Colour Cosmetics

November 2011

LIST OF CONTENTS AND TABLES

COLOUR COSMETICS IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

HEADLINES

- Current value sales of colour cosmetics are up by 7% to reach AED428 million in 2010
- Although growth of less than 10% is witnessed in 2010, product and brand loyalty help colour cosmetics weather economic downturn
- Nail products see fastest current value growth of 8% in 2010
- Unit prices remain stable in 2010, with -0.2% being the highest price decrease recorded for a category
- Bourjois leads fragmented colour cosmetics with a 10% retail value share in 2010
- Colour cosmetics is expected to post a constant value CAGR of 5% over the forecast period

TRENDS

- Sales of colour cosmetics grew by 7% to reach AED428 million in 2010, although this was a lower growth rate compared to the 11% review period CAGR, which mainly reflected lower volumes as well as small-scale trading down to cheaper brands.
- Colour cosmetics continued to benefit from the United Arab Emirates' cosmopolitan community, which translates into varied trends and looks, and hence varied colour cosmetics. Demand from Asian consumers is influenced by Bollywood stars, while local nationals and Middle Eastern expatriates follow the trends adopted by Middle Eastern pop and cinema stars, especially from Egypt and Lebanon. Darker skin tones encourage the use of more colour, whilst the paler-skinned expatriate population demands more subtle tones. In addition, the exposure of the United Arab Emirates' female consumers in general to the various nationalities present fuels demand for a wider and innovative range of colour cosmetics.
- In spite of the negative impact of the recession, demand for colour cosmetics has been driven by the expanding retail landscape, the constant launch of new product developments, the United Arab Emirates' cosmopolitan population and, more importantly, the large young female population in the United Arab Emirates.
- Abu Dhabi again hosted Beauty Vision, the capital's beauty world-like exh bition. More than 100 companies and 1,000 products in the beauty and personal care industry showcased in November 2010. With its neighbour Dubai deeply immersed in the global financial crisis, oil-rich Abu Dubai aims to emerge as the region's new business hub. Beauty Vision has offered its participants three unique experiences entitled Vision Match, Vision Concierge and Vision Lounge.
- Nail products posted fast growth in 2010 with a current sales increase of 8%. Lip products also did well, at 8%, followed by eye make-up and facial make up, at about 7%.
- Lip products benefit from the different nationalities present in the United Arab Emirates, each with different cultural preferences and styles. Within lip liner/pencil, Asian expatriates prefer mass brands Revlon ColorStay and Mikyajy 22K, while European expatriates mostly go for

premium brands l ke Clinique Quick Liner for Lips. Matt lipsticks grew in popularity and as did darker shades.

- Eye liner/pencil remained a key category within colour cosmetics – with current value growth of 8% in 2010 and 10% of total sales of colour cosmetics in this year. This growth was due to the well-established demand for eye liner/pencil in the United Arab Emirates and a shift from the pencil to the liquid eyeliner, especially amongst high-income earners, in response to current make-up trends.
- Facial make-up products are the most popular in the United Arab Emirates, as they accounted for 33% of total value sales of colour cosmetics in 2010. Facial make-up is commonly used in contrast to eye make-up, lip and nail products. Its popularity is also related to climactic factors as women generally do not prefer wearing eye make-up during the morning; but they would still use facial make-up such as a powder base or liquid foundation and blush.
- The large percentage of low- and middle-income Asian expatriates secures demand for economy and standard brands. In eye make-up, for example, certain brands have succeeded in establishing a presence amongst these consumer groups, namely NYX's Candy Glitter Liner and Mikyajy's Sabaya Glitter Eyes, thanks to their attractive prices of AED30 and AED45, respectively.
- Premium outlets such as Paris Gallery and Areej continue to add stores as new retail space becomes available. Premium cosmetics continues to be a significant product area amongst both resident consumers and tourists as prices remain just slightly above those available in duty-free stores and significantly cheaper than in most Western countries.

COMPETITIVE LANDSCAPE

- Bourjois led colour cosmetics with a retail value share of 10% in 2010, benefiting from the popularity of Chanel in the premium range and Bourjois in the standard range. The Chanel and Bourjois brands held retail value shares of 6% and 5%, respectively, in 2010, banking on their established customer loyalty and key launches during the year.

PROSPECTS

- Colour cosmetics is expected to post a constant value CAGR of 5% over the forecast period. This rate is similar to but higher than the CAGR achieved over the review period, indicating that colour cosmetics in general is fairly resistant to economic pressures, but also that expected economic recovery in 2011 will sustain growth for the forecast period.

CATEGORY DATA

Table 1 Sales of Colour Cosmetics by Category: Value 2005-2010

AED million

	2005	2006	2007	2008	2009	2010
Eye Make-Up						
Facial Make-Up						
Lip Products						
Nail Products						
Colour Cosmetics						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Colour Cosmetics by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 Total
Eye Make-Up			
Facial Make-Up			
Lip Products			
Nail Products			
Colour Cosmetics			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Colour Cosmetics Premium Vs Mass % Analysis 2005-2010

% retail value rsp

	2005	2006	2007	2008	2009	2010
Premium						
Mass						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Colour Cosmetics Company Shares 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Colour Cosmetics Brand Shares by GBN 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010

Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Colour Cosmetics Premium Brand Shares by GBN 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010
Total		100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Forecast Sales of Colour Cosmetics by Category: Value 2010-2015

AED million

	2010	2011	2012	2013	2014	2015
Eye Make-Up						
Facial Make-Up						
Lip Products						
Nail Products						
Colour Cosmetics						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 8 Forecast Sales of Colour Cosmetics by Category: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Eye Make-Up		
Facial Make-Up		
Lip Products		
Nail Products		
Colour Cosmetics		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 9 Forecast Colour Cosmetics Premium Vs Mass % Analysis 2010-2015

% retail value rsp

	2010	2011	2012	2013	2014	2015
Premium						
Mass						
Total						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

COLOUR COSMETICS IN THE UNITED ARAB EMIRATES - COMPANY PROFILES

KAMAL OSMAN JAMJOOM EST IN BEAUTY AND PERSONAL CARE (UNITED ARAB EMIRATES)

Strategic Direction

~ After launching Mikyajy in 1999, Kamal Osman Jamjoom has been focusing on developing the brand as a regional cosmetics retail concept and thereafter to go global through expansion in other emerging markets and Europe.

Key Facts

Summary 1 Kamal Osman Jamjoom Est: Key Facts

Full name of company:	Kamal Osman Jamjoom Trading Establishment (KOJ)
Address:	4th Floor, Unit 422, Sultan Business Centre, Oud Metha Road, Dubai, United Arab Emirates
Tel:	+971 (4) 335 5232
Fax:	+971 (4) 335 5231
www:	www.kojamjoom.com
Activities:	Retail of cosmetics, lingerie and children's educational toys

Source: EuromonitorIntemationalfrom companyreports, companyresearch, trace press, trade sources

Summary 2 Kamal Osman Jamjoom Est: Operational Indicators

	2008	2009	2010
Net sales	AED16.7 million	AED21.3 million	AED23.3 million

Source: EuromonitorIntemationalfrom companyreports, companyresearch, trade press, trade sources

Company Background

~ Kamal Osman Jamjoom (KOJ) was established in 1987 in the Kingdom of Saudi Arabia as a sole proprietorship of Sheikh Kamal Osman Jamjoom. KOJ is part of the Kamal Osman Jamjoom Group, a diversified retail conglomerate with operations in Saudi Arabia, the United Arab Emirates, Oman and Qatar. The Group has the following legal entities in the United Arab Emirates: Kamal Osman Jamjoom Trading Establishment (Dubai), Early Learning Centre for

Toys (Dubai), Mikyajy Trading (Dubai), Nayomi Trading (Dubai), Jamjoom Decoration (Dubai) and Jamjoom Decoration (Ras Al Khaimah).

- KOJ is currently one of the leading retailers in the Middle East, managing four branded retail concepts, Mikyajy and Nayomi being its own brands, and The Body Shop (KSA) and The Early Learning Centre (GCC) as franchises. The retail concept was launched in 2002 in Saudi Arabia, and has expanded its Mikyajy branded network to 119 outlets across the GCC. Nayomi is engaged in the retailing of Nayomi branded lingerie, nightwear, bridalwear, and other activewear. It should be highlighted that Nayomi is the largest retailer of women's lingerie in the Middle East with a retail network of 117 outlets spread across 22 cities.
- KOJ Group has 400 outlets in the Gulf Cooperation Council (GCC) region that are distributed as follows. Firstly, the group is The Body Shop's franchisee in the Kingdom of Saudi Arabia only; it operates 88 outlets in this country. Secondly, the group is the franchisee for UK-based educational toy retailer Early Learning Centre and runs 45 outlets across the GCC, with 21 of them in the United Arab Emirates. Thirdly, Nayomi operates 117 outlets in the GCC, with 27 of them in the United Arab Emirates. Finally, Mikyajy has a network of 150 outlets spread across the 6-nation GCC, with 45 outlets in the United Arab Emirates.
- In June 2009 Mikyajy launched its new diffusion line, Minx. This fun label experiments with vivid eye shades and luscious lip colours. Not only is it promoted to give a long-lasting colour, it also comes at attractive prices that help its customers weather any downturn.

Production

- KOJ was initially established with a view to supply the local market through importing, and it currently imports around 80% of its purchases. The company's main sources are Ever New Metalbox (Hong Kong), Corialys (France), Care Full Colours (Germany), Beauty Nuri (South Korea), Schwan-STABILO Cosmetics (Germany), H&M Gutberlet (Germany), Invima Trading AG (Switzerland) and Mei Shual Cosmetics (Taiwan).
- With the help of its strong product development team and the volumes involved in its line of business, the company proposed the launch of its own line of in-house products under the brand names of 22k, Skin FX, Sabaya etc. This resulted in an increased investment in the stock of these products, which has been made by the company out of its own accruals.
- The company's sales are broken down into 25% directed to the local market, with the balance being exported. The company's main export markets are neighbouring GCC countries. In addition, KOJ is also exploring opportunities to tap into other emerging and Western markets.

Competitive Positioning

- The company's value share has grown, especially towards the end of the review period, thanks to its attractive pricing that sustained demand from middle-income earners even in a time of recession. Within beauty and personal care as a whole the company ranked 24th in 2010 with a retail value share of 0.7% as it is relatively small when compared to big multinationals active in the market. However, within colour cosmetics the company holds a 5% value share and is ranks eighth.
- On account of being a GCC brand, M kyajy is well positioned to cater to consumer preferences in this part of the world. Mikyajy has a good understanding of consumer trends and lifestyles, taking into consideration that it targets GCC female consumers.

Product type	Value share	Rank
Mass colour cosmetics	10.1%	4

Source: EuromonitorInternationalfrom companyreports, companyresearch,trade sources.trade interviews

BEAUTY AND PERSONAL CARE IN THE UNITED ARAB EMIRATES - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Economy Slow To Recover From Crisis

The economic slowdown that hit the UAE in mid 2008 continues to dampen demand as population growth remains constrained and consumer spending is lower due to the uncertain climate. Nonetheless, all categories are forecasted to grow at higher rate than of the review period in constant terms, reflecting the expected recovery of the economy over the next five years.

New Products and Promotions Stimulate Demand

Manufacturers responded to lower consumer demand by stimulating the market with new products and promotional activities. New products were rife in skin care with anti-aging and antiwrinkle creams leading new launches. Promotions in oral care and in soap helped keep sales buoyant and were led by the major manufacturers keen to keep hold of market share.

Domestic Manufacturers Fall Further Behind International Brands

Domestic manufacturers continued to struggle in most areas of beauty and personal care, with little presence in baby care, bath and shower products, deodorants and oral care. Cosmetics and fragrances fared better, with stronger representation and competitive products from Kamal Osman Jamjoon (cosmetics), Ajmal International and Rasasi Perfumes (both fragrances).

Supermarkets/hypermarkets Remain in Control of Distribution

In addition to being positioned as the domain of weekly shopping, supermarkets/hypermarkets are reinforcing their lead in the distribution of beauty and personal care products. The low consumer confidence has clearly come to benefit these channels, particularly due to their regular promotions and growing interest in their private label beauty and personal care lines.

A Delayed Recovery

Although the global economy had showed signs of recovering by the second half of 2009, the United Arab Emirates has remained mired in recession. The Dubai debt crisis, which erupted in November 2009, has continued to slow economic recovery, and has accordingly fed through into the beauty and personal care industry. Nonetheless, this is expected to be reversed as forecast growth rates are higher than the review period reflecting the expected economic recovery.

MARKET DATA

Table 1 Sales of Beauty and Personal Care by Category: Value 2005-2010

AED million

	2005	2006	2007	2008	2009	2010
Baby Care						
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Oral Care excl Power Toothbrushes						
Skin Care						
Sun Care						
Sets/Kits						
Premium Cosmetics						
Mass Cosmetics						
Beauty and Personal Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note 1: Premium cosmetic sales are additionally included within baby care, bath and shower, deodorants, colour cosmetics, hair care, fragrances, skin care, sun care and sets/kits.
Note 2: Sum of categories is greater than market size because the four men's toiletries categories are included in men's grooming as well as in bath and shower, deodorants, hair care and skin care.

Table 2 Sales of Beauty and Personal Care by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 Total
Baby Care			
Bath and Shower			
Colour Cosmetics			
Deodorants			
Depilatories			
Fragrances			
Hair Care			
Men's Grooming			
Oral Care			
Oral Care excl Power Toothbrushes			
Skin Care			
Sun Care			
Sets/Kits			
Premium Cosmetics			
Mass Cosmetics			
Beauty and Personal Care			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note 1: Premium cosmetic sales are additionally included within baby care, bath and shower, deodorants, colour cosmetics, hair care, fragrances, skin care, sun care and sets/kits.
Note 2: Sum of categories is greater than market size because the four men's toiletries categories are included in men's grooming as well as in bath and shower, deodorants, hair care and skin care.

Table 3 Sales of Premium Cosmetics by Category: Value 2005-2010

AED million

	2005	2006	2007	2008	2009	2010
Premium Baby Care						
Premium Bath and Shower						
Premium Colour Cosmetics						
Premium Deodorants						
Premium Fragrances						
Premium Hair Care						
Premium Skin Care						
Premium Sun Care						
Premium Sets/Kits						
Premium Cosmetics						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note: Premium cosmetic sales are additionally included within baby care, bath and shower, deodorants, colour cosmetics, hair care, fragrances, skin care, sun care and sets/kits.

Table 4 Sales of Premium Cosmetics by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 Total
Premium Baby Care			
Premium Bath and Shower			
Premium Colour Cosmetics			
Premium Deodorants			
Premium Fragrances			
Premium Hair Care			
Premium Skin Care			
Premium Sun Care			
Premium Sets/Kits			
Premium Cosmetics			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note: Premium cosmetic sales are additionally included within baby care, bath and shower, deodorants, colour cosmetics, hair care, fragrances, skin care, sun care and sets/kits.

Table 5 Beauty and Personal Care Company Shares by NBO 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010

Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Beauty and Personal Care Company Shares by GBO 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010

Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Beauty and Personal Care Brand Shares by GBN 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010

Total			100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Beauty and Personal Care by Distr bution Format: % Analysis 2005-2010

% retail value rsp

	2005	2006	2007	2008	2009	2010
Store-Based Retailing						
- Grocery Retailers						
- - Discounters						
- - Small Grocery Retailers						
- - - Convenience Stores						
- - - Forecourt Retailers						
- - - Independent Small Grocers						
- - Supermarkets/ Hypermarkets						
- - Other Grocery Retailers						
- Non-Grocery Retailers						
- - Health and Beauty Retailers						
- - - Beauty Specialist Retailers						
- - - Chemists/Pharmacies						

- - - Parapharmacies/ Drugstores						
- - - Other Health and Beauty Retailers						
- - Mixed Retailers						
- - - Department Stores						
- - - Mass Merchandisers						
- - - Variety Stores						
- - - Warehouse Clubs						
- - Outdoor Markets						
- - Other Non-Grocery Retailers						
Non-Store Retailing						
- Direct Selling						
- Homeshopping						
- Internet Retailing						
- Vending						
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Beauty and Personal Care by Category and by Distribution Format: % Analysis 2010

% retail value rsp

	BC	BS	CC	D	DP	F
Store-Based Retailing						
Grocery Retailers						
Discounters						
Small Grocery Retailers						
Convenience Stores						
Forecourt Retailers						
Independent Small Grocers						
Supermarkets/Hypermarkets						
Other Grocery Retailers						
Non-Grocery Retailers						
Health and Beauty Retailers						
Beauty Specialist Retailers						
Chemists/Pharmacies						
Parapharmacies/Drugstores						
Other Health and Beauty Retailers						
Mixed Retailers						
Department Stores						
Mass Merchandisers						
Variety Stores						
Warehouse Clubs						
Outdoor Markets						
Other Non-Grocery Retailers						
Non-Store Retailing						
Direct Selling						
Homeshopping						
Internet Retailing						
Vending						
Total	100.0	100.0	100.0	100.0	100.0	100.0

	HC	MG	OC	SC	SU	SK
Store-Based Retailing						
Grocery Retailers						
Discounters						
Small Grocery Retailers						
Convenience Stores						
Forecourt Retailers						
Independent Small Grocers						
Supermarkets/Hypermarkets						
Other Grocery Retailers						
Non-Grocery Retailers						
Health and Beauty Retailers						
Beauty Specialist Retailers						
Chemists/Pharmacies						
Parapharmacies/Drugstores						
Other Health and Beauty Retailers						
Mixed Retailers						
Department Stores						
Mass Merchandisers						
Variety Stores						
Warehouse Clubs						
Outdoor Markets						
Other Non-Grocery Retailers						
Non-Store Retailing						
Direct Selling						
Homeshopping						
Internet Retailing						
Vending						
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: BC = baby care; BS = bath and shower; CC = colour cosmetics; D = deodorants; DP = depilatories; F = fragrances; HC = hair care; MG = men's grooming; OC = oral care; SC = skin care; SU = sun care; SK = sets/kits

Table 10 Forecast Sales of Beauty and Personal Care by Category: Value 2010-2015

AED million

	2010	2011	2012	2013	2014	2015
Baby Care						
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Oral Care excl Power Toothbrushes						
Skin Care						

Sun Care
Sets/Kits
Premium Cosmetics
Mass Cosmetics
Beauty and Personal Care

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note 1: Premium cosmetic sales are additionally included within baby care, bath and shower, deodorants, colour cosmetics, hair care, fragrances, skin care, sun care and sets/kits.

Note 2: Sum of categories is greater than market size because the four men's toiletries categories are included in men's grooming as well as in deodorants, skin care, bath and shower and hair care.

Table 11 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Baby Care		
Bath and Shower		
Colour Cosmetics		
Deodorants		
Depilatories		
Fragrances		
Hair Care		
Men's Grooming		
Oral Care		
Oral Care excl Power Toothbrushe		
Skin Care		
Sun Care		
Sets/Kits		
Premium Cosmetics		
Mass Cosmetics		
Beauty and Personal Care		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note 1: Premium cosmetic sales are additionally included within baby care, bath and shower, deodorants, colour cosmetics, hair care, fragrances, skin care, sun care and sets/kits.

Note 2: Sum of categories is greater than market size because the four men's toiletries categories are included in men's grooming as well as in deodorants, skin care, bath and shower and hair care.

Table 12 Forecast Sales of Premium Cosmetics by Category: Value 2010-2015

AED million

	2010	2011	2012	2013	2014	2015
Premium Baby Care						
Premium Bath and Shower						
Premium Colour Cosmetics						
Premium Deodorants						
Premium Fragrances						
Premium Hair Care						
Premium Skin Care						
Premium Sun Care						
Premium Sets/Kits						
Premium Cosmetics						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Premium cosmetic sales are additionally included Within baby care. bath and shower. deodorants, colour cosmetics, hair care, fragrances, skin care, sun care and sets/kits.

Table 13 Forecast Sales of Premium Cosmetics by Category: % Value Growth 2010-2015

% constant value growth

Premium 8aby Care
Premium 8ath and Shower
Premium Colour Cosmetics
Premium Deodorants
Premium Fragrances
Premium Hair Care
Premium Skin Care
Premium Sun Care
Premium Sets/Kits
Premium Cosmetics

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Premium cosmetic sales are additionally included Within baby care. bath and shower, deodorants, colour cosmetics, hair care, fragrances, skin care, sun care and sets/kits.

DEFINITIONS

This report analyses the market for 8eauty and Personal Care in the United Arab Emirates. For the purposes of the study, the market has been defined as follows:

~ 8aby care
~ 8ath and shower
~ Colour cosmetics
~ Deodorants
~ Depilatories
~ Fragrances
~ Hair care
~ Men's grooming
~ Oral hygiene
~ Skin care
~ Sun care
~ Sets/kits

Sources

Sources used during research include the following:

Summary 1 Research Sources

Official Sources	Abu Dhabi Chamber of Commerce & Industry
	Ajman Chamber of Commerce & Industry
	Dubai Chamber of Commerce & Industry
	Dubai Statistics Center

	Fujairah Chamber of Commerce & Industry
	Shaqah Chamber of Commerce & Industry
	Umm Al Quwain Chamber of Commerce & Industry
Trade Associations	Al Khaimah Chamber of Commerce, Industry & Agriculture
Trade Press	Arabian Business
	Gulf News
	Khaleej Times
	Noozz
	Red Hot
Company Sources	Ajmal Perfume
	Al Shaya Group
	Alberto-Culver
	Alphamed Group
	Avon Al Hathboor
	Avon Products Inc
	Beiersdorf Middle East
	Colgate-Palmolive
	Coty
	CPO
	Himalaya Drug Co, The
	Johnson & Johnson Middle East FZE
	Jordan AS
	Kamal Osman Jamjoom Est
	L'Oreal Middle East
	MAF Carrefour Hyperrnarl<ets
	MH Alshaya Co
	PZCussons
	Rasasi Perfumes Industry LLC
	Sara Trident Emirates LLC
	The Himalaya Drug Co
	Unilever Arabia FZE
	Unilever Group
	Ameinfo.com