

The Shampoo Market in Southeast Asia

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Recently, Southeast Asian countries have been growing very rapidly with their rate of economic growth exceeding the average of the world. Their exports to the USA and Japan have been growing. Thus, a chain reaction occurs as economic growth in one country activates growth in other countries. This is a characteristic phenomenon. Prices of consumer goods have also been growing rapidly. Cars, color televisions and VCRs are in great demand, and are being watched as the most active area from all over the world. This article will outline the consumer's shampooing habits, the current picture of the shampoo market and the fragrances

used in the leading brands of shampoos. Some data on the perception of common fragrances will also be included.

The Countries in Southeast Asia

The countries we refer to are Hong Kong, Singapore, Taiwan, Malaysia, Thailand, Indonesia and the Philippines. Figure 1 gives specifics on each country, such as population and GNP. The precipitation is very heavy (between 2,000 to 4,000 mm/year) and these countries are considered to be tropical rain forests, since almost all of them are peninsulas or islands.

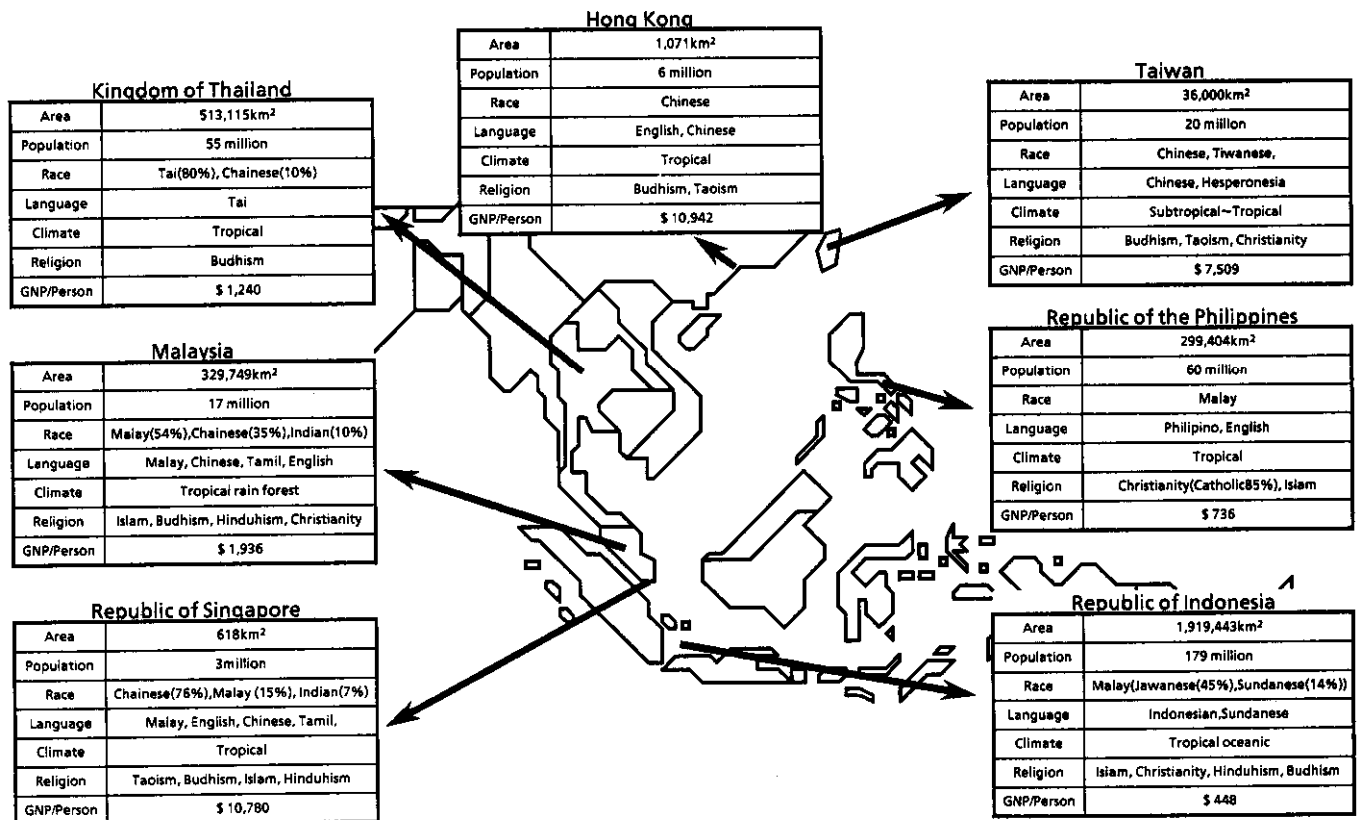


Figure 1. Countries in Southeast Asia.

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Table I. Shampooing habit in Southeast Asia
Frequency of shampooing per week

	≤ once	2~3 times	4~6 times	7 times
TAIWAN	2 %	83 %	10 %	5 %
HONG KONG	2	60	30	8
SINGAPORE	0	51	31	18
MALAYSIA	0	73	12	15
THAILAND	0	52	21	27
INDONESIA	38	54	3	5
PHILLIPINES	0	4	42	54
GERMANY	11	63	12	14
JAPAN	0	14	48	38

Table III. Shampooing habit in Southeast Asia
Time of the day for shampooing

	Morning	Daytime	Night (Evening)	Others
TAIWAN	7 %	12 %	81 %	0 %
HONG KONG	38	10	52	0
SINGAPORE	38	21	38	0
MALAYSIA	25	16	59	0
THAILAND	33	7	60	0
INDONESIA	56	7	37	0
PHILLIPINES	60	2	5	33
GERMANY	45	5	26	24
JAPAN	6	2	92	0

Hong Kong, Singapore and Taiwan are the leading countries in GNP/person, followed by Malaysia and Thailand. For the most part, these countries consist of three races. The Chinese are in Hong Kong, Taiwan and Singapore; the Malaysians are in Malaysia, Indonesia and the Philippines; and the Thais are in Thailand. In Hong Kong, people speak both English and Chinese. In Malaysia, people speak the local language as well as English, Chinese and Tamil. In the Philippines, the native language is Philipino, the official language being English. These countries also vary in religion. In Taiwan, we find Buddhism, Taoism and Christianity; in Malaysia, Islam, Buddhism, Hinduism and Christianity. It's obvious that these countries greatly vary in race, language and culture.

Shampooing Habits in Southeast Asia

Table I-IV show the shampooing habits in Southeast Asia. These results were obtained from a survey conducted from 1985 to 1988 by Kao Corporation. The participants were all women. Although it is rather out of date, at least it gives an idea of the shampooing habits in Southeast Asia.

Table II. Shampooing habit in Southeast Asia
The number of times of shampooing per one time

	once	twice	3 times
TAIWAN	42 %	58 %	0 %
HONG KONG	24	73	3
SINGAPORE	38	50	13
MALAYSIA	65	35	0
THAILAND	7	72	21
INDONESIA	13	74	13
PHILLIPINES	90	10	0
GERMANY	56	44	0
JAPAN	52	48	0

Table IV. Shampooing habit in Southeast Asia
Usage of conditioner

	Everytime	Sometimes	Never
TAIWAN	74 %		26 %
HONG KONG	66	14	21
SINGAPORE	63	25	8
MALAYSIA	87	14	-
THAILAND	59	20	21
INDONESIA	9		81
PHILLIPINES	42		58
GERMANY	3	62	35
JAPAN	72	7	21

In Southeast Asia it is not customary to take a tub bath. Instead, most people shower two times per day, in the morning and the evening. Most housewives shower three times per day. Except for countries that have a winter season (Taiwan and Hong Kong, etc.), water is obtained from a storage tank and then poured over the body with a scoop. People generally wash themselves with their hands, but in urban areas, towels are used more recently.

Table I shows the frequency of shampooing per week in each country. The frequency of shampooing is about three times per week on the average (even more frequently among young girls in Japan). It is customary to shower in the morning. In the Philippines, half of the women shampoo every day. The factor of religion and climate influences this data. Table II shows the number of shampoo applications per washing. We find relatively many people lather twice per shampoo. In the Philippines, almost all women lather only once, but more frequently. High frequency may be related to this habit.

Table III shows shampooing time of the day. In Taiwan, women shampoo only at night (as in Japan). But in the other

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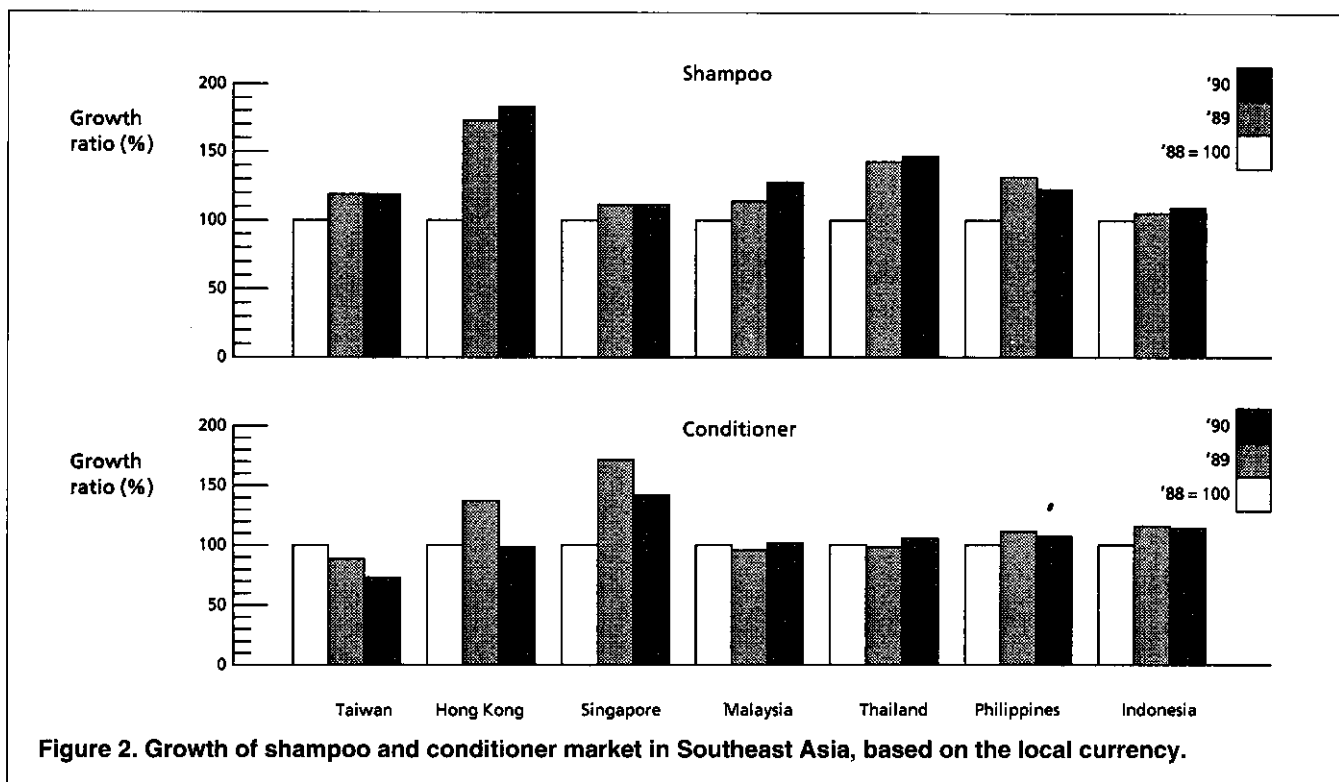


Figure 2. Growth of shampoo and conditioner market in Southeast Asia, based on the local currency.

Table V. Market size of shampoo and conditioner in Southeast Asia

	in 1990			
	Shampoo market		Conditioner market	
	Consumption (million \$)	Consumption /capita (\$)	Consumption (million \$)	Consumption /capita (\$)
TAIWAN	98.1	4.9	13.4	0.7
HONGKONG	31.4	5.2	7.8	1.3
SINGAPORE	18.8	6.3	5.2	1.7
MALAYSIA	24.3	1.4	2.7	0.2
THAILAND	84.0	1.5	17.8	0.3
INDONESIA	65.4	0.4	4.5	0.03
PHILIPPINES	34.1	0.6	7.9	0.1
JAPAN	817.2	6.6	419.0	3.4

countries, women shampoo in the morning or at night. Muslims have a custom of praying in the early morning and then purifying their body, so in Malaysia and Indonesia, there are many people shampooing in the morning. In the Philippines, they may shampoo irregularly, such as showering after an outing. Table IV shows the habit of using conditioner. We find a high usage of conditioner in each country except in the Philippines and Indonesia. Since hair care consciousness is very high, we are convinced of the prosperity of many conditioning shampoos on the market.

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Next, let's examine the shampoo market in Southeast

Asia. Table V shows the market share of shampoos and conditioners. The total market share of shampoo is relatively large in Taiwan, Thailand and Indonesia. On the other hand, the consumption per capita is high in Singapore, Taiwan and Hong Kong, which may be related to their GNP. The total market share of conditioners is similar to shampoos, but on a smaller scale. We hope this market continues to grow in the future. Figure 2 shows the growth of the shampoo and conditioner market in Southeast Asia. The growth rate is based on the market size from 1988 through 1990. Here, each country's market size is based on the local currencies. Steady growth is observed in each country. Perhaps this is due to the recent introduction of two-in-one formula shampoos. On the other hand, this activation made no progress in the conditioner market.

Classification of Shampoo

Table VI shows the shampoo brands available in Southeast Asia. They are divided into the following three basic categories according to their function: normal, two-in-one and medicated formulas. The typical brands of normal shampoo are Sunsilk by Lever, Feather by Kao and Palmolive by Colgate. The popular claim of this category is that it is mild and leaves the hair shiny afterwards. These shampoos contain seaweed extract and protein as conditioning ingredients, are pH-balanced and have mild surfactants to reduce damage to the hair. Other shampoos claim that they give appropriate texture according to the hair type. Sunsilk claims its mildness is due to coconut milk. Feather offers hair protection with protein. Palmolive claims special care for Asian hair.

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Table VI. Classification of shampoo in Southeast Asia

Category	Example	Product Claim
Normal	Sunsilk	WITH COCONUT MILK FOR DELICATE HAIR It's gotta be white! The only 2 in 1 shampoo with coconut milk, Lavishes each delicate strand with natural care! Makes delicate hair devastating.
	Feather	PROTEIN CONDITIONER Hair protection starts with a conditioner that's compatible with your hair.
	Palmolive	SHAMPOO WITH CONDITIONER SPECIAL CARE FOR ASIAN HAIR We're gonna stand out!
2 in 1	Rejoice	Body-building. Body-building with New Extra-Body Rejoice Introducing the One-Step Workout for fine, limp hair.
	Sifone	THE REVOLUTINARY 2 IN 1 SHAMPOO & CONDITIONER Gently Cleans, Thoroughly Conditions.
Medicated	Head & Shoulders	Oh Dandruff! Mmm..... Should you know the person whose agony come from even a bit of dandruff, you will certainly make up your mind to use HEAD & SHOULDERS GOOD-BYE DANDRUFF
	Merit	Refreshing! DANDRUFF CONTROL WITH MICRO Z-PT

This category has many types of claims and holds the biggest market. And finally, a shampoo known as black shampoo is also included in this category. This shampoo contains henna extract and makes hair appear blacker and shinier. It is sold in Indonesia and the Philippines.

The second shampoo category, the two-in-one type, has been available in the USA and Southeast Asia since 1987. Rejoice by Procter & Gamble (P&G) and Sifone by Kao are two of the leading brands. This category has been growing enormously since its launch and has a very promising future. Rejoice introduces the one-step workout for fine and limp hair and Sifone claims gentle cleansing ability and conditioning effect.

The third category, the medicated type, is anti-dandruff and anti-itch. Two of the major brands are Head and Shoulders by P&G and Merit by Kao. This category has not grown very rapidly in the past, but ever since the two-in-one type was launched, medicated shampoos have been growing very rapidly. Head & Shoulders claims its credibility. Merit claims dandruff control by micro Z-pt.

According to the basic concepts, we classified the shampoo market into three major categories. Recently, the overlapping of these three has been very obvious. As seen in Rejoice and Sifone, some anti-dandruff types have been introduced from the two-in-one type. On the other hand, Head & Shoulders, which is originally a medicated type, has produced a two-in-one type. And as seen in Sunsilk, Lux and Johnson & Johnson (J&J), they also have introduced two-in-one types. As seen in these samples, recently the unification and combination of functions have been the trend.

The Leading Manufacturers of Shampoo in Southeast Asia

Table VII shows the market share of major manufacturers in each Southeast Asia country. The three top manufacturers,

Table VII. Leading manufactures of shampoo in Southeast Asia

	KAO	LEVER	PROCTER & GAMBLE	OTHERS	
TAIWAN	21 %	18 %	13 %	J & J	6 %
HONG KONG	32	3	34	J & J WELLA COLGATE	4 5 1
SINGAPORE	32	5	26	GINVERA LION	6 5
MALAYSIA	15	5	11	UNZA CLAIROL J & J	17 6 6
THAILAND	20	45	13	LION CLAIROL REVLON J & J WELLA	5 4 2 1 1
INDONESIA	8	67	5	LION REVLON WELLA	4 1 1
PHILIPPINES	6	29	14	COLGATE WELLA J & J	29 5 4
JAPAN*	20	9	6	SHISEIDO LION	11 10

* : data in 1989

Table VIII. Leading brands and market shares in Taiwan

MANUFACTURER	BRAND	SHARE
KAO	FEATHER	8 %
	SIFONE	7
	PURE	5
	MERIT	1
LEVER	LUX	9
	PAILAN	7
	TIMOTEI	2
PROCTER & GAMBLE	PERT PLUS	5
	HEAD & SHOULDERS	4
	PANTENE	4
J & J	JOHNSON'S BABY	6

Kao, Lever and P&G, have popular brands. And other major manufacturers are also shown in this table. The shares are shown according to the quantity in 1990. As seen in this table, Kao and P&G are doing very well in Taiwan, Hong Kong and Singapore. While Lever has high shares in Thailand, Indonesia and the Philippines, Colgate has a high share in the Philippines. Not only have several international companies gained a high market share in these countries, but also Malaysia's own manufacturer, Unza, is doing very well. In the next section, we would like to look further into each country, and add some information on fragrances.

Fragrance Study of Major Brands in Southeast Asia

Taiwan: Table VIII shows the leading brands in Taiwan;

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Table IX. Product claims and fragrances of leading brands in Taiwan
N = Normal; D = Dry; O = Oily

BRAND	CONCEPT	VARIANT	FRAGRANCE
FEATHER (KAO)	Normal	Soft & moisture	Floral woody balsamic amber
		Cool & smooth	Herbal minty floral citrus fruity
SIFONE (KAO)	2 in 1	N/D	Fruity floral green citrus
	2 in 1 / Anti dandruff	N/D	Fruity floral green citrus
PURE (KAO)	Normal	Fresh	Citrus fruity musky
		Moisture	Floral fruity citrus musky
LUX (LEVER)	Normal	Fresh	Floral green woody balsamic fruity
		Moisture	Floral green woody balsamic fruity
	2 in 1		Citrus fruity green aldehydic floral
PAILAN (LEVER)	Normal	Lecithin	Floral aldehydic woody powdery
		Aloe Vera	Floral green fruity woody musky
		Silk protein	Floral aldehydic woody balsamic
		Lanolin	Citrus fruity floral green
	2 in 1		Citrus fruity floral green
TIMOTEI (LEVER)	Normal	Mild	Herbal green floral woody
		Herb honey	Citrus fruity green floral balsamic
PERT PLUS (P & G)	2 in 1	N / D / O / Fine hair	Floral green musky woody Hyacinth
	2 in 1 / Anti dandruff	N to D/O and Fine	Floral green musky woody Hyacinth
HEAD & SHOULDERS (P & G)	Anti dandruff	N to O / N to D	Herbal green floral citrus woody
	Anti dandruff / 2 in 1	N to O / N to D	Herbal green citrus floral woody
PANTENE (P & G)	2 in 1	D / N / O / Permed hair	Floral fruity green musky
JOHONSON'S BABY (J & J)	Normal		Fougère Lavender Geranium woody
	2 in 1		Floral green fruity citrus woody

Table X. Leading brands and market shares in Hong Kong

MANUFACTURER	BRAND	SHARE
KAO	SIFONE	16 %
	ESSENTIAL	7
	MERIT	5
	FEATHER	4
LEVER	TIMOTEI	3
PROCTER & GAMBLE	REJOICE	21
	HEAD & SHOULDERS	11
	VIDAL SASSON	2
WELLA		5
J & J	JOHONSON'S BABY	4
COLGATE	PALMOLIVE	1

namely, Kao's Feather and Sifone, Lever's Lux and Pailan, P&G's Pert Plus and J&J's Baby Shampoo. All of the manufacturers have two-in-one types on the market. Their fragrances are listed in Table IX with product claims.

Kao's Feather shampoo comes either in a soft and moist formula with a floral woody fragrance, or a cool and smooth

formula with an herbal minty fragrance. Kao's Sifone has normal and dry formulas both in two-in-one and two-in-one/anti-dandruff versions for a total of four different types. Their fragrance is fruity floral. Kao's Pure shampoo is sold only in Taiwan and has two versions—the fresh formula with a citrus fruity fragrance and the moisture formula with a floral fruity fragrance.

Lever's Lux comes in fresh, moisturizing and two-in-one formulas. The two normal formulas have a floral green fragrance and the two-in-one formula has a citrus fruity fragrance. Pailan, only sold in Taiwan, has five different types distinguished by the additives. The two-in-one type has a citrus fruity fragrance. The other four formulas have floral aldehydic, floral green, floral aldehydic and citrus fruity fragrances, with a perfume-like nuance.

Although Timotei is sold all over the world, it's not selling as well as it was before. The mild formula has an herbal green fragrance and the herbal honey formula has a citrus fruity fragrance.

P&G's Pert Plus is the name given only in Taiwan; in other Southeast Asian countries it is known as Rejoice. They all have floral green fragrances. The anti-dandruff formula also has a floral green fragrance.

Head & Shoulders has two formulas—the two-in-one type in the blue container and the regular type in the white container, both with an herbal green fragrance. Pantene is sold in Taiwan, France and the USA. They are all floral fruity fragrances.

J&J's two-in-one formula in the red container, has a floral green fragrance, and the yellow one has a Fougere lavender fragrance. They have the same fragrance all over Southeast Asia.

Hong Kong: Table X shows the leading brands in Hong Kong. In Hong Kong, as well as in Singapore, the two-in-one formula is doing very well. Some of the popular brands are Sifone, Rejoice and Head & Shoulders. Their fragrances are listed in Table XI with product claims.

Kao's Sifone brand has a fruity floral fragrance and the same fragrance all over Southeast Asia. The Essential brand has a conditioning formula and a natural styling formula. The former has a floral green fragrance and the latter a floral

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fruity fragrance. The fragrances of the two Feather shampoos are the same as in Taiwan. Merit has a Fougere lavender fragrance.

Lever's Timotei brand has three formulas—natural herb with an herbal green fragrance, spring herb with an herbal green fragrance and herb honey with a citrus fruity fragrance.

P&G's Rejoice has a fragrance of floral green and is the same as in other countries. Head & Shoulders also has the same fragrance as in other countries. The fragrance of Vidal Sasson is fruity cherry and the same as all over the world. J&J's baby shampoo has the same fragrance as in Taiwan. Colgate's Palmolive has a floral fruity fragrance. This brand is popular in the Philippines, but not seen in any other country.

Singapore: Table XII shows the leading brands in Singapore. Singapore also has a very similar situation as in Hong Kong, meaning that the two-in-one type is doing very well. In Hong Kong, two of the most popular brands are Sifone and Rejoice. Their fragrances, with product claims, are listed in Table XIII. Kao, Lever and P&G sell similar products in Hong Kong.

Malaysia: Table XIV lists the leading brands in Singapore. New & Trendy made by Malaysia's Unza has been doing very well, but people are also beginning to accept Rejoice and Sifone. Their fragrances, with product claims, are listed in Table XV.

Unza's New & Trendy has four formulas with different fragrances—the normal formula has an herbal green fragrance, the medicated formula has a floral green fragrance, the two-in-one type has a citrus green fragrance, and the two-in-one/anti-dandruff type has a floral fruity fragrance.

Kao's main brand is Merit with the fragrance of Fougere lavender. Sifone has been accepted. Its fragrance is the same as in other countries. The Essential and Feather brands are the same as in Hong Kong and Singapore.

Lever's Timotei brand is doing well and the same as in Hong Kong.

P&G's Rejoice is accepted very well. The fragrance is floral green and is the same as in other countries. Head & Shoulders is also estimated to be the same as in other countries.

Table XI. Product claims and fragrances of leading brands in Hong Kong

BRAND	CONCEPT	VARIANT	FRAGRANCE
SIFONE (KAO)	2 in 1	N/D	Fruity floral green citrus
	2 in 1 / Anti dandruff	N/D	Fruity floral green citrus
ESSENTIAL (KAO)	Normal	Conditioning	Floral fruity green aldehydic
		Natural styling	Floral green citrus fruity
FEATHER (KAO)	Normal	Soft & clean	Floral woody balsamic amber
		Fresh & clean	Herbal minty floral citrus fruity
MERIT (KAO)	Anti dandruff		Fougère floral citrus woody
TIMOTEI (LEVER)	Normal	Natural herb	Herbal green floral woody
		Spring herb	Herbal green floral woody
		Herb honey	Citrus fruity green floral balsamic
REJOICE (P & G)	2 in 1	N/D/O / Fine hair	Floral green musky woody Hyacinth
	2 in 1 / Anti dandruff	N to D/ N to O	Floral green musky woody Hyacinth
HEAD & SHOULDERS (P & G)	Anti dandruff	N to O / N to D	Herbal green floral citrus woody
	Anti dandruff / 2 in 1	N to O / N to D	Herbal green citrus floral woody
VIDAL SASSON (P & G)	Normal		Fruity green Cherry
JOHNSON'S BABY (J & J)	Normal		Fougère Lavender Geranium woody
Palmolive (CP)	Normal	Normal to oily	Floral fruity green musky
		Normal to dry	Floral fruity green musky

Table XII. Leading brands and market shares in Singapore

MANUFACTURER	BRAND	SHARE
KAO	SIFONE	16 %
	MERIT	8
	FEATHER	5
	ESSENTIAL	3
LEVER	TIMOTEI	5
PROCTER & GAMBLE	REJOICE	22
	HEAD & SHOULDERS	4
LION		5
GINVERA		6

J&J's two formulas are sold on the market as in Taiwan. The two-in-one claim is listed on the label of the container. Fragrances are the same as in other countries.

Clairol has a high market share, especially in Malaysia. Herbal Essence, the famous brand in European countries and the USA, is found here also. The normal type has a herbal green fragrance and the antidandruff type has a Fougere citrus fragrance.

Thailand: Table XVI shows the leading brands in Thailand. In Thailand, Lever's products are doing extremely well. A new brand, Sunsilk styling, was recently launched as

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Table XIII. Product claims and fragrances of leading brands in Singapore

BRAND	CONCEPT	VARIANT	FRAGRANCE
SIFONE (KAO)	2 in 1	N / D	Fruity floral green citrus
	2 in 1 / Anti dandruff	N / D	Fruity floral green citrus
MERIT (KAO)	Anti dandruff		Fougère floral citrus woody
FEATHER (KAO)	Normal	Soft & clean	Floral woody balsamic amber
		Fresh & clean	Herbal minty floral citrus fruity
ESSENTIAL (KAO)	Normal	Conditioning	Floral fruity green aldehydic
		Natural styling	Floral green citrus fruity
TIMOTEI (LEVER)	Normal	Natural herb	Herbal green floral woody
REJOICE (P & G)	2 in 1	N / D / O / Fine hair	Floral green musky woody Hyacinth
HEAD & SHOULDERS (P & G)	Anti dandruff	N to O / N to D	Herbal green floral citrus woody
	2 in 1 / Anti dandruff	N to O	Herbal green floral citrus woody

Table XV. Product claims and fragrances of leading brands in Malaysia

BRAND	CONCEPT	VARIANT	FRAGRANCE
MERIT (KAO)	Anti dandruff		Fougère floral citrus woody
SIFONE (KAO)	2 in 1	N / D	Fruity floral green citrus
	2 in 1 / Anti dandruff	N / D	Fruity floral green citrus
ESSENTIAL (KAO)	Normal	Conditioning	Floral fruity green aldehydic
		Natural styling	Floral green citrus fruity
FEATHER (KAO)	Normal	Soft & clean	Floral woody balsamic amber
		Fresh & clean	Herbal minty floral citrus fruity
TIMOTEI (LEVER)	Normal	Natural herb	Herbal green floral woody
		Spring herb	Herbal green floral woody
		Herb honey	Citrus fruity green floral balsamic
REJOICE (P & G)	2 in 1	N / D / O / Fine hair	Floral green musky woody Hyacinth
HEAD & SHOULDERS (P & G)	Anti dandruff	N to O / N to D	Herbal green floral citrus woody
JOHNSON'S BABY (J & J)	Normal		Fougère Lavender Geranium woody
	2 in 1	Conditioning	Floral green fruity citrus woody
CLAIROL (CLAIROL)	Normal	N / O / D	Herbal green floral woody musky
	Anti dandruff	Regular	Fougère Citrus floral green woody
NEW & TRENDY (UNZA)	Normal	Aloe vera & Jojoba	Herbal green Lavender citrus woody
	Medicated		Floral fruity green woody
	2 in 1		Citrus green foral woody
	2 in 1 / Anti dandruff		Floral fruity citrus green

a new two-in-one formula and seems to be selling very well. The leading brand, Dimension, recently launched a men's version. On the other hand, Rejoice is doing extremely well for Lever and now claims the top share in the two-in-one category. Their fragrances, with product claims, are listed in Table XVII.

Kao's Feather has three formulas, the normal formula has a floral fruity fragrance, the dry formula has a Fougère

floral fragrance, and the split-end formula has a floral balsam fragrance.

P&G's Rejoice has been growing in popularity.

Lever's Sunsilk has three formulas—egg protein with an oriental floral fragrance, olive oil with a floral balsam fragrance, and vitamin formula with a floral green fragrance. The newly launched Sunsilk styling also has three formulas—floral fruity in the pink container, chypre herbal in the yellow container and floral aldehydic in the purple container. Dimension contains sunscreen and has three formulas—permed/dry hair formula for daily use is in the green container with the same floral fruity fragrance. The brown container is the men's formula and has a Fougère lavender fragrance. Clinic claims anti-dandruff and has two types, the one in the white container is Fougère herbal and in the transparent container is herbal green.

Indonesia: Table XVIII shows the leading brands in Indonesia. Lever's monopoly is much more in Indonesia as compared to Thailand. Sunsilk is doing extremely well. Another specific point is the black shampoo such as "Urang Aring" (a type of dye extracted from leaves). Their fragrances, with product claims, are listed in Table XIX.

Kao's main brand is Feather, and it has three formulas—herbal with an herbal green fragrance, protein with a floral green fragrance and

"Urang Aring" with a floral balsam fragrance. The fragrance of the three by Sifone is fruity floral and the same as in other countries.

In Indonesia, P&G's Rejoice is well-accepted and has a large share of the market.

Lever's Sunsilk is a very strong brand with four variants—"Seledri" (celery) is fruity floral, Egg is floral green, "Urang Aring" is floral balsamic and "Lidah Buya" (a type

Table XIV. Leading brands and market shares in Malaysia

MANUFACTURER	BRAND	SHARE
KAO	MERIT	6 %
	SIFONE	5
	ESSENTIAL	3
	FEATHER	2
LEVER	TIMOTEI	5
PROCTER & GAMBLE	REJOICE	9
	HEAD & SHOULDERS	2
J & J	JOHNSON'S BABY	6
CLAIROL	CLAIROL	6
UNZA	NEW & TRENDY	17

Table XVI. Leading brands and market shares in Thailand

MANUFACTURER	BRAND	SHARE
KAO	FEATHER	9 %
	ESSENTIAL	5
	SIFONE	3
LEVER	SUNSILK	21
	CLINIC	10
	DIMENSION	6
	SUNSILK STYLING	6
	TIMOTEI	2
PROCTER & GAMBLE	REJOICE	13
LION		5
CLAIROL	CLAIROL	4
REVLON		2
J & J	JOHNSON'S BABY	1
WELLA		1

Table XVII. Product claims and fragrances of leading brands in Thailand

BRAND	CONCEPT	VARIANT	FRAGRANCE
FEATHER (KAO)	Normal	Split-end hair	Floral balsam woody
		Dry hair	Fougère floral woody
		Normal hair	Floral fruity green woody musky
SIFONE (KAO)	2 in 1 2 in 1 / Anti dandruff	Normal	Fruity floral green citrus
		Damage	Floral green fruity woody
		Normal	Fruity floral green citrus
		Damage	Floral green fruity woody
ESSENTIAL (KAO)	Normal	Dry split-end	Floral woody balsamic
		Mild herbal	Floral green citrus
SUNSILK (LEVER)	Normal	Egg protein	Oriental floral green woody
		Olive oil	Floral balsamic woody
		Vitamin	Floral green fruity woody
SUNSILK STYLING (LEVER)	Normal	Pink	Floral fruity green
		Yellow	Chypre herbal Lavender
		Blue	Floral aldehydic balsam woody
CLINIC (LEVER)	Anti dandruff	Extra	Fougère herbal balsam woody
			Herbal green Lavender woody
DIMENSION (LEVER)	2 in 1 / Sun screen	D or P/Freq. wash	Floral fruity green woody
		For men	Fougère Lavender hebal woody
TIMOTEI (LEVER)	Normal	Mild	Herbal green floral woody
		Herb honey	Citrus fruity green floral balsamic
REJOICE (P & G)	2 in 1 2 in 1 / Anti dandruff	4 Variants	Floral green musky woody Hyacinth
		2 Variants	Floral green musky woody Hyacinth

of plant extract from the lily family) is floral fruity. The clear formula has an herbal green fragrance. Dimension is a two-in-one type shampoo and has two variants, normal with chypre floral and oily with a floral fruity fragrance.

Lion's Emeron shampoo, which was a popular brand in Japan at one time, has "Lidah Buya" with an herbal green fragrance and "Urang Aring" with a floral balsam fragrance.

Wella has three brands: Neopon, Dancin and Wella Balsam. The Neopon brand has four formulas according to the hair type with different fragrances. The dull-hair formula is herbal citrus, the damaged hair formula is Fougere lavender, the normal formula is herbal pine and the dry formula is herbal and floral fragrance. Dancin has three variants: normal, dry and damaged with the same floral green fragrance. Wella Balsam has a normal formula with an herbal woody fragrance, and the anti-dandruff formula has an herbal green fragrance.

Revlon has two brands—Flex has four formulas with an

oriental balsam fragrance, well-known all over the world, and ZP 11 is an anti-dandruff shampoo with a floral woody fragrance.

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Table XVIII. Leading brands and market shares in Indonesia

MANUFACTURER	BRAND	SHARE
KAO	FEATHER	6 %
	SIFONE	2
LEVER	SUNSILK	50
	CLEAR	9
	DIMENSION	8
PROCTER & GAMBLE	REJOICE	5
LION		4
WELLA		1
REVLON		1

Table XX. Leading brands and market shares in Philippines

MANUFACTURER	BRAND	SHARE
KAO	FEATHER	4 %
	ESSENTIAL	1
	SIFONE	1
LEVER	SUNSILK	29
PROCTER & GAMBLE	REJOICE	14
COLGATE	PALMOLIVE	29
WELLA		5
J & J	JOHNSON'S BABY	4

Table XIX. Product claims and fragrances of leading brands in Indonesia

BRAND	CONCEPT	VARIANT	FRAGRANCE
FEATHER (KAO)	Normal	Herbal	Herbal green floral fruity
		Protein	Floral green fruity woody musky
		Urang aring	Floral balsam fruity green
SIFONE (KAO)	2 in 1	N / D	Fruity floral green citrus
	2 in 1 / Anti dandruff		Fruity floral green citrus
SUNSILK (LEVER)	Normal	Seledri	Fruity floral citrus green
		Egg	Floral green spicy woody
		Urang aring	Floral balsam woody
		Lidah buya	Floral fruity green woody
CLEAR (LEVER)			Herbal green floral citrus woody
DIMENSION (LEVER)	2 in 1	Normal	Chypre Floral green fruity
		Oily	Floral fruity green woody
REJOICE (P & G)	2 in 1	4 Variants	Floral green musky woody Hyacinth
EMERON (LION)	Normal	Lidah buya	Herbal green floral citrus woody
		Urang aring	Floral balsam woody spicy
NEOPON (WELLA)	Normal	Dull hair	Herbal citrus woody
		Damaged	Fougère Lavender woody
		Normal	Herbal green Pine woody
		Dry	Herbal green floral citrus woody
DANCIN (WELLA)	Normal	N/D/Damaged	Floral green spicy woody
WELLA BALSAM (WELLA)	Normal	Mild & clear	Herbal woody balsam
	Anti dandruff		Herbal green camphorous woody
FLEX (REVLON)	Normal	4 Variants	Oriental balsam woody
ZP 11 (REVLON)	Anti dandruff		Floral woody balsam

Philippines: Table XX shows the leading brands in the Philippines. In the Philippines, Lever and Colgate are the major competitors, and recently P&G joined the battlefield, so the competition is even higher. Their fragrances, with product claims, are listed in Table XXI.

share of the market. "Scalp care" is herbal aromatic, "moisturizing" is floral fruity, "extra gentle" is floral balsamic, "extra body" is floral green, and "extra shine" has a floral fruity fragrance. All of them are also perfumed, with rich fragrances.

Although Kao introduced three brands: Feather, Essential and Sifone, they do not seem to be successful in this market. The Feather is the most popular of the three. Feather has three formulas—Milk protein with a floral fruity fragrance, Mint herb with an oriental herbal fragrance and silk protein with an oriental floral fragrance. The fragrances of Essential and Sifone are the same as in other countries.

P&G's Sunsilk has five variants: the normal or frequent wash is floral balsam, Shiny black is herbal green, Delicate is floral aldehydic, Body and Bounce is floral green, and dry is floral aldehydic. All of these are perfumed with rich fragrances.

Lever's Rejoice is accepted in this market as well as in other countries.

Colgate is doing very well in this market. Two years ago, Palmolive had a major modification of all its products and has been getting a very large

The Shampoo Market in Southeast Asia

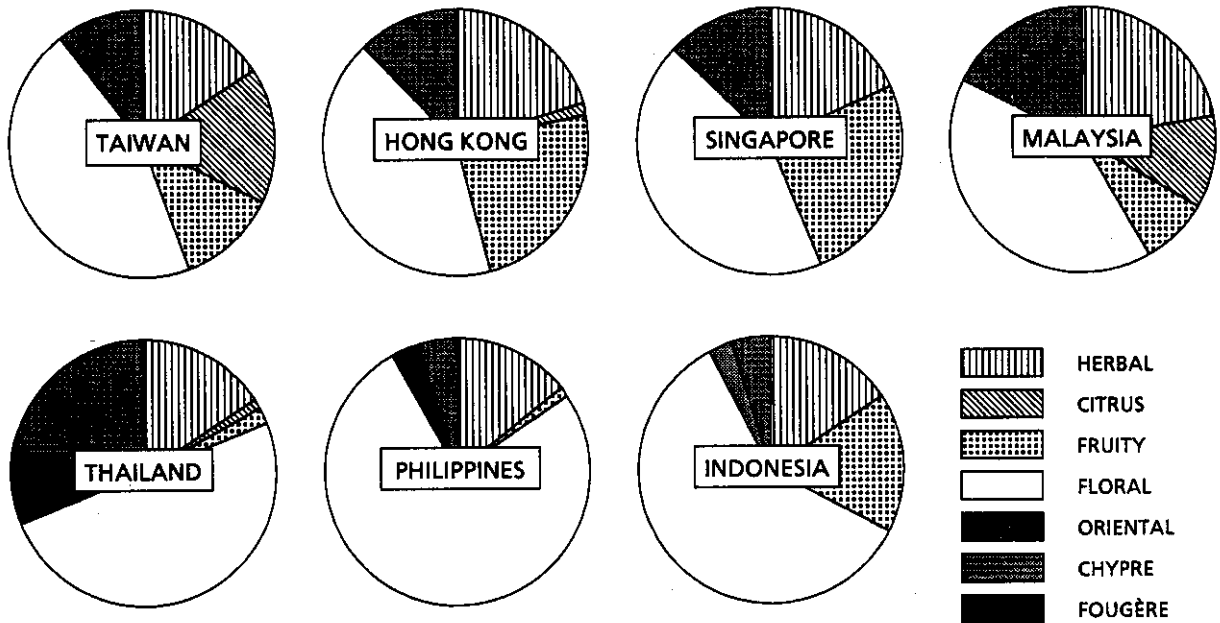


Figure 3. Fragrance sector of shampoo in Southeast Asia.

Table XXI. Product claims and fragrances of leading brands in Philippines

Fragrance of Shampoo in Southeast Asia

Table XXII shows shampoo fragrances found in each country. The brands such as Sunsilk, Palmolive, New & Trendy and Pailan have well-known fragrance formulas which are closely related to the taste of each country. On the other hand, international brands such as Rejoice, Timotei, Sifone and Johnson's baby shampoo have the same fragrance. There are two main fragrances. One has a fresh, light and rather toiletry image with the complex of a citrus, floral and fruity note, which is typical in Taiwan, Hong Kong, Singapore and Malaysia. Another has a perfumery and cosmetic image with the character of high tenacity such as oriental and chypre, which is common in Thailand, Indonesia and the Philippines. Figure 3 shows the percentage of each fragrance type of the popular brands in each country. The high percentage of citrus fragrance in Taiwan is due to the fragrance of Pailan. In Southeast Asia, it is a unique phenomenon like New & Trendy in Malaysia. A high percentage of fruity fragrance in Hong Kong and Singapore is due to the fragrance of

BRAND	CONCEPT	VARIANT	FRAGRANCE
FEATHER (KAO)	Normal	Milk protein	Floral fruity green woody musky
		Mint herb	Oriental herbal balsam woody
		Silk protein	Oriental floral woody balsam
ESSENTIAL (KAO)	Normal	Normal	Floral fruity green woody
		Damaged	Floral green fruity balsam woody
SIFONE (KAO)	2 in 1	N / D	Fruity floral green citrus
SUNSILK (LEVER)	Normal	Nor or freq. wash	Floral balsam green woody
		Shiny black	Herbal green floral balsam
		Delicate	Floral aldehydic woody balsam
		Body & bounce	Floral green fruity woody
		Dry	Floral aldehydic woody balsam
REJOICE (P & G)	2 in 1	N / D / O / Fine	Floral green musky woody Hyacinth
PALMOLIVE (CP)	Normal	Scalp care	Herbal aromatic green floral
		Moisturizing	Floral fruity green woody musky
		Extra gentle	Floral balsamic fruity woody
		Extra body	Floral green fruity woody
		Extra shine	Floral fruity green Tuberise Jasmin

Sifone. In Southeast Asian countries, it is expected that the international brands will be doing extremely well, so an oriental and chypre fragrance may be reduced.

Perception of Fragrance

Finally, we would like to introduce the results of our fundamental research conducted in Thailand, the Philippines and Japan. The aim of this study was to determine the

Table XXII. Fragrances of shampoo in Southeast Asia

	HERBAL /MINTY	CITRUS	FRUITY	FLORAL				ORIENTAL	CHYPRE	FOUGÈRE
				Fruity	Green	Aldehydic	Balsamic			
TAIWAN	Feather(C) Timotei(M) H & S	Pure(F) Lux(2 in 1) Timotei(HH) Pailan (Lan) Pailan (2 in 1)	Sifone	Pure(M) Pantene	Lux Pailan(Aloe) Pert plus	Pailan(Lec) Pailan(Silk)	Feather(S)			Johnson's baby
HONG KONG	Feather(FC) Timotei(NH) Timotei(SH) H & S	Timotei(HH)	Sifone Vidal sason	Essential(Con) Palmolive	Essential(Nat) Rejoice		Feather(SC)			Merit Johnson's baby
SINGAPORE	Feather(C) Timotei(NH) H & S		Sifone	Essential(Con)	Essential(Nat) Rejoice		Feather(S)			Merit
MALAYSIA	Feather(F) Timotei(NH) Timotei(SH) H & S N&T(AV) Clairol	Timotei(HH) N&T(2 in 1)	Sifone	Essential(Con) N&T(M) N&T(2in1/M)	Essential(Nat) Rejoice Johnson(2in1)		Feather(S)			Merit Johnson's baby Clairol
THAILAND	Clinic Timotei(NH)	Timotei(HH)	Sifone(N)	Feather(Hon) Sunsilk styl(P) Dimension(D/F)	Sunsilk(Vit) Rejoice Essential(M) Sifone(D)	Sunsilk styl(B)	Sunsilk(Oil) Feather(Mil) Essential(Spr)	Sunsilk(Egg) Dimension(N)	Sunsilk styl(Y)	Merit Feather(Sil) Dimension(D) Clinic(Extra)
INDONESIA	Feather(Herb) Clear Emeron(Lida) Neopon(Dul) Neopon(Nor) Neopon(Dry) Weile balsam		Sifone Sunsilk(Seldri)	Sunsilk(Lidah) Dimension(O)	Feather(Prot) Sunsilk(Egg) Rejoice Dancin		Feather(Ura) Emeron(Ura) Sunsilk(Ura) ZP 11	Flex	Dimension(N)	Neopon(Dam)
PHILIPPINES	Palmolive(SC) Sunsilk(Black)		Sifone	Palmolive(ES) Essential(D) Feather(Milk)	Sunsilk(Body) Palmolive(ES) Palmolive(EB) Rejoice Essential(N)	Sunsilk(Delic) Sunsilk(Dry)	Sunsilk(Nor) Palmolive(EG)	Feather(Silk) Feather(Mint)		Johnson's baby

differences among people of different countries. Fifty females took part in the test in each country. Each panelist sniffed blotters which had single fragrance such as lavender, peppermint, etc. on them. Figure 4 shows how ten fragrances were perceived classified by one of four images: favorite, cool, natural and familiar. We thought there would be some difference in perception of these fragrances. We found that apple fragrance is a favorite in all three countries. However, peach fragrance is less popular in Thailand. Japanese people do not like lavender fragrances. As "cool" feeling, jasmine and apple were evaluated about the same in all countries but lavender, rose and apple were evaluated differently. As "familiarity" feeling, the results are pretty much the same as the ones of the fragrance preferences.

These evaluation differences are, of course, expected due to the differences of culture, weather and customs. It would be very interesting to see whether they are changeable by time or not. In any case, these results can be useful in creating new fragrances.

Summary

Bathing and shampooing habits: Southeast Asian people take showers twice a day, in the morning and in the evening. They wash their hair twice or three times a week and the frequency of shampoo is increasing.

Market situation: The shampoo market is expected to expand continuously due to economic growth. Major manufacturers will introduce the same brands all over the world. The two-in-one formula shampoo will do well. The unification and combination of functions will continue. We do not foresee the growth of the conditioner market, in spite of the growing consciousness for hair care. The success of the two-in-one shampoo may be influenced by this market growth. The launching date will be simultaneous all over the world.

Shampoo fragrance: The uniformity of fragrance will proceed, then the fragrance map will be similar in this area.

Reference

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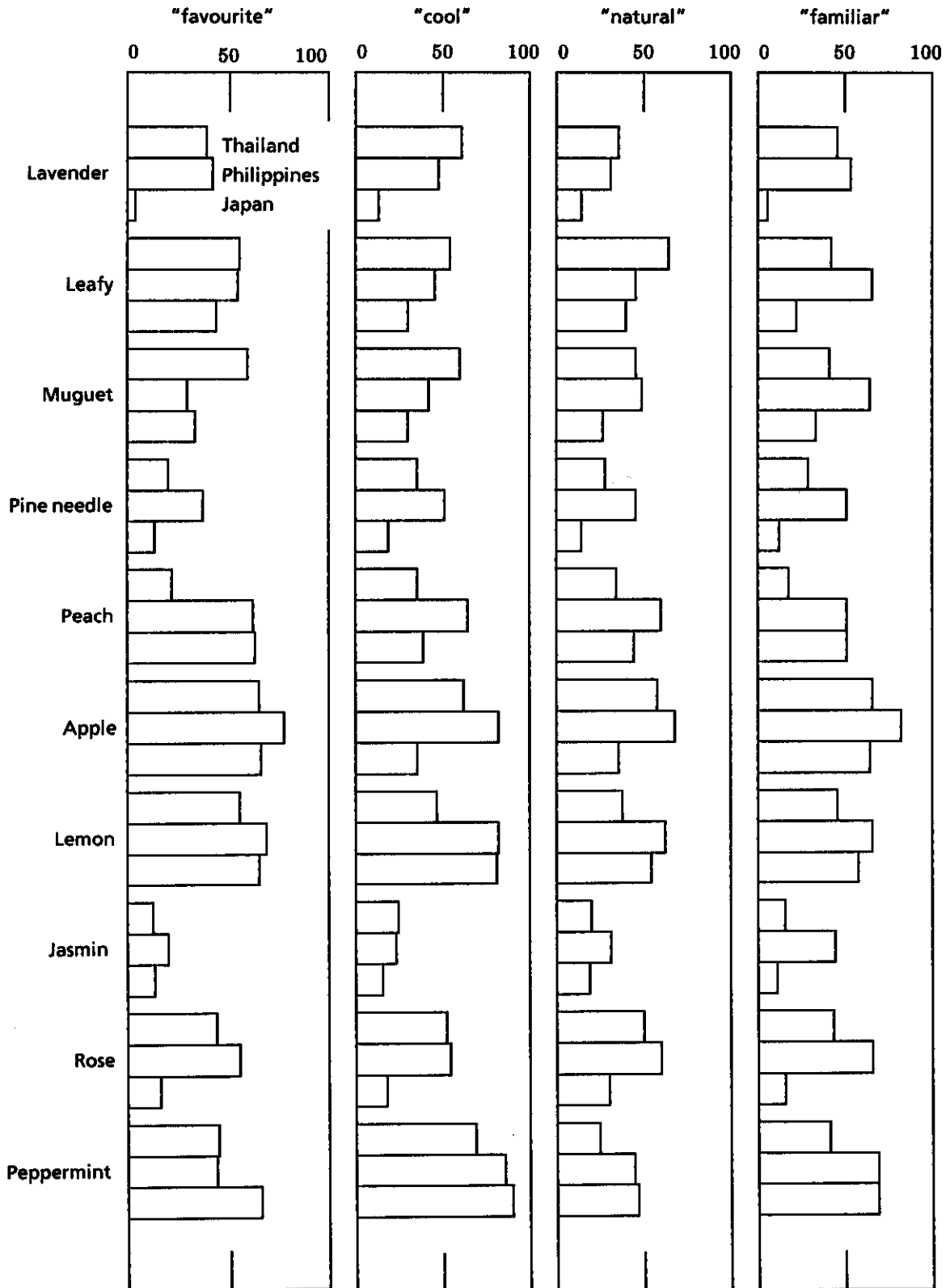


Figure 4. Perception of fragrances. Top column: Thailand; Middle column: Philippines; Lower column: Japan.