



// ASIAN VARIETY

Market Report and Fragrance Proposals for
Household Care Products

// Agenda

1. A trip to...



2. Market Overview Fragrance

3. Market Products

4. Bell Fragrance Creations

5. Sources

6. Contact



// Vietnam

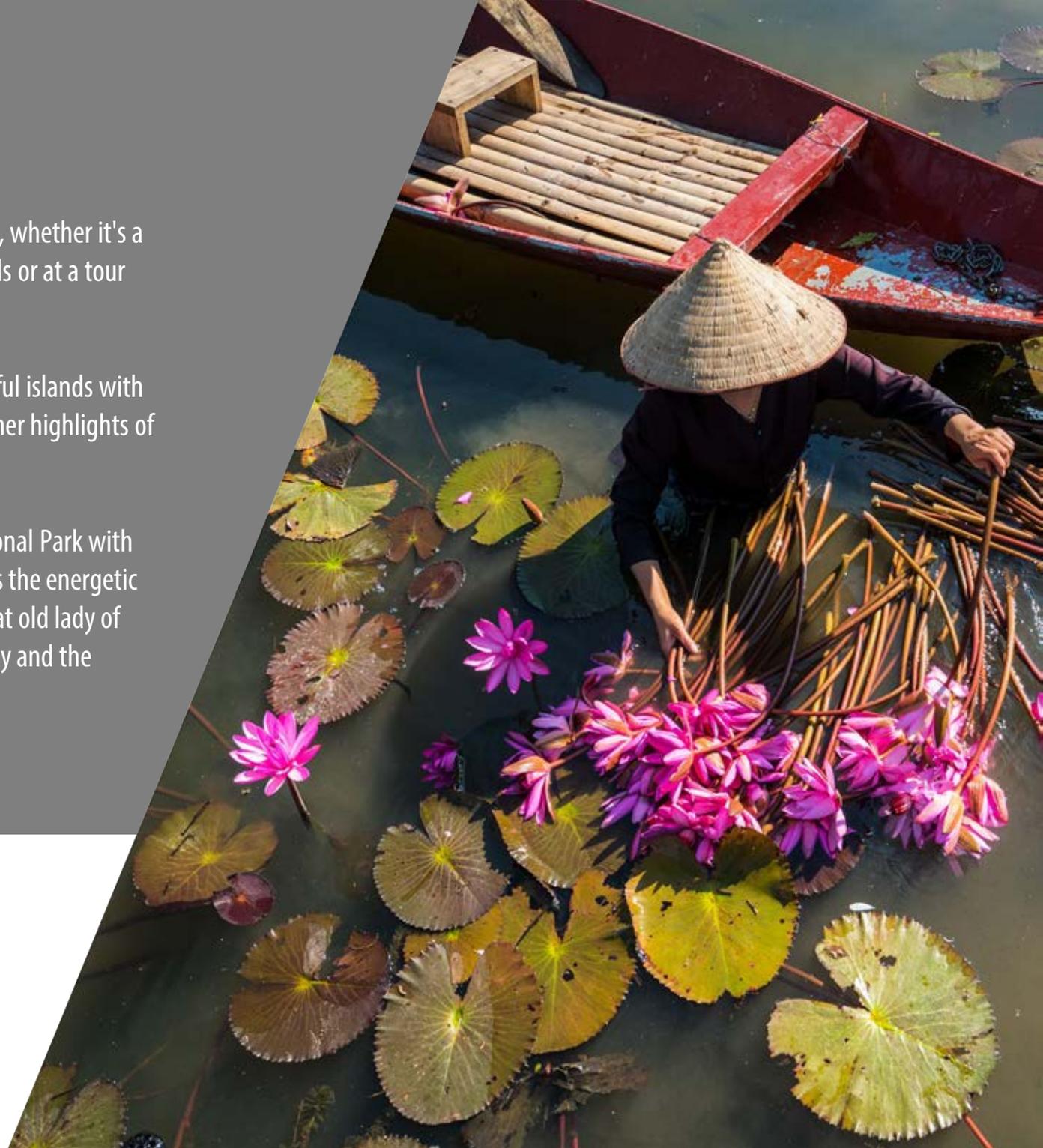
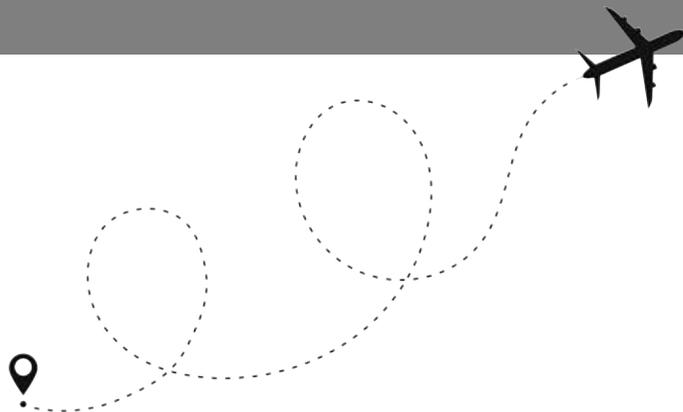
. . . blessed with a fascinating culture and one of the best cuisines in the world.

// Natural Beauty Vietnam

In terms of dramatic scenery, Vietnam has a lot to offer, whether it's a ride on azure blue waters past surreal chalkstone islands or at a tour across the beautiful inland mountain landscape.

Indigenous villages, spectacular sandy beaches, beautiful islands with a unique reef landscape and impressive temples are other highlights of Vietnam.

The obligatory program also includes the Cat Tien National Park with the beguiling tributaries of the Mekong Delta as well as the energetic metropolises of the country: The capital Hanoi, the great old lady of the Orient, and Ho Chi Minh City, engine of the economy and the whole Nation.



// Multifarious Culture

Many influences have shaped the country. In the south, Indian and Hindu culture is evident in Cham temples and spicy regional cuisine with spicy chili and mild coconut, while in the north Chinese influences are particularly noticeable.

In addition, there is the heritage from the French colonial era, which can be seen in Hanoi's beautiful boulevards, the imposing museums of Ho Chi Minh City as well as the crispy baguettes and the ubiquitous coffee culture.

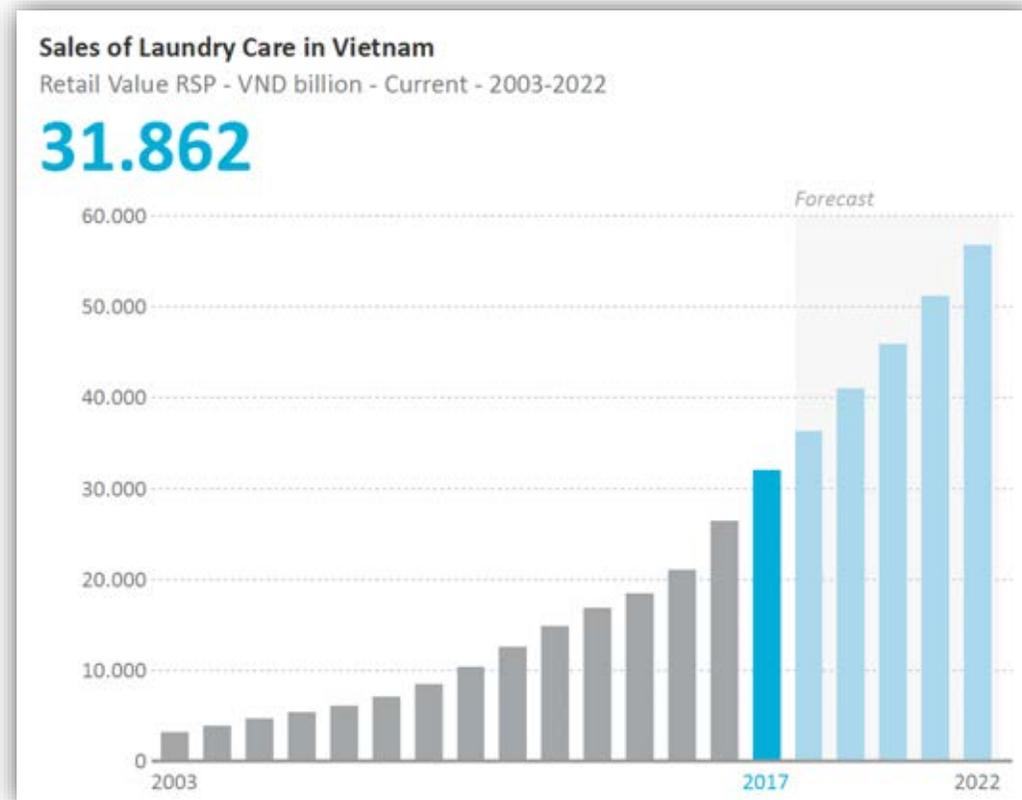
Together with the central provinces, which are both elegant and historical, the result is an exciting, intoxicating and unique country.



// Market Overview Vietnam – Laundry Detergent

Vietnamese consumers are very concerned about their appearance, especially in terms of hygiene. Therefore they have a high washing frequency.

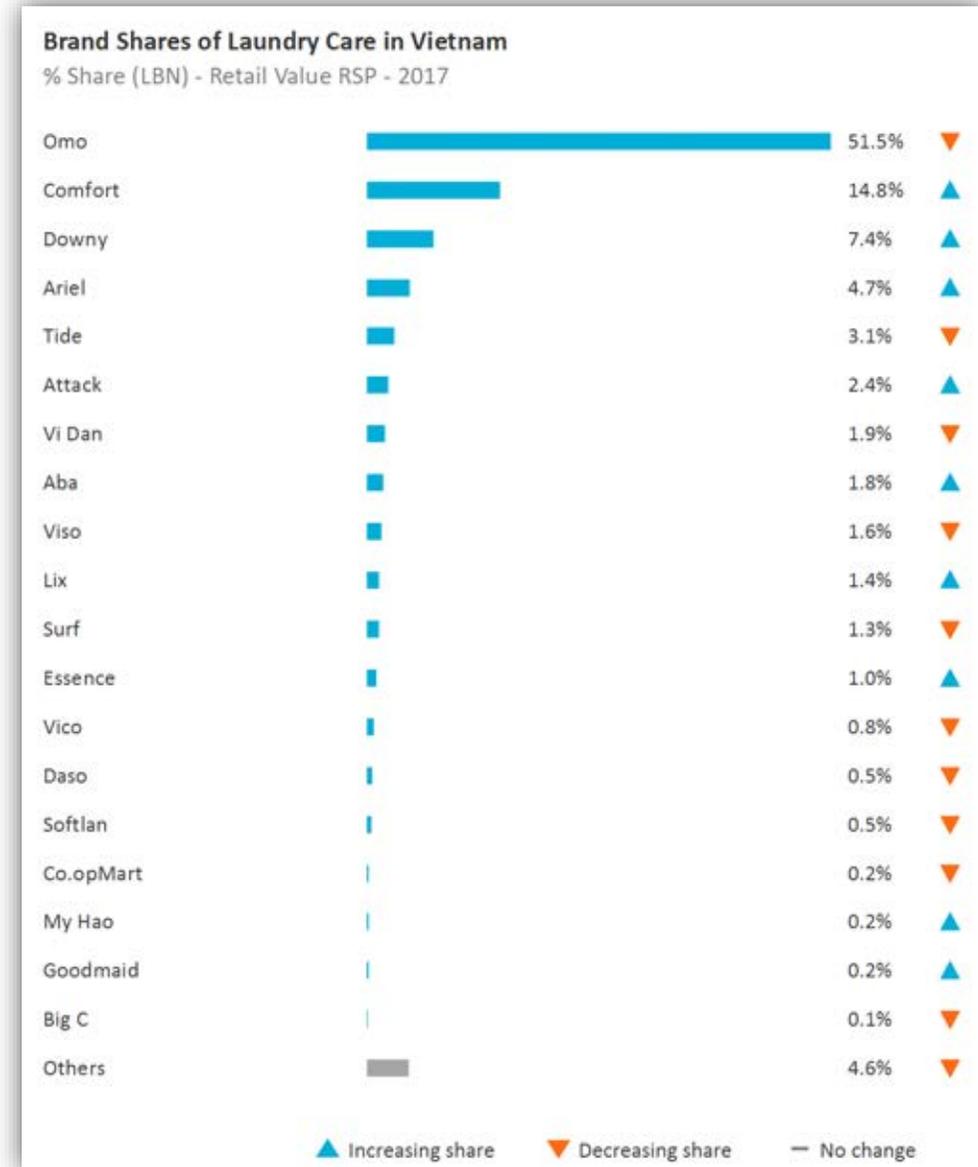
However, the majority of Vietnamese have little information about laundry care products other than detergents and fabric softeners. The main players in the laundry detergent sector promote their products as high performance in cleaning all stains, so that other products, such as stain removers, are not seen as necessary. Therefore detergents remain the leading category in the laundry care market.



The laundry care market in Vietnam saw an 21% increase in value to VND 31,862 billion in 2017.



// Market Overview Vietnam – Laundry Detergent



// Market Overview Vietnam – Laundry Detergent

Consumer behaviour influenced by cost and health issues

Despite improved living conditions and rising incomes, the majority of Vietnamese remain very price conscious. As a result, manufacturers are cooperating with retailers from different channels to offer discount programs.

At the same time, with increasing health awareness among Vietnamese consumers, health and ecologically safe products are particularly attractive, especially products for sensitive skin.

It is predicted that consumers with purchasing power will spend more money on products that offer ecological added value. Nevertheless, price is expected to remain one of the key factors in consumers' purchasing decisions.



// Market Overview Vietnam – Laundry Detergent

Social media plays a big role in the detergent market

Internet marketing activities are used aggressively by almost all manufacturers, notably Unilever Vietnam International Co Ltd and Procter & Gamble Vietnam Ltd, to support brands such as Omo, Comfort, Ariel and Downy. One of the main advantages of this marketing tool is cost efficiency compared to traditional marketing and advertising campaigns.

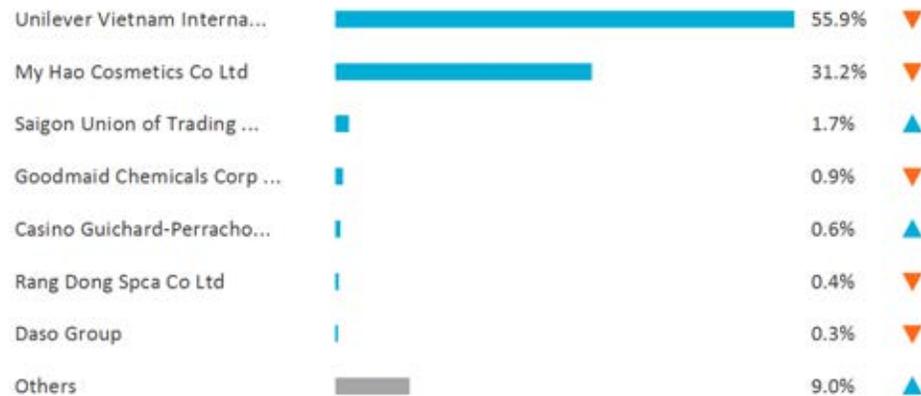
As living standards increase, demand for detergents and soft detergents can be expected. With the country's number of internet users rising, social media marketing campaigns are expected to be a major driver of retail sales growth in laundry care products.



// Market Overview Vietnam – Dishwashing Detergent

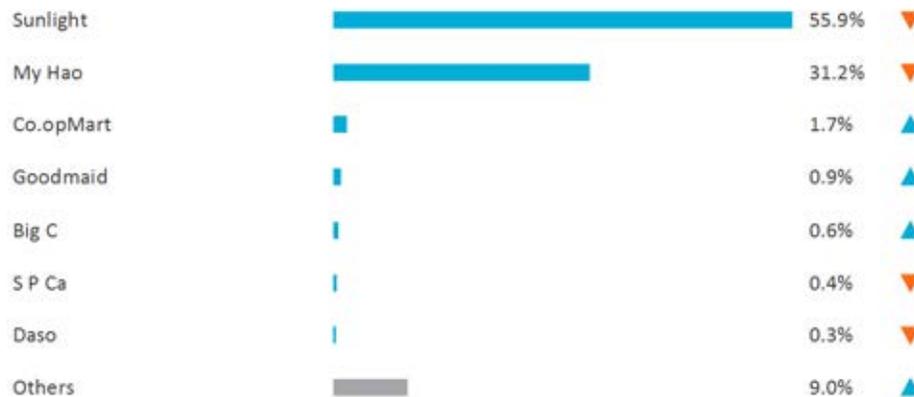
Company Shares of Dishwashing in Vietnam

% Share (NBO) - Retail Value RSP - 2017



Brand Shares of Dishwashing in Vietnam

% Share (LBN) - Retail Value RSP - 2017

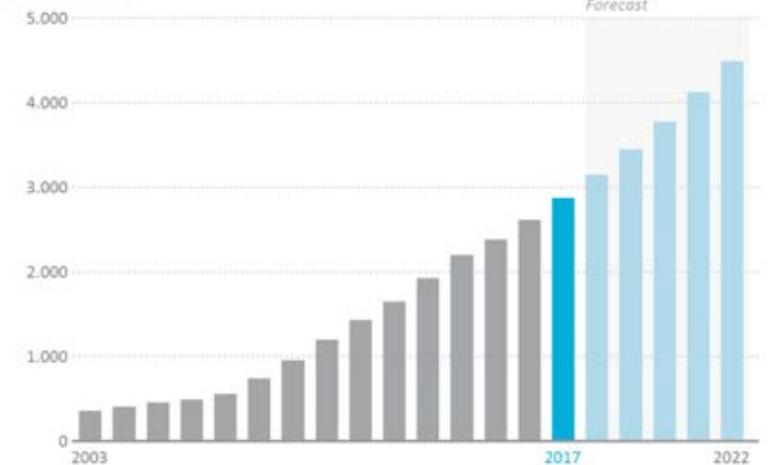


▲ Increasing share ▼ Decreasing share — No change

Sales of Dishwashing in Vietnam

Retail Value RSP - VND billion - Current - 2003-2022

2.854



// Market Overview Vietnam – Dishwashing Detergent

The market for detergents in Vietnam sees a 10% increase in value in 2017 to VND 2.854 billion.

Increased health awareness is driving demand for less harmful products.

The price sensitivity of the Vietnamese continues to be a major influencing factor:

- *Vietnamese consumers are price sensitive, especially in rural areas, and therefore prefer low-cost dishwashers*
- *a growing number of cheap dishwashing products of unknown origin can be found on the market*
- *as there are no quality labels for these products, consumer concerns about product safety are steadily increasing*



A traditional Chinese pagoda with multiple tiers and curved roofs is silhouetted against a vibrant sunset sky. The sun is low on the horizon, creating a warm orange and yellow glow. A full moon is visible in the upper right portion of the sky. The pagoda is situated on a hillside with some greenery in the foreground.

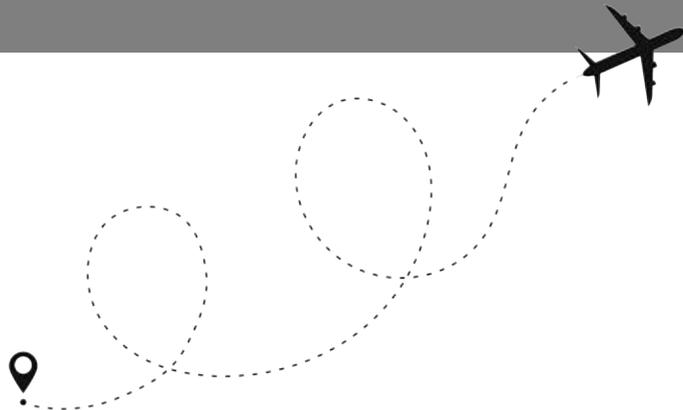
// China

... China is not a country, but a completely different world.

// Country of Contrasts

The scope ranges from gigantic cities with overflowing product ranges to more or less well-preserved monuments of the imperial dynasties, holy mountains and impressive caves to the epic vastness of Inner Mongolia and barren deserts - a country full of geographical and cultural contrasts.

But as pronounced as the contrasts is the beauty of the country. There is an infinite amount to see once you have learned the art of paving your way through crowds. Because China is the most populous country on earth.



// From Big Cities to Impressive Culture

Urban life is increasingly aligned with Western values and something of a wealthy middle class is evolving. The poor rural population, on the other hand, still carries out their arduous daily work in the traditional way, as they did 100 years ago.

China is also rich in cultural monuments, of which the Great Wall is undoubtedly one of the most impressive.



// Market Overview China

Cross-Border E-Commerce

In China, there are many customers who prefer to buy products from abroad directly, despite the huge range of goods. The reasons for this are concern about counterfeiting, doubts about the quality of domestic Chinese brands or the general unavailability of the desired product in China.

Some suppliers have recognized this gap in the market and offer through their cross-border e-commerce marketplaces the direct purchase of goods from abroad. Providers benefit from the large scope and popularity of the marketplaces in China and can, for example, ship the goods directly from Germany after sale.

The two German drugstores dm and Rossmann, which use Tmall Global as a platform for their business in China, have already followed this trend.



// Market Overview China

Mobile commerce and social shopping

China is also an impressive trendsetter in mobile commerce, with nearly 70 percent of all online purchases made via smartphones and tablets in 2016. Given a 95 per cent share of mobile internet users, this trend is hardly surprising.

In other words, when you go into the Chinese e-commerce business, every point of contact with the customer must be optimized for mobile use and context, because this is the only way to avoid bounce points and motivate the customer to buy.



// Market Overview China

Cleaning & Detergent Products

- Sales in the market for detergents and cleaning products are expected to be around €27,126 million in 2018
- According to the forecast, a market volume of around €30,000 million will be achieved in 2021, which corresponds to an annual sales growth of 3.4% (CAGR 2018-2021)
- The largest market segment is detergent with a value market volume of around €14,357 million in 2018
- Converted to population, about €19.54 per capita will be implemented in this market in 2018

Laundry Detergent

- Sales in the detergent segment are expected to be around €14,357 million in 2018
- According to the forecast, a market volume of €15,805 million will be achieved in 2021, which corresponds to an annual sales growth of 3.3% (CAGR 2018-2021)
- Converted to population, this market will account for around €10.34 per head in 2018



// Market Overview China

Dishwashing Detergent

- Sales in the dishwasher segment are expected to be around €6,333 million in 2018
- According to the forecast, a market volume of €7.101 million will be achieved in 2021, which corresponds to an annual sales growth of 3.9% (CAGR 2018-2021)
- Converted to population, this market will be converted to around €4.56 per head in 2018





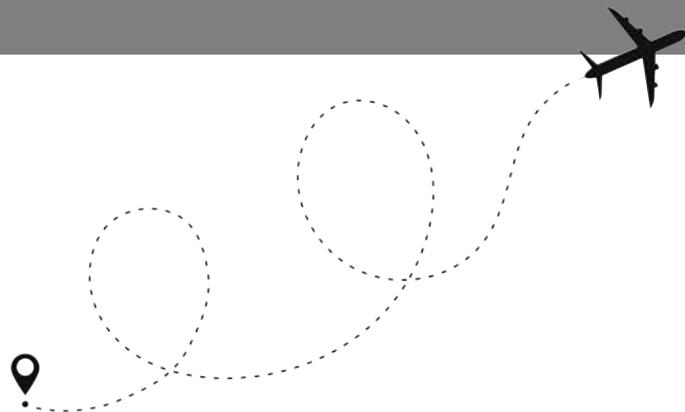
// *South Korea*

... modern country of high-tech, brilliant art and culture

// Between Tradition and Modernity

A country with an enchanting and varied landscape, whose special climate, striking seasons and multi-faceted vegetation is characterised by the constant change of individual mountain ranges and river plains.

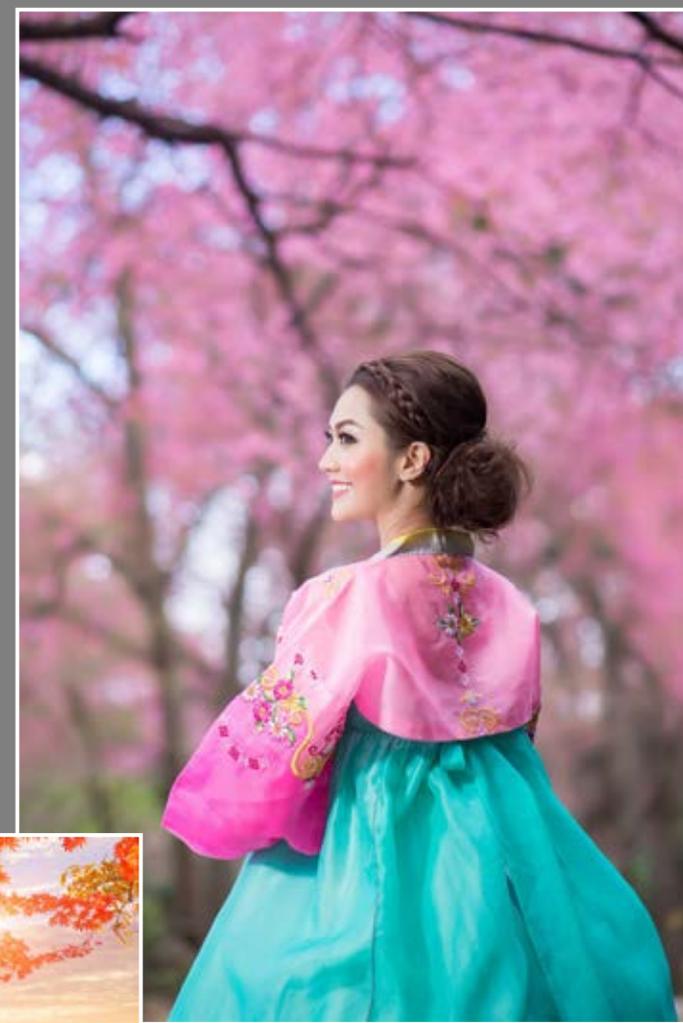
In South Korea, old and new are not opposites, but lived culture. South Korea's capital, Seoul, is the best example of the fluid transition of tradition and modernity in everyday life. Here, high-tech and innovations dominate all areas of life, illuminated advertising and shopping temples as far as you can see, with mighty city gates and historic palace complexes right in the middle.



//A Rich Heritage

Traditional rites, customs and witnesses of rich heritage are ubiquitous in South Korea. They pervade modern life like a red ribbon and are celebrated and lived by all generations. Symbol of generosity, harmony light-heartedness of the people of the country has been for a long time the traditional dress, the Hanbok. The robes, which have been handmade with love for centuries, express the Koreans' feelings like hardly any other garment today.

Numerous temples, pagodas and historical, holy sites are in modern times an expression of Korean Buddhism and allegory of the faith of the people of this country.



// Market Overview South Korea

Just a few decades ago, the South Korean republic was considered as a distant country in Western industrialized nations. The "land in between," surrounded by major powers such as China and Japan, was rich in cultural treasures and precious, traditional values, but not interesting in economic terms.

This has fundamentally changed. Within a very short time South Korea has moved into the league of the world's richest and most advanced countries in no time. Thanks to good infrastructure, a well-founded school system, first-class exhibitions and publications and not least through the alignment of major sporting and political events, South Korea has become the focus of global attention.

Numerous companies, especially the technology sector, are market leaders in the high-tech industry and pioneers in innovation. Nowhere in the world is the population more virtually connected and faster than in South Korea.



//Market Overview South Korea

Washing, cleaning & cleaning products

- Sales in the market for detergents, cleaning products and cleaning products are expected to be around €1,882 million in 2018
- According to the forecast, a market volume of €1,914 million will be achieved in 2021, which corresponds to an annual sales growth of 0.6% (CAGR 2018-2021)
- The largest market segment is the detergent segment with a value market volume of around €879 million in 2018
- Converted to population, about €36.77 per capita will be implemented in this market in 2018

Laundry Detergent

- Sales in the detergent segment are expected to be around €879 million in 2018
- According to the forecast, a market volume of €920 million will be achieved in 2021, which corresponds to an annual sales growth of 1.5% (CAGR 2018-2021)
- Converted to population, this market will be implemented in 2018 for around €17.18 per head



// Market Overview South Korea

Dishwashing Detergent

- Sales in the dishwasher segment are expected to amount to around €143 million in 2018
- According to the forecast, a market volume of €146 million will be achieved in 2021, which corresponds to annual sales growth of 0.5% (CAGR 2018-2021)
- Converted to population, this market will be converted to around €2.80 per head in 2018

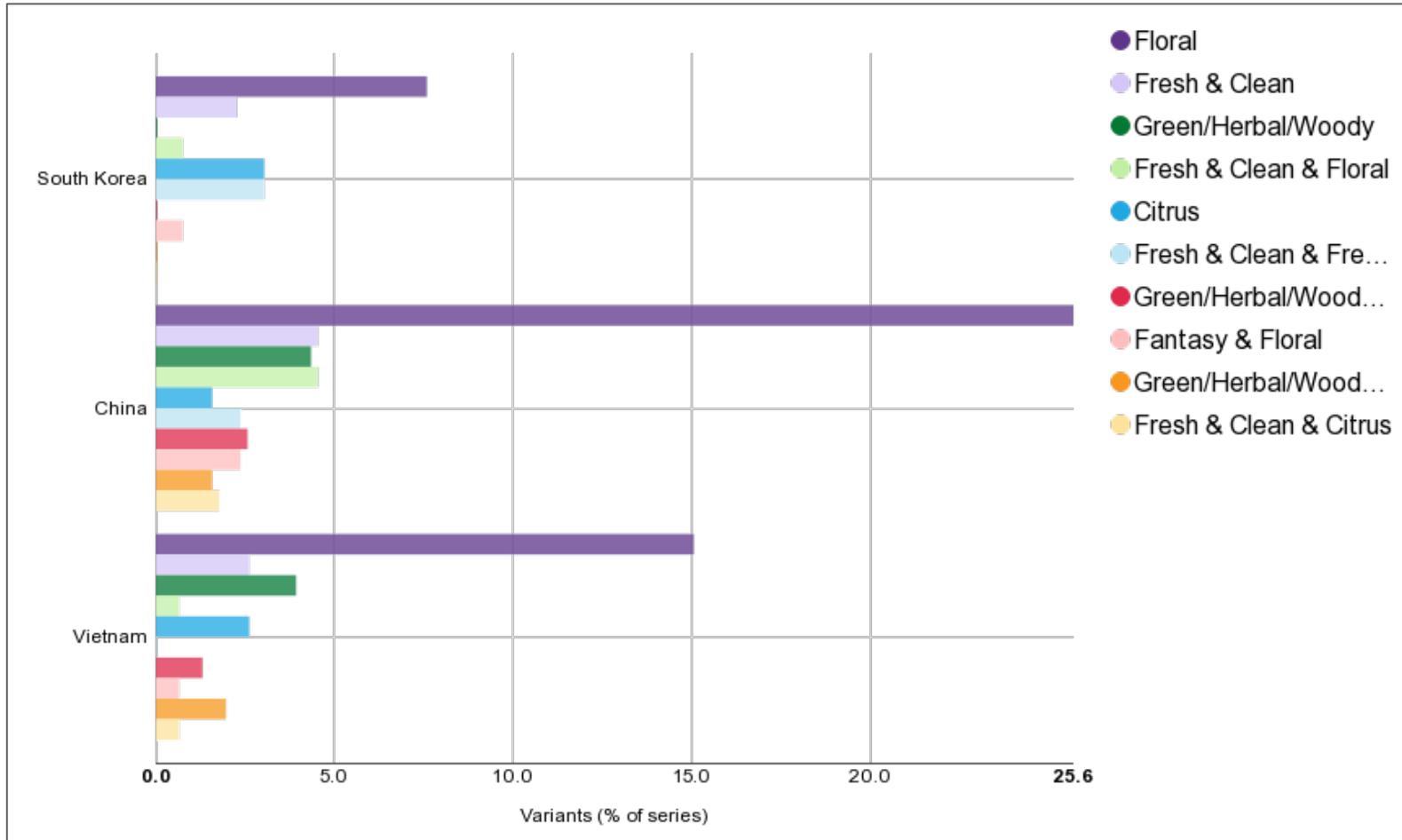




// Market Overview Fragrance

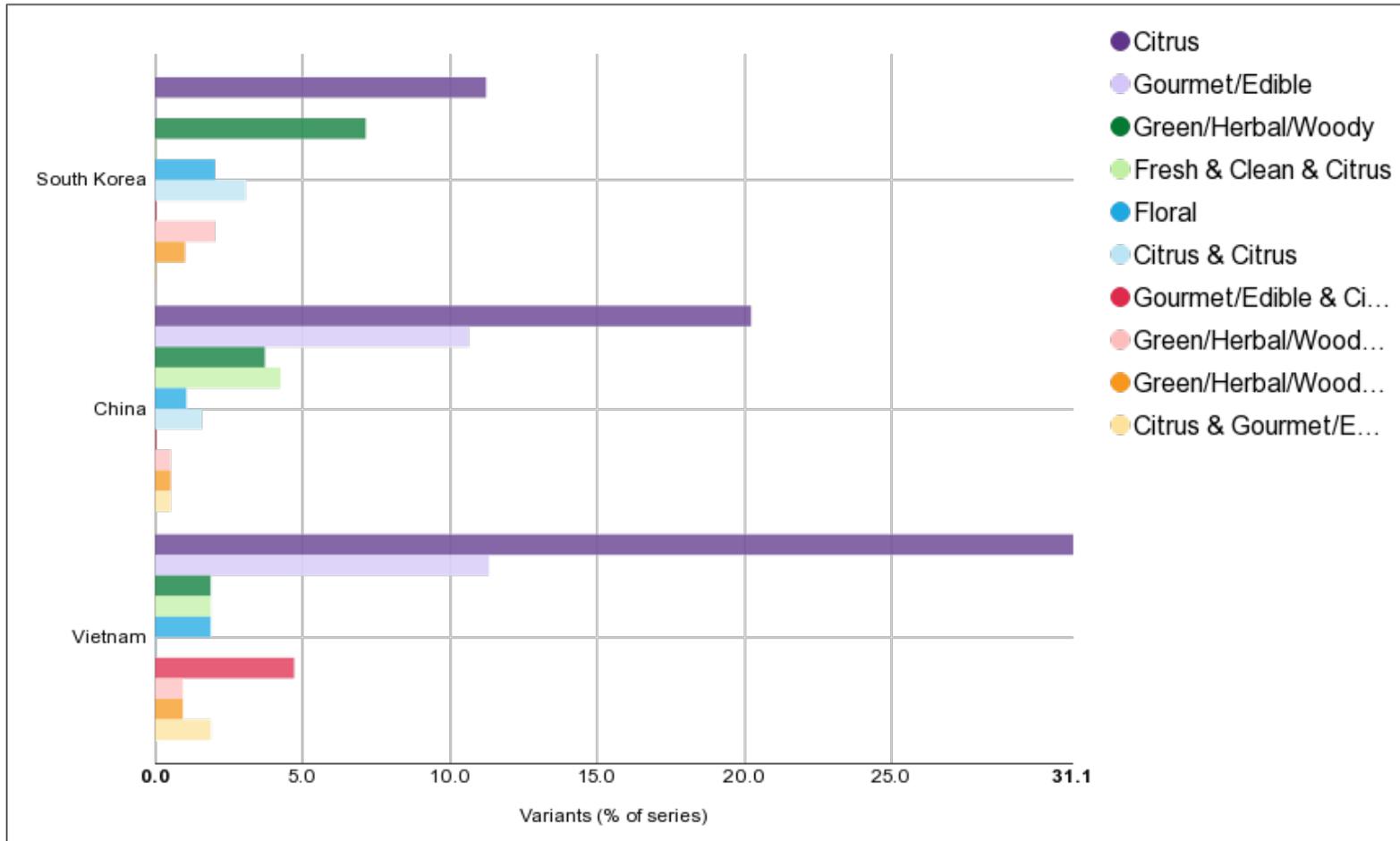
// Market Overview Fragrance– Laundry Detergent

Country vs Fragrance Group (Sub-Category matches Automatic Detergents; Date Published is within the last three complete years)



// Market Viewing Fragrance– Dishwashing Detergent

Country vs Fragrance Group (Sub-Category matches *Dishwashing - Hand*; Date Published is within the last three complete years)



A close-up photograph of a person's hands being washed under a stream of water from a chrome faucet. The person's face is partially visible on the left, looking down at their hands. The background is a soft-focus green, suggesting an outdoor or garden setting. A dark grey horizontal bar is overlaid on the lower left portion of the image, containing the text '// Market Products' in white, italicized font.

// Market Products

// Market Products— Laundry Detergent



brand: Tide
producer: Procter & Gamble
country: China
launch: June 2017
scent: **Lavender**



brand: Spy
producer: Massco International
country: Vietnam
launch: May 2017
scent: **Blossom**



brand Surf
producer: Unilever
country: Vietnam
launch: May 2017
scent: **Flower & Grass**



brand: WhiteCat
producer: WhiteCat
country: China
lunch: August 2017
scent: **Natural & Refreshing**



brand: Persil
producer: Henkel Homecare
country: South Korea
launch: November 2017
scent: **Pure & Fresh**

// Market Products – Dishwashing Detergent



brand: Earth Choice
producer: Natures Organic
country: Vietnam
launch: September 2015
scent: **Aloe Vera**



brand: Ecos
producer: Earth Friendly Products
country: South Korea
launch: October 2016
scent: **Lavender**



brand: Enbliss
producer: Consensus
country: South Korea
launch: October 2017
scent: **Grapefruit**



brand: Topval
producer: Aeon
country: China
launch: October 2017
scent: **Green Apple**



brand: Mr. Prince
producer: Qi Shun Daily Product
country: China
launch: December 2017
scent: **Pomegranate**



// Bell Fragrance Creations

For laundry care and dishwashing detergent

// Bell Fragrance creation for laundry care

(Color-/Heavyduty Detergent)

0792006

Summer Dream FLWM

Top: fresh, green, fruity, orange, peach

Heart: herbal, floral, tea rose, jasmine, ylang,
fenugreek

Base: woody, cedar wood, sandelwood,
ambergis



// Bell Fragrance creation for laundry care

(Color-/Heavyduty Detergent)

0814135

Rose Garden XC extra

Top: green citrus notes

Heart: creamy, spicy rose

Base: coniferous, woody, powdery,
strong honey



// **Bell Fragrance creation for laundry care**
(Wool Detergent)

0800400
Wild Orchid

Top: leafy green

Heart: floral, exotic, orchid, fruity

Base: sweet, musk



// Bell Fragrance creation for laundry care

(Wool Detergent)

8000805

Flora Fresh

Top: fresh, green, fruity, berry, aquatic,
grass, apple, peach

Heart: aldehyde, floral, rose, jasmine, violets

Base: ambery, woody, powdery



// Bell Fragrance creation for laundry care

(Black-/Mild Detergent)

0808349

Black Pearl

Top: creamy, green, apple, raspberry

Heart: floral, violet, rose, lily of the valley

Base: strong woods, chocolate, mocha



// **Bell Fragrance creation for laundry care**
(Black-/Mild Detergent)

0807588

Aloe Gentle Freshness DF

Top: green, slightly watery, aloe vera,
apple, pineapple

Heart: floral, green, fruity, rose, ylang-ylang,
jasmine

Base: floral, musk



// Bell Fragrance creations for Dishwashing Detergents

8600203 Double Lime extra

Top: leafy green, lemon, lime, orange

Heart: flowery accents

Base: vanilla



// Bell Fragrance creations for Dishwashing Detergents

8600190

OraMandarinDF

Top: agrumic, orange, mandarin, watery
melon

Heart: floral, rose, fruity, pineapple

base: sweet, spicy, creamy, vanilla, clove



// Sources

Photo Material

- Adobe Stock

Market data

- Euromonitor International
- Mintel GNPD
- Statista

Content/Texts

<https://www.suedkorea-reisen.de/landesinfos-suedkorea/suedkorea-tradition-moderne/>

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<https://de.statista.com/outlook/60010000/125/waschmittel/suedkorea>

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