travel	$26,258	$34,374	$33,733	$42,350	$40,798	9%	21%	0%
9619	Diapers and Fem Hygiene	NA	$1,430,296	$1,769,513	$2,280,832	$824,702	NA	-53%	0%
	Total Imports	$242,992,557	$271,948,298	$313,969,980	$324,815,120	$340,553,935	6%	8%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Singapore Personal Care and Cosmetics Trade
2011-2015

Table 3: Singapore's Imports of Personal Care and Cosmetics Products from China

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$32,776,454	$16,786,168	$10,328,496	$28,778,345	$39,857,131	4%	286%	11%
330290	Fragrances & Substances Used as Inputs	$67,216,722	$60,326,699	$69,866,426	$57,997,436	$51,249,024	-5%	-27%	14%
3303	Perfumes And Toilet Waters	$9,007,029	$10,579,157	$6,906,252	$8,585,378	$7,129,772	-5%	3%	2%
3304	Make-Up & Skin-Care Preparations	$74,143,158	$47,101,478	$53,917,710	$53,134,013	$57,737,065	-5%	7%	16%
3305	Hair Care Products	$2,184,194	$1,170,063	$1,235,337	$1,647,268	$1,667,893	-5%	35%	0%
3306	Oral & Dental Hygiene	$574,503	$612,157	$857,884	$1,010,188	$894,377	9%	4%	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$10,741,938	$11,740,308	$16,991,614	$28,540,272	$28,876,141	22%	70%	8%
3401	Soap & Other Products to Wash the Skin	$3,887,396	$6,205,905	$4,300,544	$6,137,315	$3,265,924	-3%	-24%	1%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$110,198	$323,211	$3,593,081	$3,662,828	$6,619,492	127%	84%	2%
4818	Personal Care Wipes, Diapers, Tampons	$11,020,051	$6,256,469	$37,025,033	$61,448,588	$103,312,386	56%	179%	28%
5601	Sanitary Towels and Napkins	$1,710,430	$1,670,318	$3,348,751	$7,596,914	$3,171,185	13%	-5%	1%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$19,145,732	$28,241,355	$36,891,128	$42,509,843	$50,315,540	21%	36%	14%
9605	Toilet Sets for Personal Travel	$593,114	$4,042,674	$6,799,443	$5,588,379	$3,269,505	41%	-52%	1%
9619	Diapers and Fem Hygiene	NA	$8,970,276	$9,768,330	$12,704,724	$8,865,228	NA	-9%	2%
	Total Imports	$233,110,919	$204,026,238	$261,830,029	$319,341,491	$366,230,663	9%	40%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 4: Singapore's Imports of Personal Care and Cosmetics Products from Japan

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$1,657,759	$542,581	$353,938	$785,299	$1,210,412	-6%	242%	1%
330290	Fragrances & Substances Used as Inputs	$547,500	$186,753	$329,007	$494,039	$278,745	-13%	-15%	0%
3303	Perfumes And Toilet Waters	$862,550	$27,636	$73,737	$80,228	$5,008	-64%	-93%	0%
3304	Make-Up & Skin-Care Preparations	$95,617,540	$108,982,661	$101,734,413	$102,047,281	$108,358,518	3%	7%	77%
3305	Hair Care Products	$10,859,916	$11,657,653	$8,372,570	$8,189,149	$8,397,117	-5%	0%	6%
3306	Oral & Dental Hygiene	$585,264	$479,629	$633,524	$331,081	$448,917	-5%	-29%	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$4,602,215	$5,618,703	$6,021,821	$4,746,080	$4,778,063	1%	-21%	3%
3401	Soap & Other Products to Wash the Skin	$2,741,519	$4,198,759	$3,929,918	$4,372,033	$5,275,143	14%	34%	4%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$319,119	$107,639	$358,590	$152,457	$9,140	-51%	-97%	0%
4818	Personal Care Wipes, Diapers, Tampons	$7,095,372	$1,062,174	$737,182	$760,596	$522,260	-41%	-29%	0%
5601	Sanitary Towels and Napkins	$573,798	$908,570	$657,912	$383,527	$350,972	-9%	-47%	0%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$4,234,720	$6,023,390	$4,821,131	$5,544,495	$3,612,897	-3%	-25%	3%
9605	Toilet Sets for Personal Travel	$11,881	$3,282	$7,798	NA	$3,116	NA	NA	0%
9619	Diapers and Fem Hygiene	$0	$6,519,506	$8,263,369	$9,023,287	$7,429,997	NA	-10%	5%
	Total Imports	$129,709,153	$146,318,936	$136,294,910	$136,909,552	$140,680,305	-1%	3%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 5: Singapore's Imports of Personal Care and Cosmetics Products from France

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$3,865,713	$4,057,563	$5,406,273	$5,321,422	$5,842,582	9%	8%	1%
330290	Fragrances & Substances Used as Inputs	$12,106,421	$12,796,629	$15,296,347	$8,746,258	$7,710,473	-9%	-50%	1%
3303	Perfumes And Toilet Waters	$119,646,109	$125,581,203	$133,638,474	$153,850,586	$123,451,639	1%	-8%	18%
3304	Make-Up & Skin-Care Preparations	$435,210,627	$415,579,747	$504,719,705	$556,823,555	$514,600,275	3%	2%	77%
3305	Hair Care Products	$7,463,586	$8,917,156	$4,901,959	$4,259,930	$4,082,114	-11%	-17%	1%
3306	Oral & Dental Hygiene	$320,610	$502,187	$380,836	$409,313	$482,352	9%	27%	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$12,031,846	$14,371,965	$7,443,574	$5,746,059	$4,483,796	-18%	-40%	1%
3401	Soap & Other Products to Wash the Skin	$2,170,747	$1,927,581	$2,647,072	$3,024,255	$4,609,342	16%	74%	1%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$1,511	$77,496	$46,709	$1,803	$480	NA	NA	NA
4818	Personal Care Wipes, Diapers, Tampons	$770,275	$436,846	$165,915	$174,098	$273,096	-19%	65%	0%
5601	Sanitary Towels and Napkins	$120,679	$2,165	$11,989	$1,470	$15,087	-34%	26%	0%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$465,596	$1,549,165	$2,247,867	$2,830,177	$2,069,383	35%	-8%	0%
9605	Toilet Sets for Personal Travel	$16,189	$22,709	$22,581	$6,954	$24,819	NA	NA	NA
9619	Diapers and Fem Hygiene	NA	$459,363	$801,023	$905,638	$859,276	NA	NA	0%
	Total Imports	$594,189,909	$586,281,775	$677,730,324	$742,101,518	$668,504,714	2%	-1%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 6: Singapore's Imports of Personal Care and Cosmetics Products from Thailand

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$411,021	$471,275	$525,404	$392,295	$190,102	-14%	-64%	0%
330290	Fragrances & Substances Used as Inputs	$426,551	$489,400	$424,911	$353,320	$305,292	-6%	-28%	0%
3303	Perfumes And Toilet Waters	$586,560	$338,505	$115,039	$102,961	$160,707	-23%	40%	0%
3304	Make-Up & Skin-Care Preparations	$16,079,044	$16,314,599	$18,146,251	$17,405,928	$13,913,245	-3%	-23%	20%
3305	Hair Care Products	$25,040,786	$29,244,781	$28,833,292	$22,467,930	$18,793,601	-6%	-35%	27%
3306	Oral & Dental Hygiene	$3,442,253	$4,118,796	$4,315,109	$4,160,904	$4,632,585	6%	7%	7%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$5,516,472	$3,304,218	$5,554,372	$3,785,696	$9,874,498	12%	78%	14%
3401	Soap & Other Products to Wash the Skin	$9,648,929	$9,355,159	$10,292,690	$9,810,411	$9,716,963	0%	-6%	14%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$442	$7,190	$2,697	$5,830	$8,438	80%	213%	0%
4818	Personal Care Wipes, Diapers, Tampons	$14,160,648	$3,107,195	$2,332,906	$2,397,692	$2,006,203	-32%	-14%	3%
5601	Sanitary Towels and Napkins	$5,923,894	$164,315	$184,989	$91,292	$444,601	-40%	140%	1%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$994,631	$962,416	$1,920,620	$847,189	$1,933,449	14%	1%	3%
9605	Toilet Sets for Personal Travel	$392,349	$260,343	$211,663	$43,692	$82,527	-27%	-61%	0%
9619	Diapers and Fem Hygiene	$0	$12,221,313	$9,814,484	$8,713,858	$7,426,714	NA	-24%	11%
	Total Imports	$82,623,580	$80,359,505	$82,674,427	$70,578,998	$69,488,925	-3%	-16%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 7: Singapore's Imports of Personal Care and Cosmetics Products from South Korea

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$3,784	NA	$127	$78,948	$3,237	-3%	NA	0%
330290	Fragrances & Substances Used as Inputs	$104,239	$33,515	$8,339	$3,724	$2,767	-52%	-67%	0%
3303	Perfumes And Toilet Waters	$6,021,929	$6,119,930	$2,246,969	$2,422,965	$3,743,546	-9%	67%	5%
3304	Make-Up & Skin-Care Preparations	$22,408,593	$30,085,534	$33,889,969	$38,782,595	$52,408,307	19%	55%	76%
3305	Hair Care Products	$2,760,164	$2,858,986	$3,439,791	$3,811,793	$3,620,257	6%	5%	5%
3306	Oral & Dental Hygiene	$260,986	$439,108	$246,947	$281,367	$258,539	0%	5%	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$711,749	$958,820	$1,252,802	$2,479,454	$3,444,546	37%	175%	5%
3401	Soap & Other Products to Wash the Skin	$305,772	$638,497	$569,127	$763,267	$2,825,012	56%	396%	4%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$1,998	$792	$30,606	$287,769	$298,597	172%	876%	0%
4818	Personal Care Wipes, Diapers, Tampons	$389,672	$50,680	$148,902	$103,873	$284,965	-6%	91%	0%
5601	Sanitary Towels and Napkins	$135,495	$60,799	$87,664	$232,446	$106,586	-5%	22%	0%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$351,515	$310,284	$275,046	$458,033	$562,309	10%	104%	1%
9605	Toilet Sets for Personal Travel	NA	NA	$8,695	$2,978	$7,975	NA	NA	0%
9619	Diapers and Fem Hygiene	NA	$129,754	$193,462	$654,499	$963,487	NA	NA	1%
	Total Imports	$33,455,896	$41,686,699	$42,398,446	$50,363,711	$68,530,130	15%	62%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 8: Singapore's Imports of Personal Care and Cosmetics Products from EU 28

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$14,394,683	$16,090,452	$17,971,226	$18,814,654	$21,268,227	8%	18%	2%
330290	Fragrances & Substances Used as Inputs	$26,926,610	$24,638,430	$31,217,159	$19,107,892	$17,105,541	-9%	-45%	2%

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3303	Perfumes And Toilet Waters	$239,431,713	$257,235,976	$283,858,927	$313,455,582	$281,636,958	3%	-1%	27%
3304	Make-Up & Skin-Care Preparations	$498,839,222	$491,456,710	$604,630,125	$644,777,458	$609,070,207	4%	1%	59%
3305	Hair Care Products	$20,350,923	$23,457,365	$23,057,815	$20,807,620	$20,779,736	0%	-10%	2%
3306	Oral & Dental Hygiene	$2,912,937	$3,092,093	$3,189,452	$3,388,309	$3,236,650	2%	1%	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$42,551,786	$44,277,928	$29,495,277	$31,361,328	$31,381,132	-6%	6%	3%
3401	Soap & Other Products to Wash the Skin	$16,322,888	$15,844,485	$19,362,792	$22,061,749	$23,744,207	8%	23%	2%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$256,988	$200,785	$233,975	$109,041	$93,658	-18%	-60%	0%
4818	Personal Care Wipes, Diapers, Tampons	$4,831,068	$2,325,238	$2,123,714	$2,868,802	$2,707,269	-11%	27%	0%
5601	Sanitary Towels and Napkins	$592,948	$371,619	$424,127	$1,469,518	$1,304,124	17%	207%	0%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$4,590,319	$6,401,096	$7,107,049	$9,705,917	$9,603,922	16%	35%	1%
9605	Toilet Sets for Personal Travel	$193,157	$429,849	$446,969	$379,734	$415,877	17%	-7%	0%
9619	Diapers and Fem Hygiene	$0	$3,209,244	$3,088,420	$3,571,926	$2,146,856	NA	-30%	0%
	Total Imports	$872,195,242	$889,031,270	$1,026,207,027	$1,091,879,530	$1,024,494,364	3%	0%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 9: Imported Products Share of Singapore's Personal Care and Cosmetics Market

Importer	2011	% Market Share	2012	% Market Share	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	242,992,557	9%	271,948,298	10%	313,969,980	11%	324,815,120	11%	340,553,935	11%
France	594,189,909	22%	586,281,775	22%	677,730,324	23%	742,101,518	24%	668,504,714	22%
Japan	129,709,153	5%	146,318,936	5%	136,294,910	5%	136,909,552	4%	140,680,305	5%
EU 28 (excluding France)	278,005,333	10%	302,749,495	11%	348,476,703	12%	349,778,012	11%	355,989,650	12%
China	233,110,919	9%	204,026,238	8%	261,830,029	9%	319,341,491	10%	366,230,663	12%
South Korea	33,455,896	1%	41,686,699	2%	42,398,446	1%	50,363,711	2%	68,530,130	2%
Thailand	82,623,580	3%	80,359,505	3%	82,674,427	3%	70,578,998	2%	69,488,925	2%
Other Countries	1,063,487,012	40%	1,051,268,103	39%	1,092,809,290	37%	1,062,557,913	35%	1,001,452,259	33%
Total Imported	2,657,574,359	100%	2,684,639,049	100%	2,956,184,109	100%	3,056,446,315	100%	3,011,430,581	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 10: HS 34: Make Up Products, US Exports to Singapore

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to Aus
3304	Make-Up & Skin-Care Preparations	$74,658,549	$93,325,563	$124,464,130	$134,977,711	$155,018,184	25%	16%	46%
330410	Lipstick, other prep	$5,224,097	$4,845,527	$8,867,856	$8,824,386	$9,090,751	3%	12%	3%
330420	Eye Make-Up	$6,834,940	$9,198,519	$11,811,372	$9,495,009	$14,043,778	19%	15%	4%
330430	Manicure & Pedicure Preparations	$3,017,640	$4,588,525	$3,923,957	$4,197,771	$5,023,194	22%	11%	1%
330491	Powder Make-Up Or Skin Care Preparations	$3,883,935	$5,415,591	$5,692,501	$5,094,798	$6,363,519	12%	10%	2%
330499	Beauty & Skin Care Prep	$55,697,937	$69,277,401	$94,168,444	$107,365,747	$120,496,942	28%	17%	35%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 11: HS 35: Hair Care Products, US Exports to Singapore

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to Aus
3305	Hair Care Products	$9,089,430	$9,802,679	$10,968,187	$15,185,233	$16,715,159	52%	13%	5%
330510	Shampoo	$4,481,509	$5,285,872	$5,432,783	$7,989,669	$7,389,737	36%	11%	2%
330520	Prep for Waiving and Straightening Hair	$222,924	$62,793	$67,772	$30,224	$6,146	-91%	NA	0%
330530	Hair Lacquer	$230,845	$91,955	$149,572	$126,774	$218,713	46%	NA	0%
330590	Other Hair Products, inc. Color	$4,154,152	$4,362,059	$5,318,060	$7,038,566	$9,100,563	71%	17%	3%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 12: HS 37: Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants, US Exports to Singapore

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to Aus
3307	Cosmetic & Toilet Prep	$11,875,856	$15,501,762	$8,729,280	$10,307,902	$11,763,838	10%	0%	3%
330710	Shaving Preparations	$1,807,546	$1,241,101	$1,780,852	$1,552,302	$1,041,310	10%	-10%	0%
330720	Personal Deodorants and Antiperspirants	$1,532,801	$2,016,755	$1,677,018	$1,256,344	$1,236,219	10%	-4%	0%
330730	Perfumed Bath Salts And Other Bath	$953,245	$1,506,396	$957,141	$1,488,588	$1,158,426	10%	4%	0%
330790	Depilatories, Other Perfumery	$7,582,264	$10,737,510	$4,314,269	$6,010,668	$8,327,883	10%	2%	2%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 1:South Korea Total Personal Care and Cosmetics Imports

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Imports
3301	Essential Oils	$33,828,522	$31,272,533	$29,673,846	$38,220,378	$37,135,362	2%	25%	2%
330290	Fragrances & Substances Used as Inputs	$71,722,473	$75,325,673	$76,104,213	$89,530,493	$90,293,128	5%	19%	4%
3303	Perfumes And Toilet Waters	$105,812,683	$108,623,897	$119,205,704	$140,634,264	$143,820,041	6%	21%	6%
3304	Make-Up & Skin-Care Preparations	$862,728,372	$883,231,942	$878,331,235	$948,638,779	$937,014,347	2%	7%	42%
3305	Hair Care Products	$151,869,405	$163,083,589	$179,319,192	$191,405,931	$200,424,833	6%	12%	9%
3306	Oral & Dental Hygiene	$28,341,082	$33,866,666	$38,902,835	$54,175,427	$66,229,909	19%	70%	3%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$119,496,536	$117,426,088	$145,441,854	$142,869,831	$163,997,584	7%	13%	7%
3401	Soap & Other Products to Wash the Skin	$94,652,471	$96,062,803	$100,536,096	$117,502,315	$117,462,169	4%	17%	5%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$21,688,452	$25,220,465	$39,464,805	$44,851,950	$48,369,507	NA	NA	NA
4818	Personal Care Wipes, Diapers, Tampons	$179,507,737	$42,521,711	$43,835,681	$49,024,434	$52,430,911	-22%	20%	2%
5601	Sanitary Towels and Napkins	$98,075,645	$94,306,015	$87,912,358	$89,474,897	$68,911,523	-7%	-22%	3%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$114,223,033	$116,121,239	$114,331,174	$138,878,914	$153,098,691	6%	34%	7%
9605	Toilet Sets for Personal Travel	$994,792	$928,167	$1,276,270	$1,419,197	$1,421,541	7%	11%	0%
9619	Diapers and Fem Hygiene	NA	$137,755,055	$133,630,288	$139,995,331	$157,248,469	3%	18%	7%
	Total Imports	$1,882,941,203	$1,925,745,843	$1,987,965,551	$2,186,622,141	$2,237,858,015	4%	13%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 2: South Korea Imports of Personal Care and Cosmetics Products from the U.S.

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$8,281,525	$6,884,289	$7,529,736	$10,435,627	$8,077,406	0%	7%	2%
330290	Fragrances & Substances Used as Inputs	$5,481,113	$5,010,795	$3,868,947	$3,438,419	$5,602,916	0%	45%	1%
3303	Perfumes And Toilet Waters	$10,844,780	$17,112,115	$15,314,623	$20,475,990	$21,829,873	15%	43%	4%
3304	Make-Up & Skin-Care Preparations	$194,183,390	$212,211,412	$220,087,952	$237,047,916	$236,982,549	4%	8%	49%
3305	Hair Care Products	$36,213,048	$43,689,185	$43,052,254	$50,439,434	$52,951,269	8%	23%	11%
3306	Oral & Dental Hygiene	$12,171,715	$13,614,616	$15,930,057	$24,436,128	$24,225,347	15%	52%	5%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$27,269,160	$27,170,917	$29,973,307	$30,740,015	$32,918,745	4%	10%	7%
3401	Soap & Other Products to Wash the Skin	$23,088,172	$41,992,172	$43,039,315	$52,285,428	$54,749,181	19%	27%	11%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$3,704,845	$2,952,478	$3,234,201	$4,066,271	$3,237,185	-3%	0%	1%
4818	Personal Care Wipes, Diapers, Tampons	$25,484,924	$5,270,478	$5,840,269	$10,071,864	$6,404,947	-24%	10%	1%
5601	Sanitary Towels and Napkins	$9,360,956	$7,155,343	$8,362,189	$8,843,713	$7,432,025	-5%	-11%	2%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$10,172,704	$10,446,835	$10,799,548	$15,197,894	$15,602,564	9%	44%	3%
9605	Toilet Sets for Personal Travel	$20,317	$569,196	$24,356	$0	$17,494	-3%	-28%	0%
9619	Diapers and Fem Hygiene	$0	$21,738,874	$17,864,413	$22,292,834	$17,116,748	-6%	-4%	4%
	Total Imports	$366,276,649	$415,818,705	$424,921,167	$489,771,533	$487,148,249	4%	15%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 3: South Korea's Imports of Personal Care and Cosmetics Products from China

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$1,248,912	$1,102,325	$1,018,909	$2,504,475	$6,085,692	37%	497%	2%
330290	Fragrances & Substances Used as Inputs	$7,246,177	$6,348,961	$6,247,620	$4,804,872	$4,478,956	-9%	-28%	2%
3303	Perfumes And Toilet Waters	$18,421	$37,971	$1,137	$6,191	$53,436	24%	4600%	0%
3304	Make-Up & Skin-Care Preparations	$13,478,124	$10,626,628	$12,061,832	$11,049,499	$12,181,494	-2%	1%	5%
3305	Hair Care Products	$2,575,317	$2,324,265	$3,316,142	$5,513,650	$6,225,363	19%	88%	2%
3306	Oral & Dental Hygiene	$668,641	$825,569	$1,062,707	$1,141,934	$3,789,015	41%	257%	1%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$3,360,764	$5,189,068	$5,551,232	$8,533,543	$11,219,939	27%	102%	4%
3401	Soap & Other Products to Wash the Skin	$14,570,609	$11,702,454	$13,830,662	$8,897,330	$7,562,817	-12%	-45%	3%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$486,728	$1,593,818	$8,819,535	$3,973,920	$2,860,433	43%	-68%	1%
4818	Personal Care Wipes, Diapers, Tampons	$22,762,383	$6,238,850	$11,410,069	$17,276,018	$19,502,359	-3%	71%	7%
5601	Sanitary Towels and Napkins	$15,061,549	$14,574,905	$8,326,237	$10,058,195	$13,074,559	-3%	57%	5%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$53,571,340	$55,006,949	$62,412,446	$81,996,536	$100,203,836	13%	61%	38%
9605	Toilet Sets for Personal Travel	$549,776	$872,739	$766,950	$710,405	$1,146,810	16%	50%	0%
9619	Diapers and Fem Hygiene	$0	$32,536,301	$45,664,515	$55,453,476	$75,738,744	NA	66%	29%
	Total Imports	$135,598,741	$148,980,803	$180,489,993	$211,920,044	$264,123,453	14%	46%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 4: South Korea's Imports of Personal Care and Cosmetics Products from Japan

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$467,940	$557,602	$578,007	$502,906	$960,153	15%	66%	0%
330290	Fragrances & Substances Used as Inputs	$20,946,488	$25,724,437	$23,043,032	$27,887,672	$23,544,772	2%	2%	8%
3303	Perfumes And Toilet Waters	$214,403	$301,307	$306,126	$289,334	$286,703	6%	-6%	0%
3304	Make-Up & Skin-Care Preparations	$201,944,052	$196,468,434	$143,393,483	$144,130,435	$159,636,952	-5%	11%	56%
3305	Hair Care Products	$37,171,565	$41,041,500	$36,584,410	$37,736,334	$36,330,610	0%	-1%	13%
3306	Oral & Dental Hygiene	$927,014	$584,424	$816,114	$754,326	$767,626	-4%	-6%	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$10,811,992	$7,351,392	$6,819,674	$6,569,363	$7,400,470	-7%	9%	3%
3401	Soap & Other Products to Wash the Skin	$10,223,651	$6,971,485	$6,580,010	$6,713,265	$9,269,539	-2%	41%	3%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$1,282,628	$1,501,363	$2,107,867	$2,772,182	$2,660,264	16%	26%	1%
4818	Personal Care Wipes, Diapers, Tampons	$72,434,321	$1,405,048	$1,142,303	$2,797,678	$2,141,872	-51%	88%	1%
5601	Sanitary Towels and Napkins	$19,218,199	$20,165,203	$13,497,357	$12,499,218	$7,438,583	-17%	-45%	3%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$8,681,508	$11,641,680	$10,554,256	$8,352,749	$9,200,881	1%	-13%	3%
9605	Toilet Sets for Personal Travel	NA	$2,606	$3,586	$2,484	$3,967	NA	11%	0%
9619	Diapers and Fem Hygiene	NA	$43,383,869	$25,914,979	$18,729,133	$27,675,144	NA	NA	10%
	Total Imports	$384,323,761	$357,100,350	$271,341,204	$269,737,079	$287,317,536	-5%	6%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 5: South Korea's Imports of Personal Care and Cosmetics Products from France

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$3,240,515	$2,514,949	$2,895,712	$3,128,594	$3,844,983	3%	33%	2%
330290	Fragrances & Substances Used as Inputs	$6,921,155	$6,253,234	$5,911,170	$5,877,317	$5,220,959	-5%	-12%	2%
3303	Perfumes And Toilet Waters	$57,102,002	$52,626,402	$48,104,842	$63,726,430	$52,012,831	-2%	8%	21%
3304	Make-Up & Skin-Care Preparations	$204,946,211	$195,188,350	$216,784,815	$229,957,116	$171,080,110	-4%	-21%	68%
3305	Hair Care Products	$3,891,618	$3,676,463	$3,525,785	$3,077,053	$3,486,281	-2%	-1%	1%
3306	Oral & Dental Hygiene	$38,723	$355	$12,823	$143	$377	-60%	-97%	0%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$14,653,079	$7,641,504	$7,822,152	$9,897,736	$9,473,211	-8%	21%	4%
3401	Soap & Other Products to Wash the Skin	$2,284,155	$2,262,017	$4,972,714	$4,180,919	$3,806,609	11%	-23%	2%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$187,597	$277,758	$214,123	$396,529	$225,386	4%	5%	0%
4818	Personal Care Wipes, Diapers, Tampons	$220,651	$294,920	$513,144	$73,160	$114,969	-12%	-78%	0%
5601	Sanitary Towels and Napkins	$163,556	$392,643	$184,645	$200,287	$230,148	7%	25%	0%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$353,660	$501,671	$542,911	$356,107	$566,996	10%	4%	0%
9605	Toilet Sets for Personal Travel	$2,797	$0	$2,062	$1,540	$0	-100%	-100%	0%
9619	Diapers and Fem Hygiene	$0	$100,645	$25,145	$246,671	$241,525	NA	NA	0%
	Total Imports	$294,005,719	$271,730,911	$291,512,043	$321,119,602	$250,304,385	-3%	-14%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 6: South Korea's Imports of Personal Care and Cosmetics Products from EU28

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$8,062,377	$6,554,463	$7,921,668	$8,993,435	$9,184,580	3%	16%	2%
330290	Fragrances & Substances Used as Inputs	$18,567,186	$18,211,117	$17,314,877	$18,200,086	$15,603,539	-3%	-10%	3%
3303	Perfumes And Toilet Waters	$123,014,462	$117,987,182	$108,095,127	$132,604,627	$123,522,355	0%	14%	21%
3304	Make-Up & Skin-Care Preparations	$296,939,484	$295,450,361	$331,293,709	$356,000,150	$311,770,908	1%	-6%	52%
3305	Hair Care Products	$16,439,031	$17,005,090	$23,130,686	$21,803,255	$21,677,501	6%	-6%	4%
3306	Oral & Dental Hygiene	$6,507,953	$5,141,169	$5,959,674	$6,489,811	$7,020,731	2%	18%	1%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$27,823,690	$20,912,148	$20,490,742	$22,718,320	$26,134,938	-1%	28%	4%
3401	Soap & Other Products to Wash the Skin	$20,548,176	$17,781,799	$20,424,368	$16,935,071	$18,351,922	-2%	-10%	3%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$401,150	$533,337	$1,206,297	$894,531	$1,072,039	22%	-11%	0%
4818	Personal Care Wipes, Diapers, Tampons	$10,154,234	$3,995,977	$3,629,532	$3,652,584	$2,813,198	-23%	-22%	0%
5601	Sanitary Towels and Napkins	$13,700,855	$18,293,689	$30,833,576	$25,657,643	$21,289,370	9%	-31%	4%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$13,754,137	$19,177,612	$17,848,030	$24,022,625	$27,281,299	15%	53%	5%
9605	Toilet Sets for Personal Travel	$88,307	$104,287	$69,281	$176,753	$165,594	13%	NA	0%
9619	Diapers and Fem Hygiene	$0	$12,729,582	$9,743,590	$13,196,939	$11,694,069	NA	NA	2%
	Total Imports	$556,001,042	$553,877,813	$597,961,157	$651,345,830	$597,582,043	1%	0%	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 7: South Korea's Imports of Personal Care and Cosmetics Products from South Korea

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$366	NA	$3,152	$1,366	$488	NA	-85%	0.00%
330290	Fragrances & Substances Used as Inputs	NA	$7,738	$664	NA	$204,568	127%	30708%	0.44%
3303	Perfumes And Toilet Waters	NA	NA	$2,017	$18,529	$16,293	NA	708%	0.04%
3304	Make-Up & Skin-Care Preparations	$7,392,585	$9,799,345	$11,920,531	$15,112,060	$14,856,070	15%	25%	32.14%
3305	Hair Care Products	$677,026	$1,144,617	$1,169,621	$1,284,775	$1,796,815	22%	54%	3.89%
3306	Oral & Dental Hygiene	$93,401	$71,876	$60,909	$195,352	$198,835	16%	226%	0.43%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$743,713	$1,213,941	$2,351,946	$13,307,933	$11,982,377	74%	409%	25.92%
3401	Soap & Other Products to Wash the Skin	$708,430	$221,094	$140,222	$251,765	$392,203	-11%	180%	0.85%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$110,736	$70,669	$277,448	$155,329	$154,616	7%	-44%	0.33%
4818	Personal Care Wipes, Diapers, Tampons	$17,662,721	$512,243	$1,092,359	$1,921,743	$6,483,574	-18%	494%	14.03%
5601	Sanitary Towels and Napkins	$11,572	$1,636	$666	$123,551	$175,844	72%	26303%	0.38%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$848,128	$779,986	$999,653	$1,155,640	$408,026	-14%	-59%	0.88%
9605	Toilet Sets for Personal Travel	NA	NA	$1,113	$2,065	$2,762	NA	148%	0.01%
9619	Diapers and Fem Hygiene	NA	$15,675,624	$10,297,790	$10,497,939	$9,546,923	NA	-7%	20.66%
	Total Imports	$28,248,678	$29,498,769	$28,318,091	$44,028,047	$46,219,394	10%	63%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 8: South Korea's Imports of Personal Care and Cosmetics Products from United Kingdom

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$3,403,031	$4,396,493	$5,995,190	$4,466,169	$2,198,816	-16%	-63%	1.89%
330290	Fragrances & Substances Used as Inputs	$4,542,607	$2,870,882	$2,244,132	$1,420,097	$2,750,602	-1%	23%	2.36%
3303	Perfumes And Toilet Waters	$15,819,386	$22,177,450	$17,657,506	$15,316,839	$11,282,509	-7%	-36%	9.68%
3304	Make-Up & Skin-Care Preparations	$45,970,519	$47,904,353	$48,841,903	$44,862,667	$48,670,915	1%	0%	41.75%
3305	Hair Care Products	$12,213,229	$13,053,363	$9,680,306	$12,054,592	$13,422,774	2%	39%	11.51%
3306	Oral & Dental Hygiene	$2,584,258	$5,331,922	$7,538,642	$8,693,707	$7,957,571	25%	6%	6.83%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$16,644,592	$12,604,105	$15,859,871	$11,727,398	$8,814,010	-12%	-44%	7.56%
3401	Soap & Other Products to Wash the Skin	$25,062,649	$25,810,832	$22,168,642	$22,076,798	$16,450,740	-8%	-26%	14.11%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$1,598,196	$1,596,064	$588,056	$656,852	$178,752	-35%	-70%	0.15%
4818	Personal Care Wipes, Diapers, Tampons	$6,944,655	$5,287,044	$4,262,295	$4,924,820	$3,909,174	-11%	-8%	3.35%
5601	Sanitary Towels and Napkins	$1,070,785	$683,602	$912,298	$955,851	$623,957	-10%	-32%	0.54%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$2,305,156	$2,540,513	$3,527,251	$3,847,817	$2,631,068	3%	-25%	2.26%
9605	Toilet Sets for Personal Travel	$47,663	$164,370	$123,728	$186,176	$79,703	11%	-36%	0.07%
9619	Diapers and Fem Hygiene	NA	$790,202	$779,589	$580,723	$354,831	NA	-54%	0.30%
	Total Imports	$133,664,119	$142,340,313	$137,935,277	$130,350,409	$116,574,820	-3%	-15%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 9: South Korea's Imports of Personal Care and Cosmetics Products from EU 28

HTS Code	Description	2011	2012	2013	2014	2015	CAGR 2010-2015	3 Year Avg Growth	% Share of 2015 Total Imports
3301	Essential Oils	$8,161,332	$9,039,432	$11,305,618	$10,355,448	$7,365,820	NA	-35%	1.16%
330290	Fragrances & Substances Used as Inputs	$7,952,513	$6,219,558	$5,021,495	$3,936,001	$4,910,013	-6%	-2%	0.78%
3303	Perfumes And Toilet Waters	$94,232,862	$104,367,802	$107,427,469	$111,440,766	$102,182,885	2%	-5%	16.14%
3304	Make-Up & Skin-Care Preparations	$190,512,059	$182,260,766	$204,159,334	$204,901,025	$198,998,964	1%	-3%	31.43%
3305	Hair Care Products	$80,821,882	$72,196,858	$84,042,222	$88,053,224	$78,751,875	-1%	-6%	12.44%
3306	Oral & Dental Hygiene	$13,162,360	$18,418,312	$18,751,882	$18,306,118	$43,250,353	27%	131%	6.83%
3307	Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants	$49,480,226	$45,311,572	$45,862,578	$40,342,855	$34,302,558	-7%	-25%	5.42%
3401	Soap & Other Products to Wash the Skin	$39,719,289	$41,034,176	$36,728,481	$39,403,435	$34,050,690	-3%	-7%	5.38%
4803	Toilet, Facial Tissue, Towel Or Napkin Stock And Similar Paper, Cellulose Fiber Wadding And Webs, In Rolls Or Sheets	$5,553,595	$5,788,516	$5,649,323	$4,890,114	$2,016,218	-18%	-64%	0.32%
4818	Personal Care Wipes, Diapers, Tampons	$102,986,712	$19,793,446	$19,010,803	$21,890,665	$20,523,778	-28%	8%	3.24%
5601	Sanitary Towels and Napkins	$18,812,564	$3,098,954	$4,668,135	$2,972,141	$3,840,630	-27%	-18%	0.61%
9603	Personal Care Brushes: Nail, Shaving, Tooth, etc	$16,720,696	$18,441,538	$17,075,294	$18,734,210	$18,909,621	2%	11%	2.99%
9605	Toilet Sets for Personal Travel	$141,590	$169,366	$131,670	$207,207	$103,272	-6%	-22%	0.02%
9619	Diapers and Fem Hygiene	NA	$87,200,300	$92,314,548	$96,574,762	$83,990,104	NA	-9%	13.26%
	Total Imports	$628,257,680	$613,340,596	$652,148,852	$662,007,971	$633,196,781	0%	-3%	100.00%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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Table 10: Imported Products Share of South Korea's Personal Care and Cosmetics Market

Importer	2011	% Market Share	2012	% Market Share	2013	% Market Share	2014	% Market Share	2015	% Market Share
US	$ 366,276,649	19%	$ 415,818,705	22%	$ 424,921,167	21%	$ 489,771,533	22%	$ 487,148,249	22%
France	$ 294,005,719	16%	$ 271,730,911	14%	$ 291,512,043	15%	$ 321,119,602	15%	$ 250,304,385	11%
Japan	$ 384,323,761	20%	$ 357,100,350	19%	$ 271,341,204	14%	$ 269,737,079	12%	$ 287,317,536	13%
EU 28	$ 556,001,042	30%	$ 553,877,813	29%	$ 597,961,157	30%	$ 651,345,830	30%	$ 597,582,043	27%
China	$ 135,598,741	7%	$ 148,980,803	8%	$ 180,489,993	9%	$ 211,920,044	10%	$ 264,123,453	12%
Other	$ 146,735,291	8%	$ 178,237,261	9%	$ 221,739,987	11%	$ 242,728,053	11%	$ 351,382,349	16%
Total	$ 1,882,941,203	100%	$ 1,925,745,843	100%	$ 1,987,965,551	100%	$ 2,186,622,141	100%	$ 2,237,858,015	100%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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2011-2015

Table 11: HS 34: Make Up Products, US Exports to South Korea

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to SK
3304	Make-Up & Skin-Care Preparations	$194,183,390	$212,211,412	$220,087,952	$237,047,916	$236,982,549	8%	4%	49%
330410	Lipstick, other prep	$17,303,864	$17,112,752	$12,124,311	$11,641,098	$12,047,045	-1%	-7%	2%
330420	Eye Make-Up	$5,536,333	$5,847,247	$7,011,331	$5,427,949	$8,693,886	24%	9%	2%
330430	Manicure & Pedicure Preparations	$4,461,490	$5,084,912	$6,304,982	$5,695,019	$6,287,483	0%	7%	1%
330491	Powder Make-Up Or Skin Care Preparations	$6,974,491	$3,811,086	$4,808,377	$6,152,336	$8,214,495	71%	3%	2%
330499	Beauty & Skin Care Prep	$159,907,212	$180,355,415	$189,838,951	$208,131,514	$201,739,640	6%	5%	41%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

Table 12: HS 35: Hair Care Products, US Exports to South Korea

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to SK
3305	Hair Care Products	$36,213,048	$43,689,185	$43,052,254	$50,439,434	$52,951,269	23%	8%	11%
330510	Shampoo	$26,952,407	$32,473,936	$31,463,094	$33,760,865	$36,340,080	16%	6%	7%
330520	Prep for Waiving and Straightening Hair	$116,537	$15,054	$18,363	$9,293	$105,269	473%	-2%	0%
330530	Hair Lacquer	$377,414	$575,133	$802,346	$733,111	$514,840	-36%	6%	0%
330590	Other Hair Products, inc. Color	$8,766,690	$10,625,062	$10,768,451	$15,936,165	$15,991,080	48%	13%	3%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

South Korea Personal Care and Cosmetics Trade
2011-2015

Table 13: HS 37: Cosmetic & Toilet Preparations, Inc Shaving, Bath Prep and Deodorants, US Exports to South Korea

HTS Code	Description	2011	2012	2013	2014	2015	3 YEAR AVG GROWTH	CAGR 2010-2015	%Share of 2015 US Exports to Aus
3307	Cosmetic & Toilet Prep	$20,471,126	$20,244,555	$25,206,177	$25,819,942	$26,489,402	10%	5%	5%
330710	Shaving Preparations	$2,667,640	$995,362	$1,084,758	$869,893	$1,114,365	10%	-16%	0%
330720	Personal Deodorants and Antiperspirants	$1,715,102	$2,964,079	$2,425,671	$2,708,320	$2,510,164	10%	8%	1%
330730	Perfumed Bath Salts And Other Bath	$1,821,759	$1,405,373	$1,672,534	$2,953,279	$3,062,795	10%	11%	1%
330790	Depilatories, Other Perfumery	$14,266,625	$14,879,741	$20,023,214	$19,288,450	$19,802,078	10%	7%	4%

Source: Trade Policy Information System (TPIS), if marked with a * source is Global Trade Atlas

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