



# Health & Beauty Trends

GUARDIAN VIETNAM

**Dairy**  
**Farm**

guardian



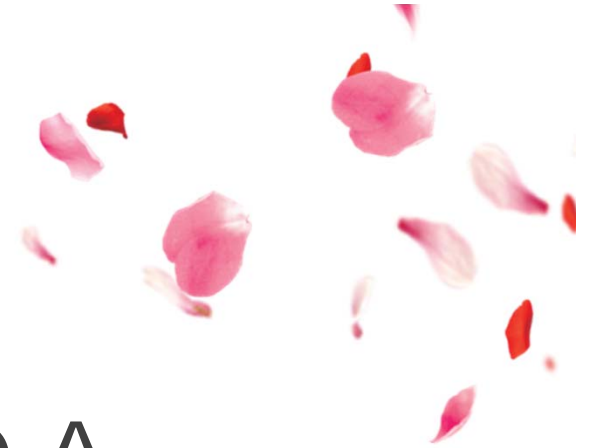
# PAWIN SRIUSVAGOOL

General Director Guardian  
Vietnam

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- Thai National
- Expertise in retail operations, luxury retail, brand building, net work expansion, CRM, integrated marketing, strategy, M&A
- Worked and lived in 7 different countries (USA, UK, Thailand, Singapore, Hong Kong Macau and Vietnam)
- 6.5 years of CEO experience (last role with Zung Fu Motors, Exclusive Dealership of Mercedes Cars in Macau)
- 2.5 years working in Vietnam

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# AGENDA

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- Dairy Farm & Guardian
- Consumer trends
- Health & Beauty Landscape

01

# Dairy Farm & Guardian

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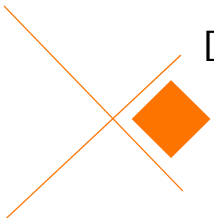
Dairy Farm is a leading pan-Asian retailer. Operating in 12 countries.

Dairy Farm has 7,400 outlets and employed over 200,000 people.

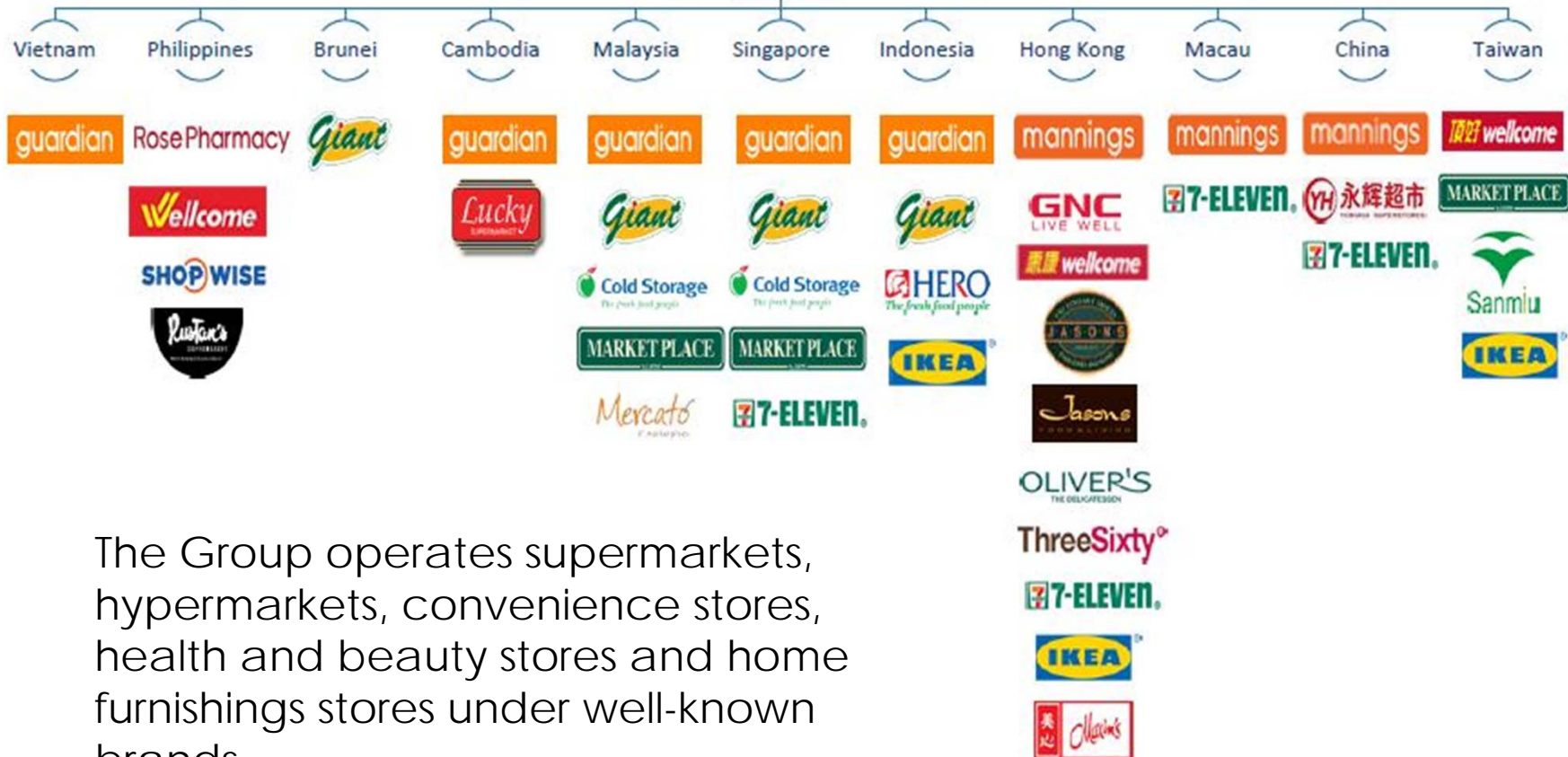
Annual sales of US\$ 21 billion.

Market capitalization of US\$ 12 billion.

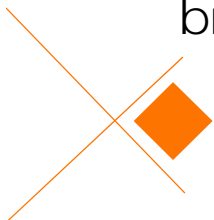
Dairy Farm is a member of the [Jardine Matheson Group](#).



## Dairy Farm Group



The Group operates supermarkets, hypermarkets, convenience stores, health and beauty stores and home furnishings stores under well-known brands.





# GUARDIAN VIETNAM

## Who are we?

Specialized retailer  
in Beauty, Personal  
care and  
Healthcare.

## Our customers

Vietnamese  
consumers  
Middle class



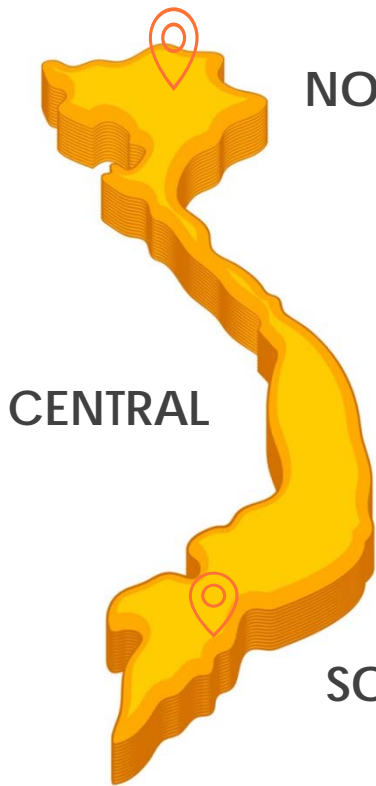
## Our strengths

“Trusted brand with  
strong heritage in  
health & beauty.”



# GUARDIAN VIETNAM

Total # of stores: **74 stores**



**NORTH**

**Hanoi**

10 stores

**HCMC**

60 stores

**Vung Tau**

3 stores

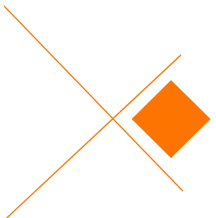
**SOUTH**

**Dong Nai**

1 stores



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# GUARDIAN VIETNAM

Our stores



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A vibrant party scene with confetti and a woman in a yellow shirt dancing. The background is filled with colorful streamers and people celebrating. In the foreground, a woman with long dark hair, wearing a bright yellow t-shirt and light blue jeans, is smiling and dancing with her arms raised. The air is filled with multi-colored confetti. In the background, other people are visible, some playing musical instruments like a violin. The overall atmosphere is festive and joyful.

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## Consumer Trends in Vietnam

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# 4 KEY BEAUTY TRENDS

## VIETNAM

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### Digitalization

VN is a young & dynamic market representing a huge commercial opportunity for brands, marketers and investors.

### Regime sophistication

Appearance and well becomes more important.

### Natural trend

Beauty consumers repertoire expanding to natural based & authentic ingredients.

### Premiumization

With higher standard of living, consumers tend to use more premium products.





# REGIME SOPHISTICATION

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People, women in particular, care more about their **appearance** and **wellbeing**. It means there will be a big room for beauty products.

Beauty **repertoire** **expand** **significantly** through diverse assortments, such as Facial care, Facial foam, Cosmetics remover, Sun protection, etc.

# PREMIUMIZATION



Vietnamese consumers have higher standard of living which give them chance to **spend more** on **deluxe and luxury** products, especially in **Face and Skin care**.



## NATURAL TREND

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"Green means Growth" & "Health is Wealth" perspective are the key factors drive consumers lifestyle.

79% Vietnamese willing to pay more for **Nature based products** and **Authentic ingredients**.



# DIGITALIZATION

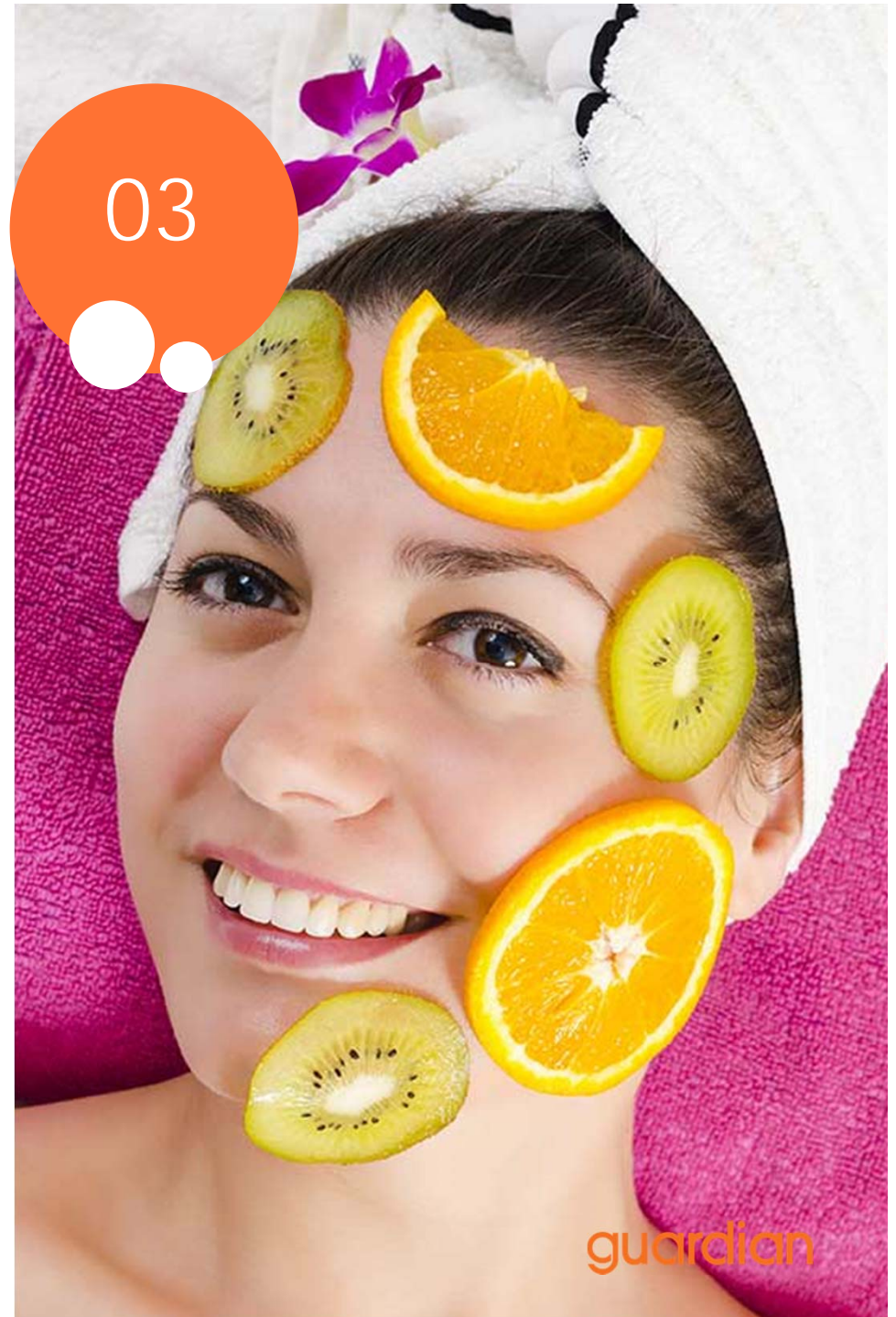
Vietnam is among the countries in ASEAN with relatively high growth rates in the **digital economy**.  
High correlation between search and purchase online.

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# HEALTH & BEAUTY CHANNELS

- Traditional Trade
- Independent shops
- Modern trade (specialist)
- E-commerce & Online

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# CHANNEL SWITCHING



## Independent shops

Blooming in recent years.



## E-commerce

Fast moving, yet facing a big nut.

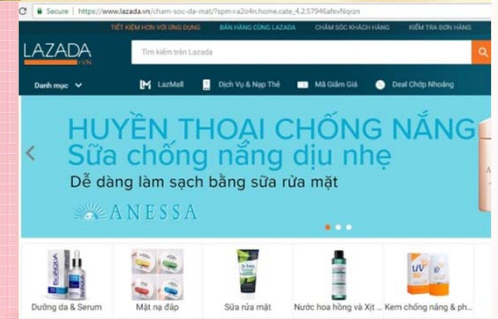
## Traditional Trade

Small shops; popular in the past.



## Modern Trade

Gaining trust from consumers.



# Opportunities vs. challenges



- Vietnam will have ~30m people categorized under the middle class
- Size of the prize is large for modern trade vs total trade.
- More sophisticated buying behavior

- Complex and time-consuming on local regulations regarding importations
- Rising cost on rental and labor
- High cost on logistics and delivery
- Competitive retail market landscape



THANK  
YOU

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