hpci INDIA

INDIAN BEAUTY TESTING TRENDS

WEBINAR

February 27th, 2025

ASIA COSME•LAB

miravex

EOTECH

cliantha research

skinobs

CONTENT

Testing exhibitor's panorama

Indian Beauty Context

Key Testing Trends

- #1 Brightening and skin lightening
- #2 Anti-ageing
- #3 Hair: frizz control & smoothing
- #4 Prone to acne skin

The Testing methods

SPEAKERS FOR THIS WEBINAR

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CEO - Skinobs

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CEO – Miravex Limited

Edouard Macé
CEO – Eotech

Simran Sethi
Cliantha Research

CONTEXT OF THE INDIAN BEAUTY MARKET

Key points of the market 🚀

Science Technology

Digital Experience
E-commerce
Celebrity
Influencer-led marketing

Testing Technology
In-situ testing
Tolerance: HRIPT

TOP 4 CLAIMS
1. Pigmentation/Glow
2. Hyperpigmentation
3. Acne
4. Pollution

Life-style Changes
Clean Beauty
Regionalization
Rural/Urban

Formulation Evolution
Skincare and makeup
Light formula

Skin Physiology Focus
Skin specificity
Humidity resistant products; sweat proof, long lasting, waterproof
Long term health and wellness

Cultural

Environmental

Beauty Cultural
Cosmetics/Ayurvedic beauty
Traditional practices : ayurveda-Yoga
Bollywood culture

Regulations Constraints
Indian **regulatory-BIS standards**
Low control

Environmental Changes
Heat
Humidity
Pollution

Regulations

ASIAN BEAUTY CONTEXT

in-cosmetics Asia 2024

Digital Experience
E-commerce
Digital marketing
Virtual try-on
TikTok
Personalized solutions and connected

Science Technology

Testing Technology
In-situ testing
R&D

Life-style Changes
Self-care, beauty routine and health
Gender , Gen A
Longevity – Lifespan
Pressure on the consumer to look good

Formulation Evolution
Luxurious ingredients
Bioengineering
Sustainability

Skin Physiology Focus
Skin specificity
Humidity resistant products; sweat proof, long lasting, waterproof
Sensitive skin
Inflammation

Cultural

Environmental

Beauty Cultural
Fusion of tradition and modern science
Ayurveda | Halal
K-Beauty, J-Beauty
Non-invasive surgery
Dermocosmetics and medical devices

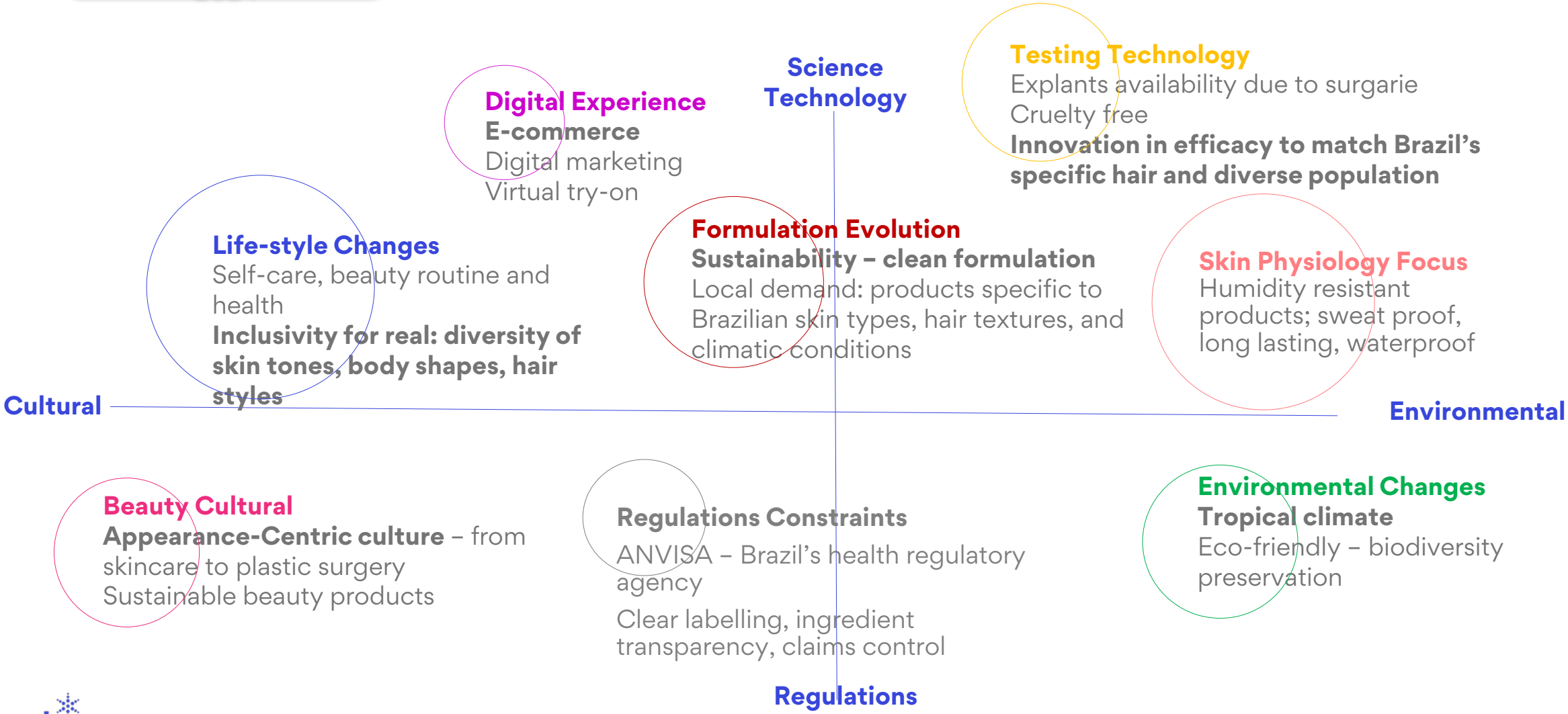
Regulations Constraints
China – animal testing still mandatory
Local regulatory support – MHLW for Japan, MFDS for South Korea and NMPA for China

Environmental Changes
Eco-friendly – sustainable
Heat – humidity
Pollution - SUN
Climate adaptative

Regulations

BRAZILIAN BEAUTY CONTEXT

in-cosmetics Latina 2024



KOREAN BEAUTY CONTEXT

in-cosmetics Korea 2024

Digital Experience
Social Media
A.I.
E-commerce

Science
Technology

Testing technology
A.I
R&D

Life-style Changes
Well-being
Pop culture phenomenon
Longevity - Lifespan
Breaking gender norms – Inclusive marketing

Formulation Evolution
Luxurious ingredients
Microencapsulation | nanotechnology | bioengineering
Sustainability

Skin Physiology Focus
Exposome
Pollution
Sun damage

Cultural

Environmental

Environmental Changes
Heat
Humidity

Beauty Cultural
Fusion of modern science & time-tested Korean skincare traditions
NeuroGlow - Holistic wellness
Data-backed

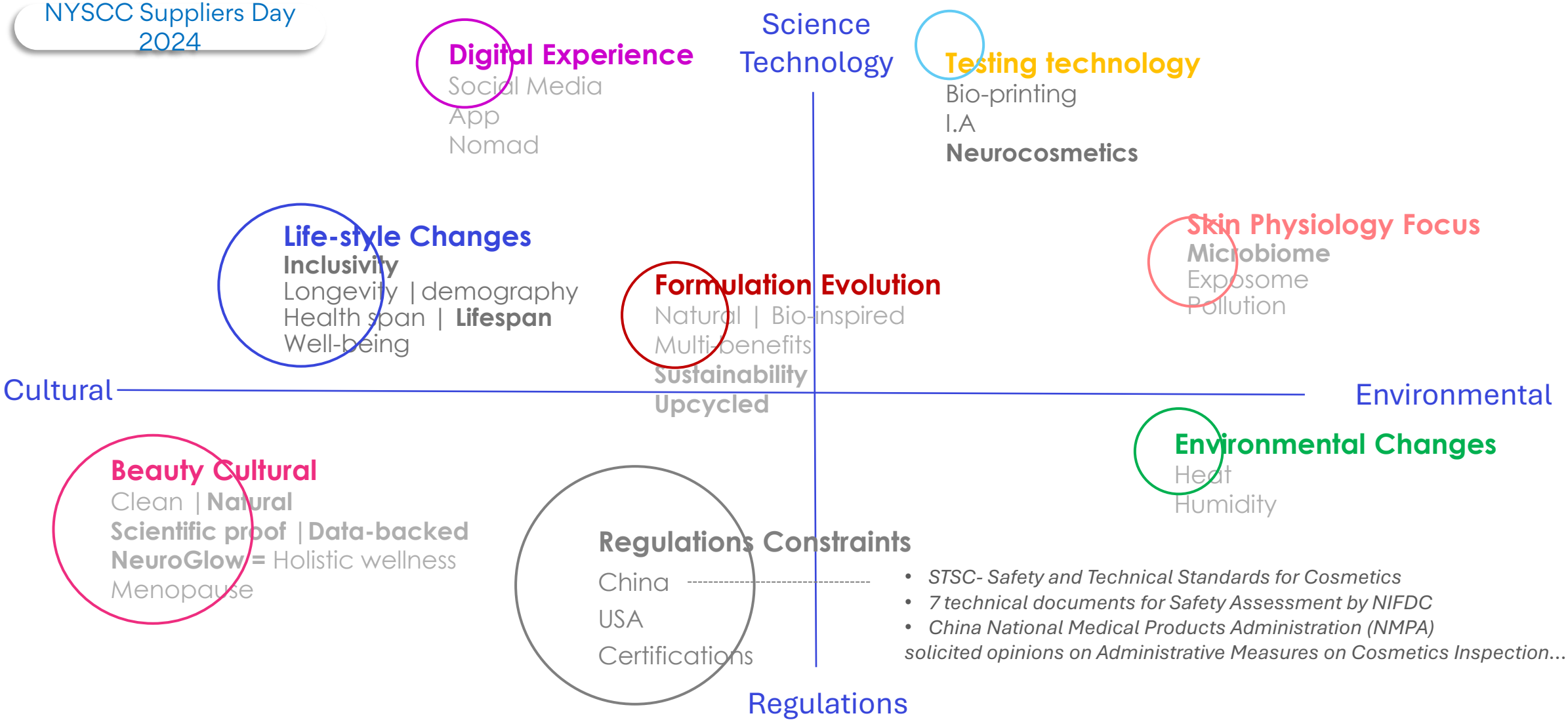
Regulations Constraints
Functional cosmetics: functions such as aiding the skin whitening, hair-dye …

Regulations

skinobs

USA BEAUTY CONTEXT

NYSCC Suppliers Day 2024

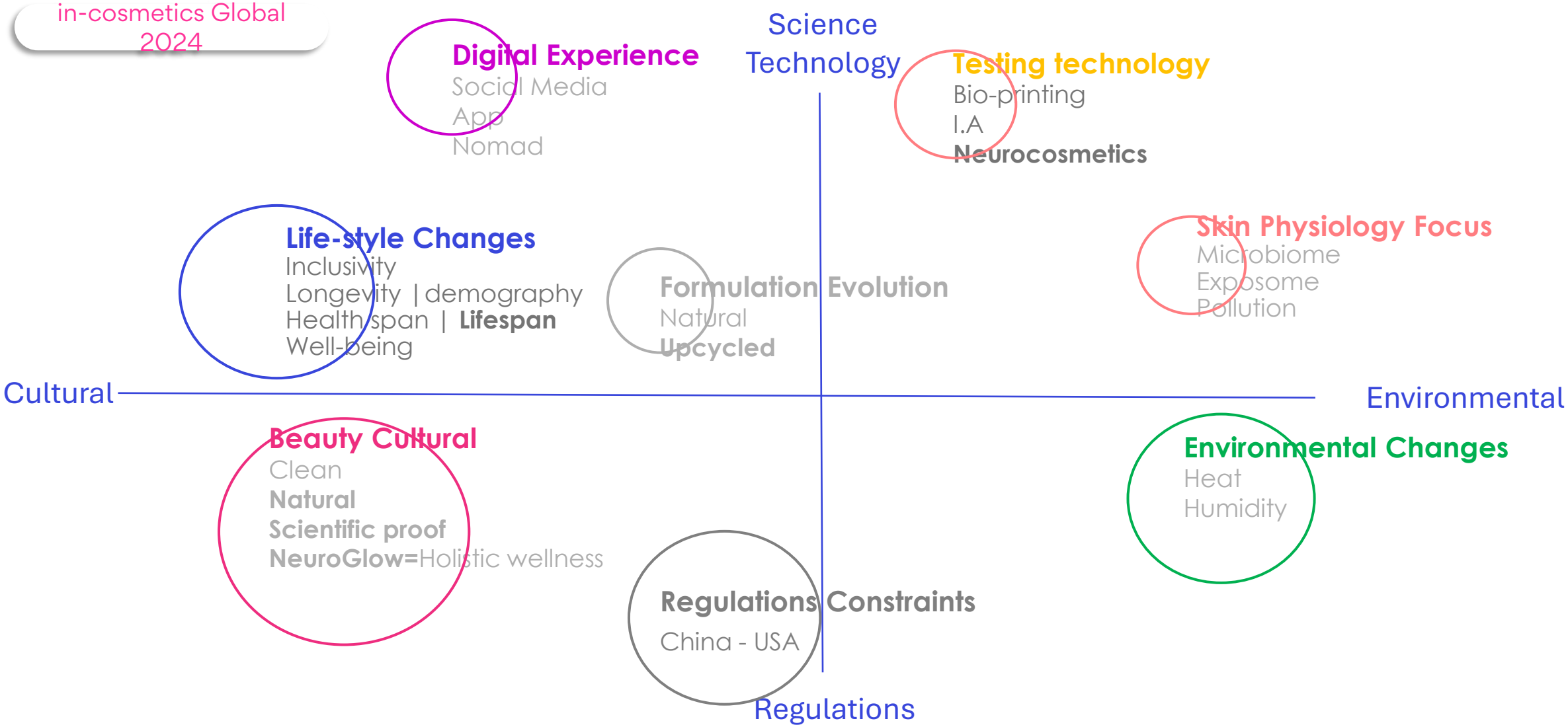


- *STSC- Safety and Technical Standards for Cosmetics*
- *7 technical documents for Safety Assessment by NIFDC*
- *China National Medical Products Administration (NMPA)*

solicited opinions on Administrative Measures on Cosmetics Inspection…

EUROPEAN BEAUTY CONTEXT

in-cosmetics Global 2024



INDIAN BEAUTY MARKET

Key points of the market 🚀

	STRENGHS	WEAKNESSES
Beauty market	**$34 billion by 2028** Awareness E-commerce Organic, Ayurvedic, and clean beauty Celebrity	Fragmented market **Low brand loyalty** Skepticism
Political	**Government support** local beauty brands. Regulations following BIS and EU	Unclear policies on **animal testing** Bureaucratic challenges
Economical	**Growing middle class** **premium & luxury** beauty **E-commerce**	**Inflation & rising raw material costs** Currency fluctuations
Technological	Rise of **AI & AR** **Personalized skincare**	High costs of **R&D** Dependence on **imported technology**
Cultural Social Environmental	**Ayurveda & herbal beauty** traditions **Influencer** **Gender inclusivity-**growth	**Fairness bias** **Preference for foreign brands** over local ones Social stigma around **men's beauty & skincare**

Top 10 brands in India

- Typsy Beauty
- Lakme
- Maybelline
- MAC Cosmetics
- Nykaa Cosmetics
- Colorbar
- Sugar Cosmetics
- L'Oreal Paris
- Kiko Milano

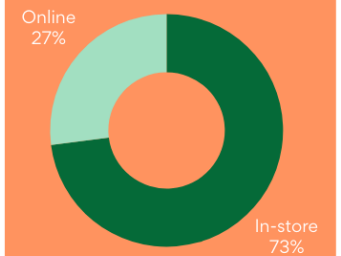
THE INDIAN BEAUTY MARKET

INDIAN BEAUTY MARKET

All you need to know

$ 5.92 billion Value of the beauty market in 2024

Top Source for Shopping



Indian Beauty and Personal Care Products Market Leaders

L'ORÉAL

Natura &co

ESTÉE LAUDER

Top 3 claims in the Indian Beauty Market

$ 2.8 billion

skincare products

$ 2.4 billion

hair care products

$ 1.9 billion

make-up products

Anti-Ageing

Vegan

Moisturizing

Online Shopping

Natural ingredients

Conscious Consumption

Affordable

Niche Cosmetics

THE INDIAN BEAUTY MARKET

Indian Culture

Key figures

Average salary
$ 206.66/ per month

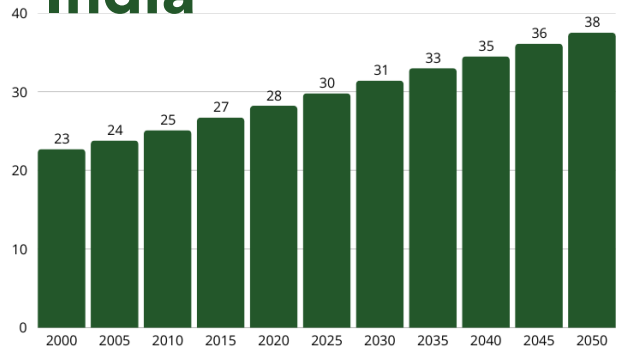
Beauty market value
$ 5.92 billions

Population « N°1 »
1, 4 286 billions

Urbanisation rate:
36% *(81% France)*

Literacy rate:
77.7%

Average age in India



Life expectancy
67,7 years in 2023
(82,5 years France)

INDIAN BEAUTY MARKET

A strong regionalisation 🌎

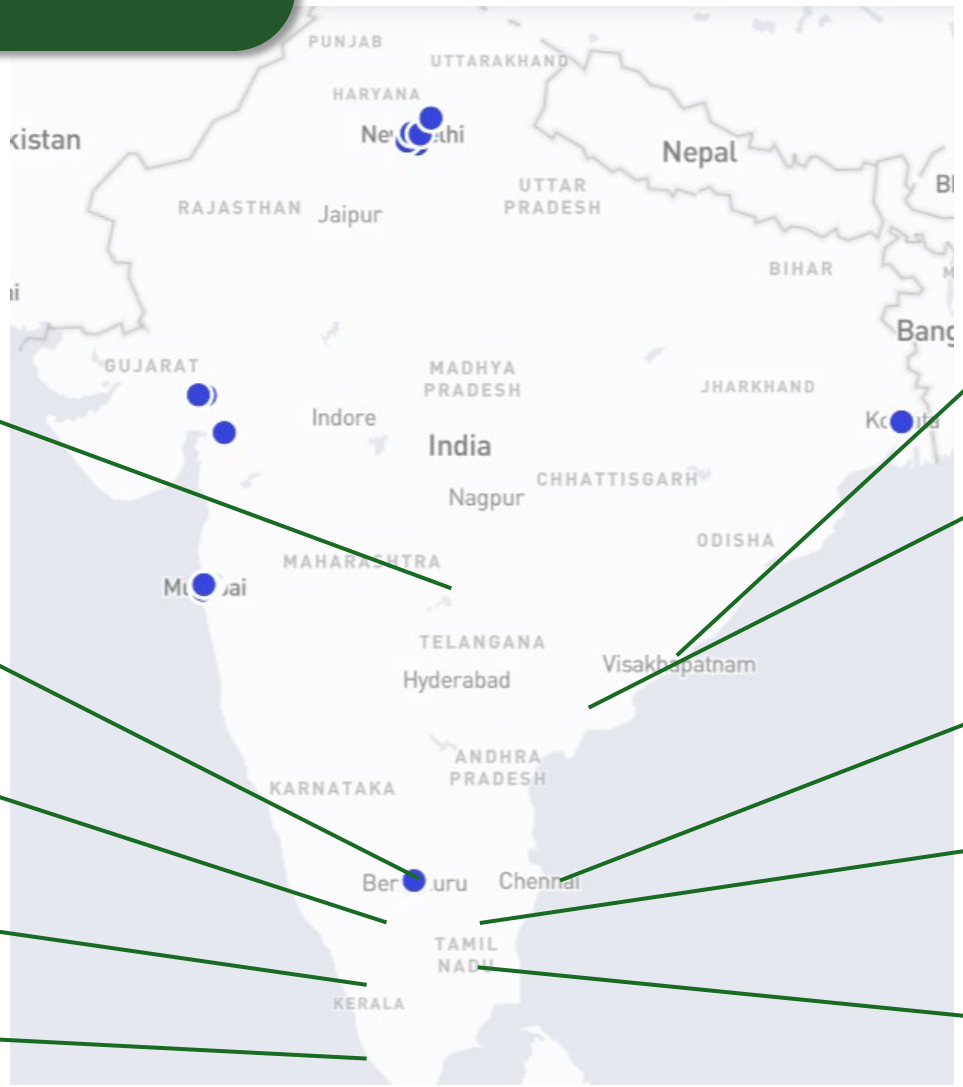
Hyderabad: Rapid expansion
+ 20% increase in beauty consumption

Mysuru: Expanding market with 9% growth.

Bengaluru: +15% annual growth in beauty demand.

Coimbatore: A rising market +12% growth in demand.

Kochi: An **emerging market** growing 10% in personal care



Visakhapatnam: A coastal city **+18% growth** in beauty sector.

Vijayawada: Booming **urban center** +14% rise in beauty

Chennai: 25% of South India's beauty market

Tiruchirappalli: An emerging hub +7% growth

Madurai: A balanced market + 8% growth in beauty.

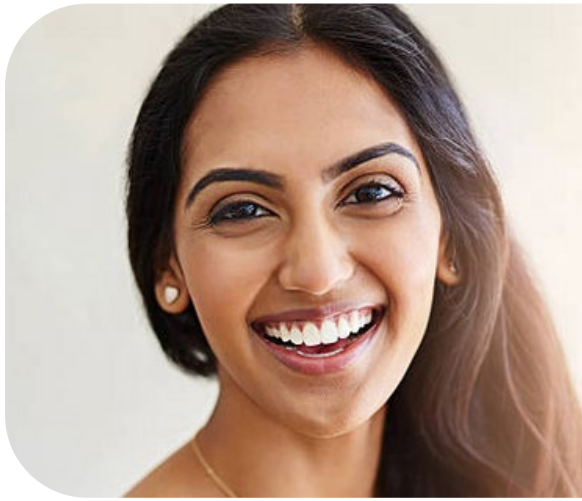
FOCUS ON THE METHODS

Brightening and skin lightening

Skin gloss analysis

- Goniolux - Orion technolab
- SambaFace - BossaNova
- Transluderm - Orion Technolab
- Antera3D - **Miravex**
- Glossymeter - C+K
- C-Cube - Pixience

- Glow
- Radiance
- Exfoliating
- Skin barrier
- Lightening
- Complexion highlighting



Sales of fairness/skin-lightening creams and soaps in India : annual market of 6.75 billion rupees (the US $150 million) 60% of skincare product sales.

FOCUS ON THE METHODS

Face overall analysis

Sales of **fairness/skin-lightening creams** and soaps in India :
annual market of **US $150 million**
60% of skincare product sales

Selection of instrumentation

Face overall analysis

- VisioFace - C+K
- ColorFace - Newtone Technologies
- EvaSurf/Dermatop HE/AEVA HE - **Eotech**
- Visia Complexion - Canfield
- HeadScan Dynamics – Orion
- F-Ray - beyoung

- Glow
- Radiance
- Anti-ageing
- Anti-sagging
- Anti-wrinkle
- Sensitivity
- Pigmentation

FOCUS ON METHODS

Skin surface analysis

Selection of instrumentation

BB cream effect
Limit inflammation
Reduce redness
Covering
Breathable

Skin Surface Analysis

- Siascope - MeadXHealth
- EvaSurf/Dermatop HE/AEVA HE - **Eotech**

- Nomad&Skin Cam - Newtone Technologies
- TIVI80 Spot Analyser - Wheelsbridge
- Antera3D - **Miravex**

- VisioScan - *C+K*
- C-Cube - *Pixience*

FOCUS ON METHODS

Skin conditions and hyperpigmentation

Score, scale, auto-evaluation

Selection of instrumentation

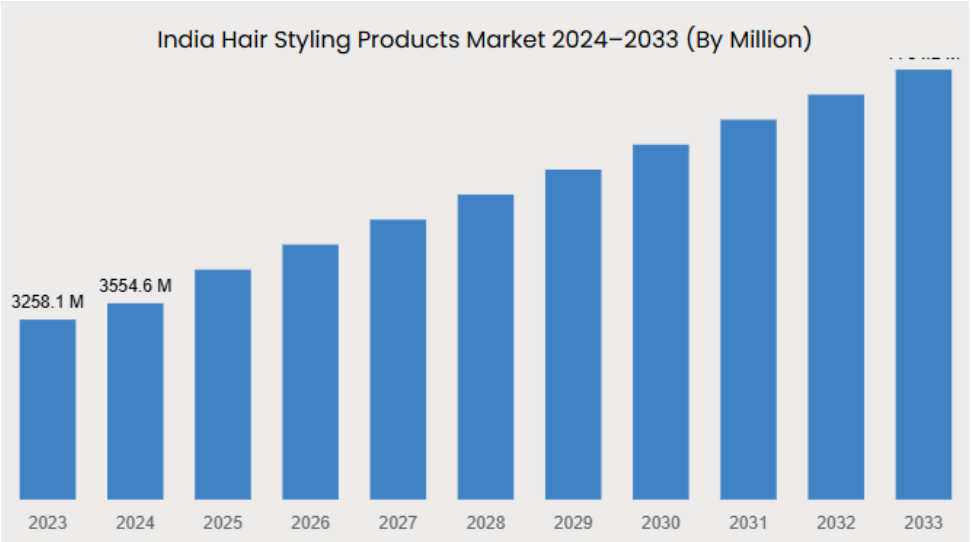
Color & pigmentation

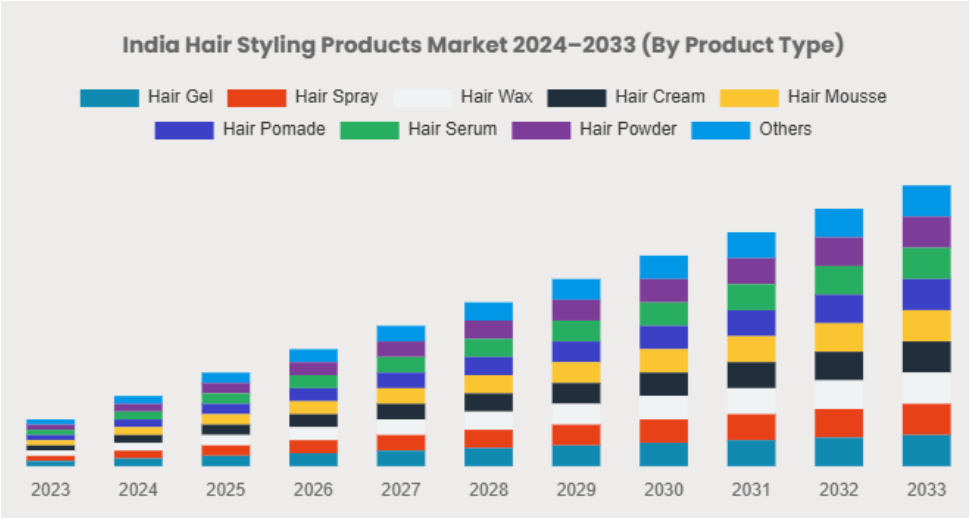
- Colorimeter - C+K
- TiVi 70 Skin Colour Tracker – Wheelsbridge
- C-Cube Clinical Research - Pixience
- DermaLab Colormeter - Cortex
- Antera 3D - **Miravex**
- SIAScope – Medxhealth
- SkinColorCatch – Delfin
- LC100 Spectrocolourimeter – Lovibond
- SkinCam – Qima-Newtone
- Attonics Spectrometer - Attonics

KEY TESTING TRENDS

#3 Hair: frizz control & smoothing

Smoothing
Frizz control
Shine enhancement
Heat protection
Curl-enhancing creams
Nourishing
Moisture retention
Scalp care
Growth



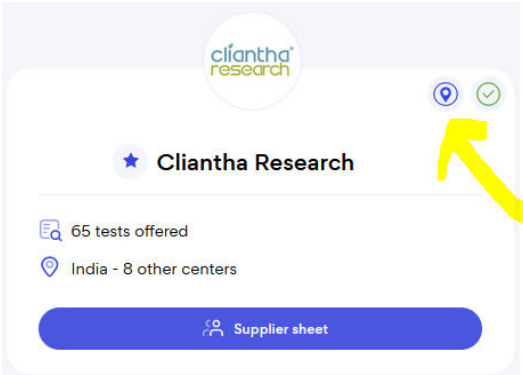


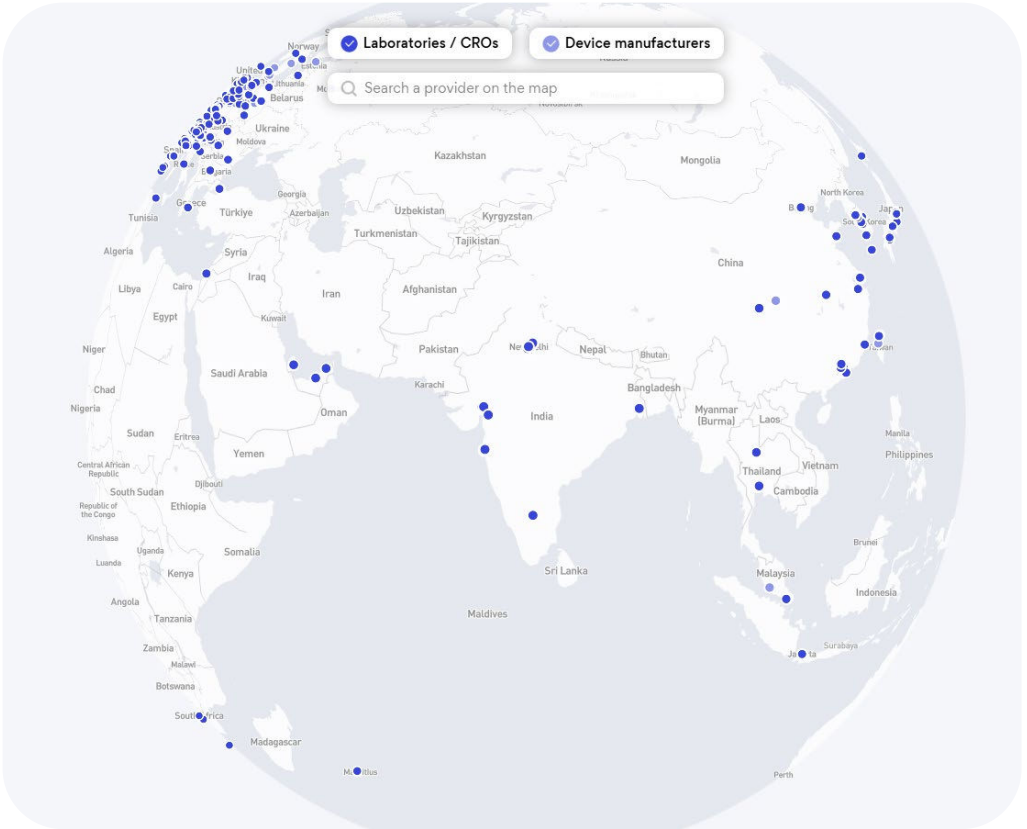
FOCUS ON TESTING

On skinobs platform in India

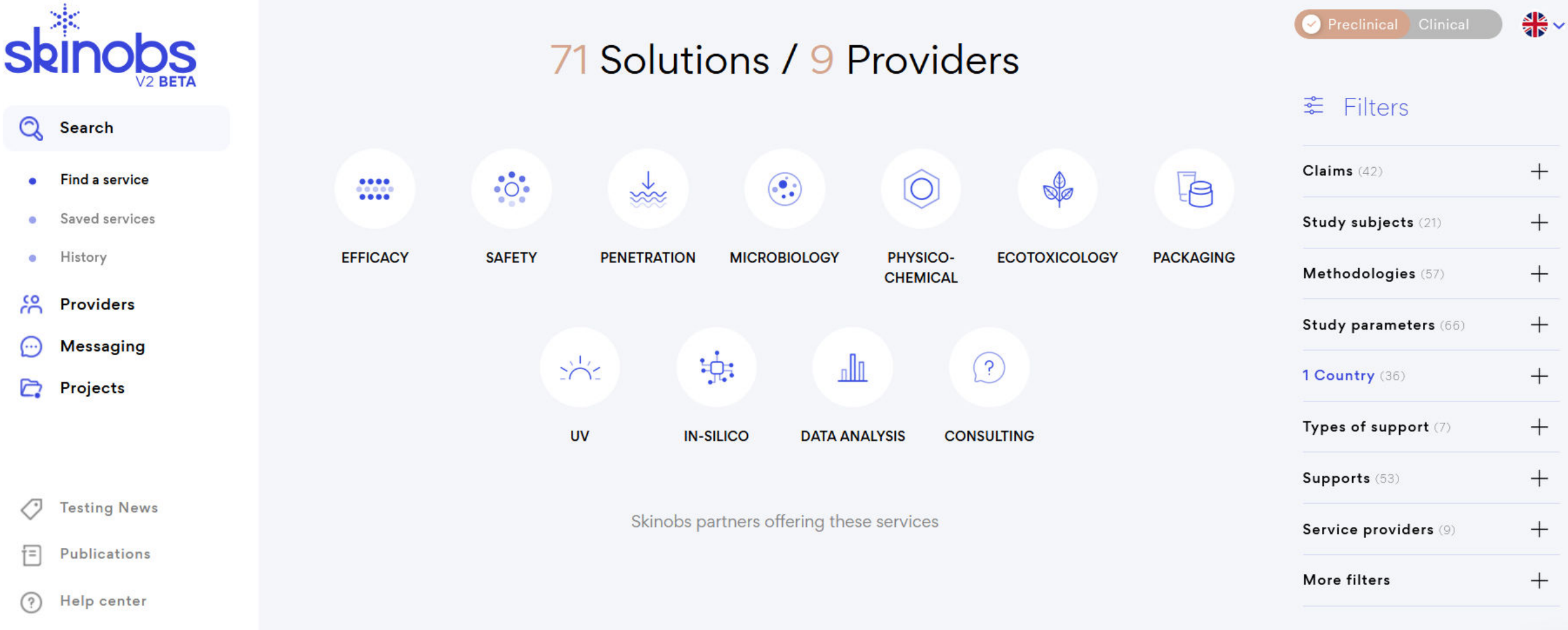
Clinical evaluation
- 249 methods
- 15 providers
- 205 claims

Preclinical assays
- 70 methods
- 9 providers
- 42 claims

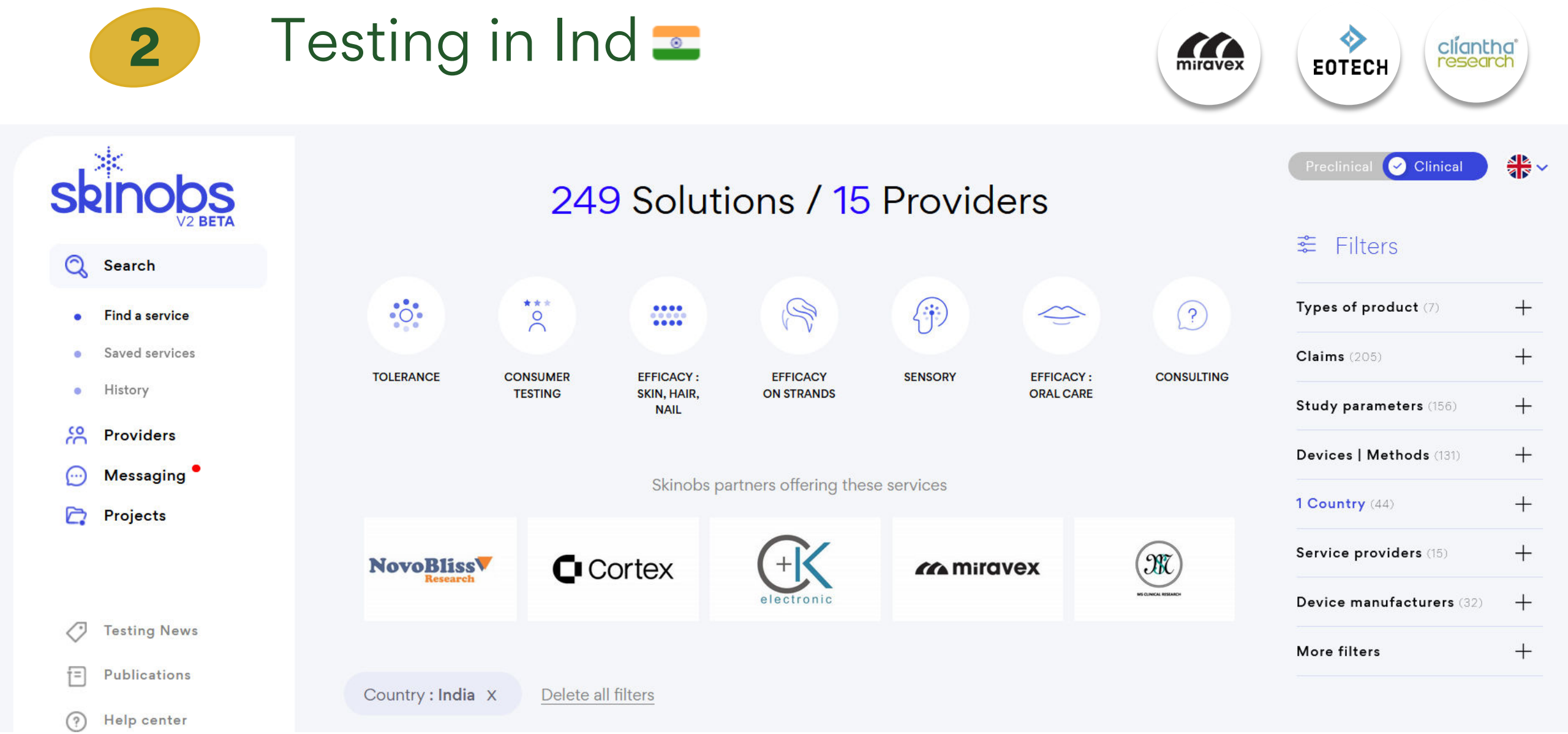




2 Testing in India



2 Testing in Ind



FOCUS ON TESTING

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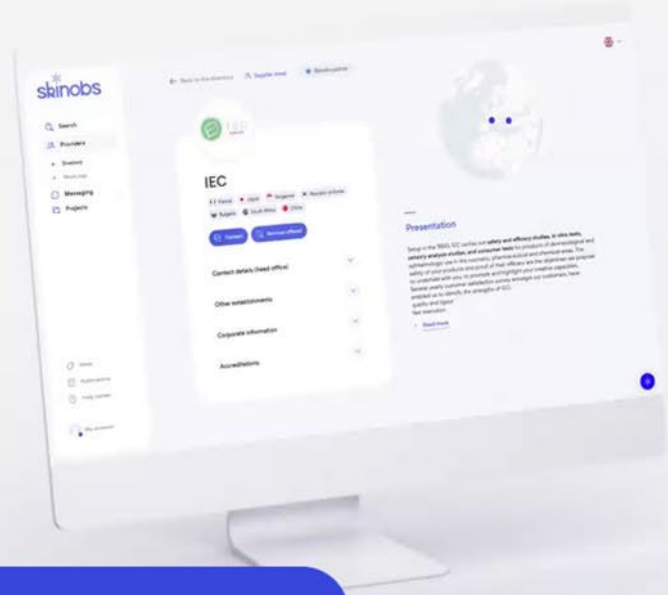

Search and compare more than **1,500 test methods** for your cosmetic ingredients or finished products. Get in touch with providers around the world.

Start your search:

Preclinical Trials

Clinical Studies

THANK YOUR FOR YOUR ATTENTION

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