

# The Moment That Will Decide Who Leads the Next Era of Beauty

How science, sensory experience, and strategic speed are reshaping the future of beauty manufacturing across ASEAN and beyond.

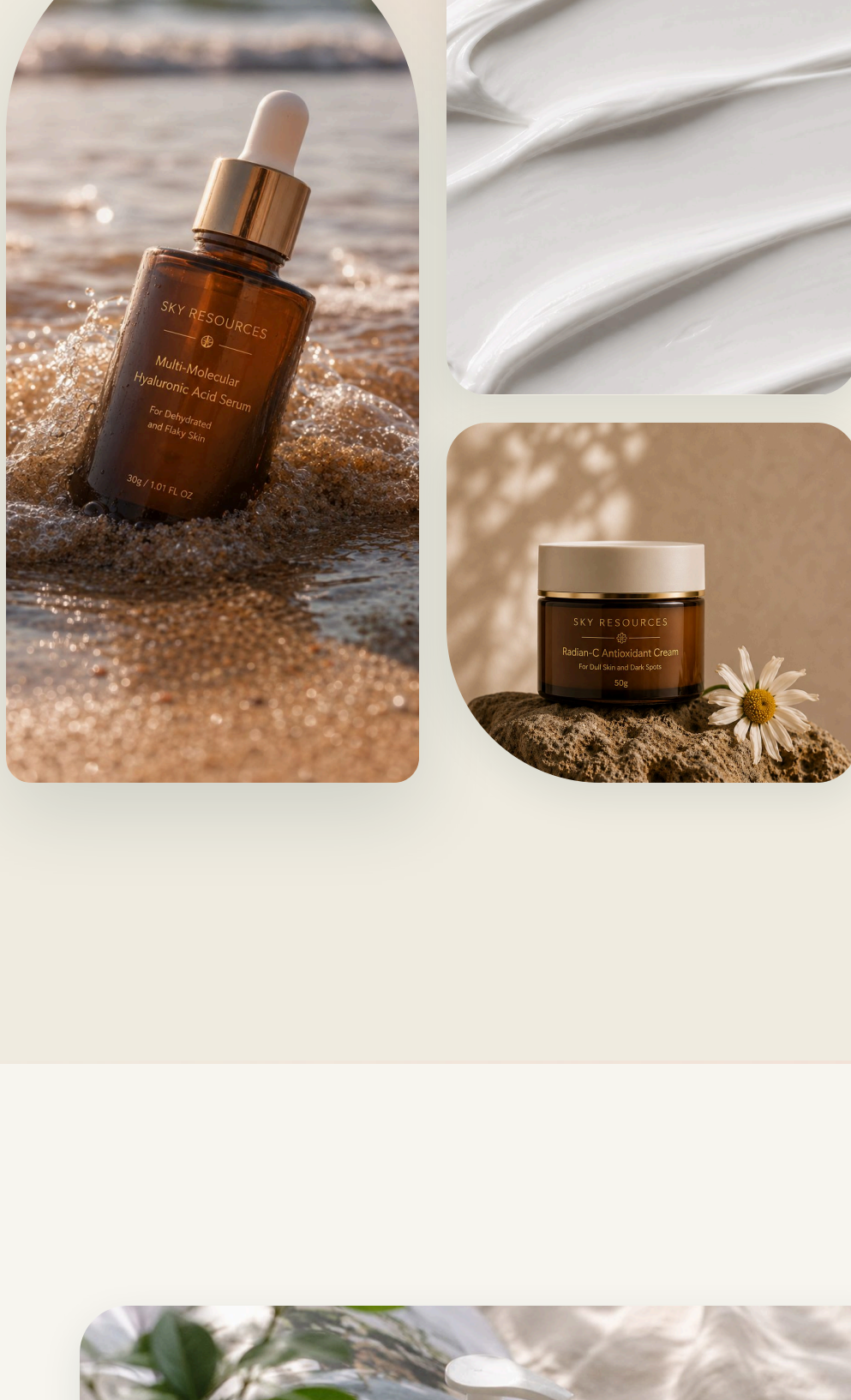
**\$580B+**  
GLOBAL BEAUTY MARKET

**6.1%**  
GLOBAL CAGR

**\$2.5B+**  
MALAYSIAN MARKET

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## 02 MARKET OVERVIEW

### A New Paradigm Is Redrawing How Beauty Grows

The rules of beauty growth are evolving faster than ever, unlocking extraordinary new opportunities.

Consumers are no longer satisfied with products that simply cover the surface. They crave experiences that awaken the senses, enrich daily wellness, and align with their values. Biotechnology is weaving its way into commercial formulations, unlocking textures and results once reserved for clinics alone.

For OEM and private label partners in ASEAN, this is a defining moment. Success no longer comes from producing the most or the cheapest — it comes from formulations that feel transformative, textures that captivate, and supply chains that respond with agility.



#### GLOBAL MARKET 2026

**\$580B**

Global beauty market value, outpacing general consumer goods at 6.1% annual growth.

#### ASIA PACIFIC SHARE

**37.7%**

Asia Pacific commands over a third of all global beauty revenue — and rising.

#### HALAL COSMETICS

**\$47–53B**

Global Halal cosmetics market; Asia Pacific leads with 64% of demand.

#### ASEAN CLEAN BEAUTY

**\$3.5B**

Organic and clean beauty market in ASEAN, growing 9.2% per year.

#### MALAYSIAN MARKET

**\$2.5B+**

A living laboratory for global formulation strategy.

#### E-COMMERCE SHARE

**18%**

Of domestic beauty sales now driven through e-commerce in Malaysia.

*“Asia Pacific is not just participating in global trends, it is shaping them. Ethical sourcing, Halal compliance, and clean formulations are no longer optional. They are expected.”*

SKY RESOURCES GROUP • 2026 STRATEGIC ANALYSIS

## 03 TREND HIGHLIGHTS

### Where Breakthrough Ideas Become Tomorrow’s Must-Have Beauty

Beyond the surface — the biotechnology and sensoriality revolution transforming every category.

In 2026, consumers seek more than results. They want products that awaken the senses, connect to well-being, and transform everyday routines into moments of delight — communicating efficacy through touch, sight, and scent while delivering tangible skin benefits.



#### SENSORIALITY & NEUROSCIENCE-ALIGNED BEAUTY

##### Texture as the New Measure of Efficacy

Every bounce, glide, or melt signals that a product is working. Cooling calms the mind, warming soothes the spirit, and carefully chosen scents lower stress — making beauty both functional and comforting.

###### J-BEAUTY

###### Mochi Skin Architecture

Ceramide • Biotech Peptides

Soft, plump, and resilient — rebuilding natural collagen and elastin for deep hydration without clogging pores. The ultimate soft-focus glow.

###### K-BEAUTY

###### Slow-Aging Energy Renewal

Oxygen • Snow Algae • Peptides

Built on Korea’s prevention-first philosophy — boosting skin energy, reinforcing longevity factors, and supporting natural renewal for luminous, resilient skin.

###### M-BEAUTY

###### Climate-Adaptive Halal-Clinical

Postbiotic Serums • Urban Defense

Designed for equatorial climates — protecting against sweat, pollution, and blue light. Halal-certified, high-performance for the modern urban professional.

#### LONGEVITY SCIENCE

##### Marine Biotech • The Prestige Frontier

The shift from anti-ageing to skin longevity. Our proprietary DuoAlgae™ combines marine and alpine algae for next-level resilience in premium formulations.

#### MICROBIOME 2.0

##### Barrier Balance for the Equatorial Climate

Prebiotic and postbiotic technologies restoring harmony to the skin ecosystem — powered by Yacon Root Juice and microbiome-friendly actives for ASEAN skin.

#### SKIN-FIRST MAKEUP

##### The Hybrid Beauty Revolution

The boundary between skincare and colour has dissolved. Serum foundations, treatment cushions, and brightening tints that actively improve skin with every application.

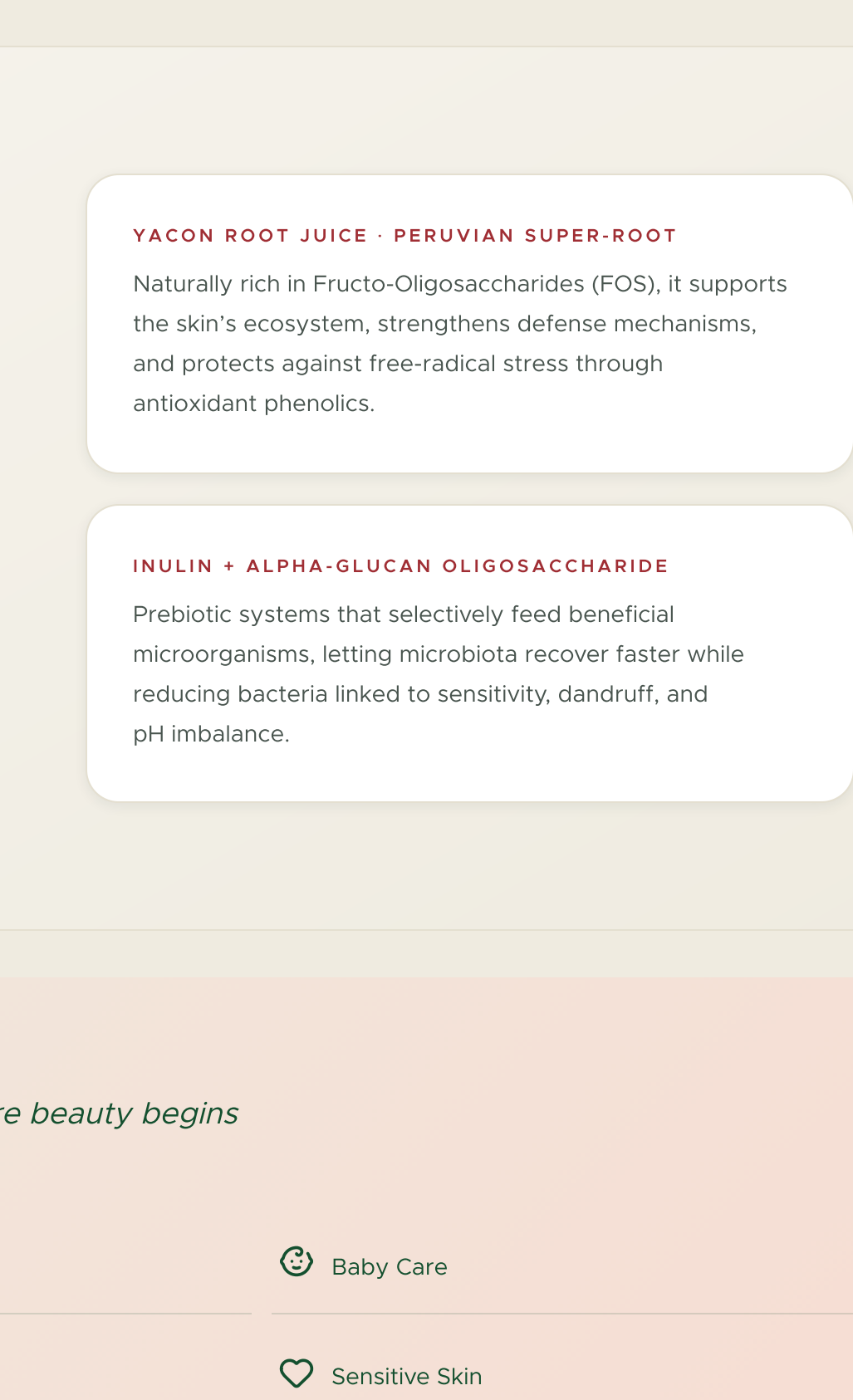
#### LONGEVITY SCIENCE • SRG PROPRIETARY

##### DuoAlgae™ • Marine Biotech, the New Prestige Frontier

Consumers are no longer only correcting visible signs of ageing — they are investing in formulas that preserve skin strength, vitality, and resilience for the long term. The conversation has moved from repair to preservation.

At the heart of this movement is DuoAlgae™, our signature complex combining Easy Algae (Marine Plankton Extract) with Snow Algae (Coenochloris signiensis). It deeply conditions, reinforces barrier support, and maintains an energized appearance — each application rich, cocooning, and restorative.

- Skin Longevity
- Barrier Reinforcement
- Deep Conditioning
- Antioxidant Defense
- Radiance & Vitality



#### MICROBIOME 2.0 • BARRIER BALANCE

##### Ecosystem Skincare for the Equatorial Climate

In Southeast Asia, skin is under constant pressure — heat, humidity, sweat, and pollution disrupt the natural microbiota, weakening the barrier and triggering sensitivity, redness, and imbalance. Microbiome skincare is no longer optional.

Microbiome 2.0 is powered by prebiotic and postbiotic technologies that restore balance where skin needs it most, nourishing beneficial flora while reducing harmful microorganisms.

- Yacon Root Juice
- Inulin
- Alpha-glucan Oligosaccharide
- Climate-Adaptive

#### YACON ROOT JUICE • PERUVIAN SUPER-ROOT

Naturally rich in Fructo-Oligosaccharides (FOS), it supports the skin’s ecosystem, strengthens defense mechanisms, and protects against free-radical stress through antioxidant phenolics.

#### INULIN • ALPHA-GLUCAN OLIGOSACCHARIDE

Prebiotic systems that selectively feed beneficial microorganisms, letting microbiota recover faster while reducing bacteria linked to sensitivity, dandruff, and pH imbalance.

#### WHY THIS MATTERS FOR ASEAN

This is not just ingredient science — it is ecosystem skincare, where beauty begins by protecting what naturally protects us.

- Facial Skincare
- Scalp & Anti-Dandruff
- Baby Care
- pH-Balance Products
- Feminine Hygiene
- Sensitive Skin

#### INTELLIGENT LONGEVITY FOR HAIR

### Scalp-First Architectures • The Skinification of Hair

When the scalp is treated like facial skin, hair care becomes a science-led wellness category.

**51%**

SURGE IN ‘SCALP DETOX’ SEARCHES

**\$105B**

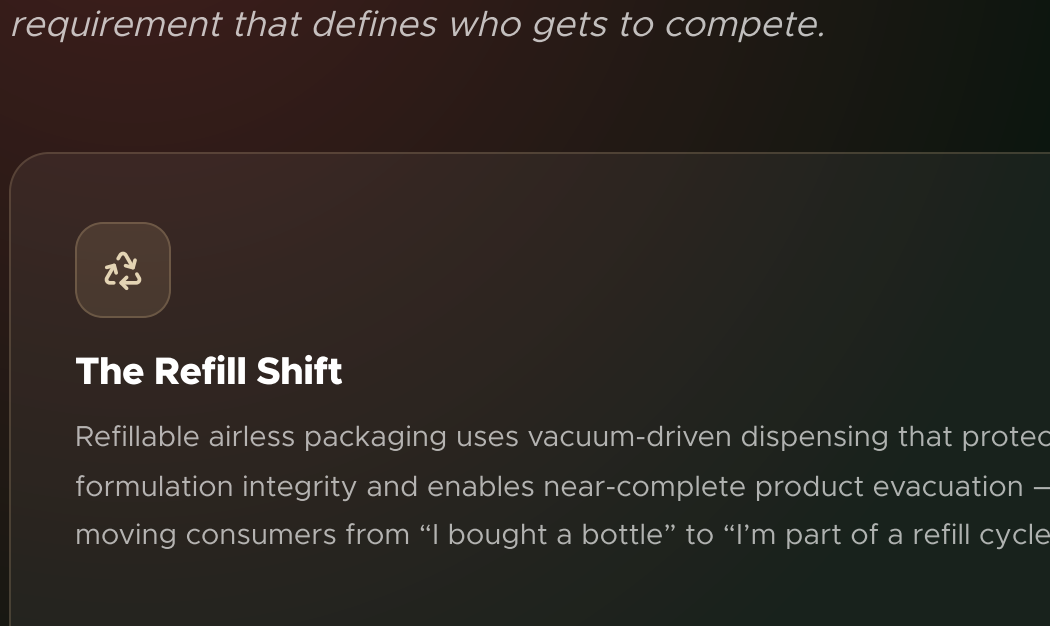
GLOBAL HAIRCARE OPPORTUNITY

**10%+**

NIACINAMIDE IN PREMIUM SKUS

The scalp is now recognized as a living extension of facial skin, where barrier health, microbiome balance, and inflammation control directly influence hair performance and aging outcomes — a convergence of skincare and haircare.

In ASEAN markets like Malaysia, where heat and humidity continuously disrupt scalp equilibrium, demand for skinified hair solutions is accelerating toward long-term biological care.



#### SKIN-FIRST MAKEUP

##### The Hybrid Beauty Revolution

Consumers expect every application to actively improve skin quality while delivering flawless results. Skin-First Makeup brightens, evens tone, refines texture, and supports long-term clarity — powered by advanced actives within stable, comfortable pigment systems.

###### Alpha Arbutin

Reduces the appearance of dark spots and supports a more even complexion.

###### Oligopeptide-68

Targeted brightening by reducing melanin formation and improving tone uniformity.

###### Brightening Complex

A multi-functional system for radiance and reduced pigmentation.

###### Nonapeptide-1

Regulates melanin activity for anti-dark-spot performance and even appearance.

#### 04 WHITE SPACE OPPORTUNITIES

### Capturing Underserved Markets

Translating critical market gaps into immediate, high-margin product lines with clear go-forward strategies.

**01**

##### The Men’s Grooming Gap

The global men’s grooming market is set to reach \$65B by 2026, yet specialized demand outpaces supply. Nearly half of male consumers say products feel too similar. The opportunity: functional minimalism — fewer steps, higher performance.

DEVELOP HIGH-EFFICIENCY HYBRID SKUS →

**02**

##### Urban Defense & Anti-Pollution

Consumers see the visible impact of modern environments — faster dullness, uneven tone, weakened barriers. The new standard is “Urban Defense”: daily skincare that shields from PM2.5, oxidative stress, and digital light. Key reference: Edelweiss extract.

UPGRADE CORE DAILY ESSENTIALS →

**03**

##### Halal-Luxury • Gateway to GCC Growth

The Halal beauty market is set to exceed \$115B, driven by strong GCC demand. The UAE and Saudi Arabia expect high-performance products meeting strict Halal standards — and Malaysia’s globally recognized certification is the strategic launchpad.

BUILD EXPORT-READY GCC PORTFOLIO →

#### WHERE PARTNERSHIP CREATES POSSIBILITY

### From White Space to Shelf-Ready — Faster

#### 05 ESG & PACKAGING TRANSFORMATION

### When Packaging Becomes the First Signal of Trust

In 2026, ESG is no longer a brand narrative — it has become a market-access requirement that defines who gets to compete.



###### The Refill Shift

Refillable airtight packaging uses vacuum-driven dispensing that protects formulation integrity and enables near-complete product evacuation — moving consumers from “I bought a bottle” to “I’m part of a refill cycle.”



###### PCR & Mono-Material Direction

The industry is moving toward simplified, recyclable systems. Polypropylene mono-material structures reduce separation challenges, and Post-Consumer Recycled (PCR) materials are now a baseline expectation, not a premium option.



###### FSC-Certified Secondary Packaging

FSC-certified paper is now standard across many global retail channels. Brands are shifting to reduced-material systems — lighter boards, optimized structures, and simplified finishing that maintain shelf presence.



###### SRG’s Flexible Sourcing

Supplier diversification and flexible sourcing — competitive pricing across multiple packaging suppliers, flexible MOQ structures, and faster adaptation to ESG and retail compliance across regions.

*“The brands that scale globally will not be defined by the most elaborate packaging, but by the most future-ready systems behind it.”*

#### 06 GO-TO-MARKET SHIFTS

### Where Speed, Emotion, and Digital Wins

Consumer behaviour is now shaped by economic pressure, digital transparency, and an uncompromising demand for value intelligence.

#### 01 GEN ALPHA 2010–2024

##### The First Fully Ingredient-Aware Generation

24% of the global population in 2026, with an estimated \$5.5T spending influence by 2029. A science-exposed generation expecting formulations that are safe, barrier-respecting, microbiome-friendly, and emotionally reassuring.

#### 02 SILVER ECONOMY EXTENDED MIDLIFE

##### The Reinvention of Aging into Self-Optimization

Strong purchasing power and a rejection of outdated “anti-aging” narratives. Expectations shift toward neurocosmetic wellbeing, barrier-strengthening formulas, sensory comfort, and long-term resilience.

#### 03 MILLENNIALS 48% OF ONLINE BEAUTY

##### The Seamless Hybrid Shopping Demographic

The dominant force in e-commerce beauty — demanding seamless hybrid experiences and proven clinical efficacy, combining an appetite for premium quality with growing price intelligence.

#### 04 GEN Z SOCIAL-FIRST DISCOVERY

##### The Primary Cultural Influence Engine

The demographic behind “Loud Budgeting” and “Dupe-Plus” — using algorithmic social media to seek high-performance alternatives matching prestige formulations at mass-market prices.

#### ALL DEMOGRAPHICS • A UNIFIED MARKET TRUTH

##### The New Value Equation Has Fundamentally Shifted

Sensory performance and visible efficacy now define trust more than heritage. The new equation: “Effective, enjoyable, and worth repeating.”

**14%**

still associate higher price with higher quality

**67%**

will abandon brand loyalty for better perceived value

**50–70%**

margin architecture via Dupe-Plus strategy

#### LOUD BUDGETING & THE DUPE-PLUS ECONOMY

##### It Is Dupes Is Not Replication — It Is Enhanced Reformulation

Consumers are no longer quietly price-sensitive — they are openly strategic. The modern “dupe” is a value-engineered reconstruction of prestige formulations, designed to match or surpass sensory and clinical performance at an accessible price.

Competitive advantage in 2026 belongs to brands that translate viral prestige demand into superior-value formulations within weeks, not months.

##### Dupe-Plus Advantage Areas

- More stable and photoprotective active systems
- Enhanced sensory texture and application experience
- Stronger barrier support and postbiotic integration
- Improved cost efficiency without losing performance perception
- Speed to market — weeks, not months, via agile OEM ecosystem

#### ONE-STOP OEM • ODM • PRIVATE LABEL

### From Formulation to Finished Product, Under One Roof

#### 07 PARTNER WITH SKY RESOURCES GROUP

### Build What Comes Next in Beauty, Before the Market Moves On

Only brands with the right manufacturing partner will keep pace with scientific innovation, consumer expectation, and regulatory change.



##### High-Performance Formulation

Proprietary actives including DuoAlgae™ and advanced encapsulation, delivering formulations that compete with global prestige at commercially viable prices.



##### Speed to Market

Agile development and rapid benchmarking enable trend-responsive products in weeks — the critical edge in a Loud Budgeting economy where speed is relevance.



##### Halal & Clean Compliance

Malaysia’s globally recognized Halal certification positions SRG as the strategic launchpad for the \$115B+ Halal beauty opportunity and GCC retail networks.



##### ESG-Ready Packaging

Flexible sourcing across airless systems, refillable formats, mono-material PCR options, and FSC-certified secondary packaging for evolving global requirements.



##### ASEAN Market Intelligence

Deep expertise in equatorial-climate formulation, local consumer behaviour, and regional regulation — market intelligence that translates to commercial success.



##### Scalable OEM / Private Label

Full OEM and private label capability from concept to delivery — supporting early-stage SKU development through large-scale commercial production.

## The Window Is Now. Move Before the Market Does.

The 2026 beauty landscape is not evolving slowly — it is resetting fast. Partner with Sky Resources Group to turn scientific and market shifts into scalable commercial success.

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