

ASEAN Sensitive Skin Care - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The ASEAN sensitive skin care market size is expected to grow from USD 1.59 billion in 2024 to USD 2.48 billion by 2029, at a CAGR of 9.35% during the forecast period (2024-2029).

Key Highlights

- The ASEAN region comprises tropical countries like Thailand, Indonesia, Malaysia, and Singapore. The skin of people residing in these countries is more prone to irritation and sensitivity due to enhanced exposure to sunlight and high humidity weather effects. Not only does the climate impact the microbiome balance of the skin, but it also leads to numerous skin conditions like atopic dermatitis, eczema, redness, dark skin, acne, pigmentation, and dullness.
- Therefore, with rising disposable incomes and increasing focus on grooming habits and self-perceptions among emerging adults, there has been a significant rise in the demand for skin care products in the region. According to a survey by UN Comtrade, the value of cosmetics and toiletries imports from Japan to Singapore amounted to around USD 750.75 million in 2022.
- Moreover, companies are launching products targeting individuals with sensitive skin. For instance, in 2022, in collaboration with LABORE and other skin experts, Paragon launched a range of LABORE products designed especially for sensitive skin in low-climate countries. The product range comprises barrier revive cream, mild cleanser, hydration toner, physical sunscreen, and skin nutrition gel labeled as alcohol and fragrance-free, non-comedogenic, dermatologically tested, vegan, and cruelty-free. Such innovations, along with emerging minimalist and clean beauty trends, will likely create a positive outlook for the market during the study period.

ASEAN Sensitive Skin Care Market Trends

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Rising Inclination Towards Natural and Organic Formulations

- Consumers are increasingly becoming aware of synthetic chemicals used in skincare formulations and their potential side effects leading to various health issues like skin irritation, allergies, skin dullness, toxicity, etc. This is paving the way for enhanced demand for natural and organic skincare products market. Sensitive skin care products made of organic and natural ingredients do not leave any harmful impact on the skin and are generally non-toxic to the skin and hence are greatly demanded.
- The growing number of skin sensitivity conditions among a large population drives the sales of sensitive skin care products to prevent or treat such conditions. Therefore, players are capitalizing on this growing interest by introducing a range of organic skincare products containing plant-based, clean-label ingredients, with claims such as 'organic,' 'vegan,' 'natural,' 'chemical-free,' and 'cruelty-free.' For instance, in 2021, Singapore-based beauty start-up Sage & Ylang launched its first customizable microbiome beauty essence developed especially for sensitive skin. Such innovations are anticipated to provide a boost to the market in the coming years.
- Additionally, the existence of modern-age technology, resulting in the introduction of innovative solutions, especially in the sensitive skincare segment, is encouraging a high number of sensitive consumers who actively seek 'free-from' skin care products that helps address their skin issues like pigmentation, irritation, burn, and others. Thus, such factors are bound to support the ASEAN market's demand and growth for sensitive skin care products.

Indonesia Dominates the Market

- Indonesia currently occupies the largest share of the ASEAN-sensitive skincare market. This can be attributed to the increased focus on self-grooming products. Recently, natural ingredient-based products for sensitive skin have gained immense popularity among Indonesians, especially young adults who tend to research the ingredients in skincare products. Apart from this, the penetration of the Internet and the impact of social media beauty influencers on consumers' purchasing decisions are other significant factors driving the demand for smart skincare in the country through e-commerce channels.
- Therefore, companies are focusing on online distribution channels to expand their sales. For instance, Bioderma offers Bioderma Sensibio Mild Cleansing Foaming Gel Sensitive Skin for consumers with sensitive skin. The brand offers its products nationwide through Care to Beauty, an online platform. Moreover, rising purchasing power has created a demand for imported niche and premium products. As a result, brands offer well-researched products led by innovations in the market, thereby influencing the market positively.
- Indonesian women prefer trusted brands and seek products that are made for their skin type. The growing media coverage of skincare ingredients and products, particularly online, with consumers becoming more likely to follow the recommendation of friends or social media influencers, is likely to support the growth of the market. The rising incidence of sensitive skin allergies or issues like eczema, rosacea, and others among Indonesian consumers is likely to fuel the demand for sensitive skin care products. For instance, in 2022, according to the ZAP Clinic, 26.9% of Generation Y consumers are dealing with sensitive (redness and irritated) skin issues.

ASEAN Sensitive Skin Care Industry Overview

The ASEAN-sensitive skincare products market is fragmented and comprises regional and international competitors. Some key market players are Johnson & Johnson, Unilever PLC, L'Oreal SA, GlaxoSmithKline PLC, and Beiersdorf AG. These global players are focusing on leveraging opportunities posed by the emerging markets of Asia-Pacific, like Thailand, Indonesia, and Vietnam, to expand their revenue base.

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These players are also investing in R&D and marketing and expanding distribution channels to maintain a leading position in the market. These leading companies have an extensive product portfolio in the sensitive skin care product market, including natural ingredients and innovation, among others. Additionally, economies of scale and high brand loyalty among consumers give these companies an upper edge.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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