

# Southeast Asia Halal Cosmetics Market: Current Analysis and Forecast (2025-2033)

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## Abstracts

Halal cosmetics are those products that have been approved by an accredited body as halal in order to ensure the purity, safety and traceability of the product along the value chain. Compliance-related practices include sourcing, formulation, processing, storage, and distribution.

The Southeast Asian Halal Cosmetics market is expected to exhibit a growth rate of 12.50% during the forecast period (2025-2033F). The key factors that have led to market expansion are the high and increasing Muslim population, increased disposable income, and increased awareness of ethical consumption in the region. The use of certification is being formalized by mandated halal rules in some countries, contributing to consumer confidence. Also, the overlap between halal positioning and claims of clean beauty, cruelty-free, and sustainable is extending beyond Muslim consumers. Moreover, the high penetration of e-commerce and mobile-first buying behaviour is boosting accessibility in both urban and semi-urban areas. However, brand switching behaviour and product discovery are further stimulated by youth demographics and social media.

Based on product type, the market is segmented into skin care, hair care, colour cosmetics, fragrance, and personal care. Among these, the skin care market held the largest share in Southeast Asia in 2024, as it is used daily and has a high product replacement rate. Halal-certified cleansers, serums, and moisturisers are among the key personal care products that consumers prefer due to their traditional religious compliance and clean beauty. Moreover, the continuous innovation of products in brightening, anti-acne, and tropical-climate formulations also enhances category growth and the frequency of product purchases. For example, in November 2025, ParagonCorp, the company behind leading halal beauty brands such as Wardah, Emina, and Make Over, officially

launched Light+ by Wardah, a new halal skincare and makeup line born from the aspirations of 1,000 young Indonesians.

Based on the end user, the market is segmented into men, women, and unisex. Among these, the women segment held the dominant share of the Southeast Asia Halal Cosmetics market in 2024. The key demand base is women, the largest consumers of halal cosmetics in Southeast Asia. The rising number of the working population, growing disposable income, and heightened beauty consciousness are driving up its spending on certified skin care and colour cosmetics. Social media and brand loyalty among women consumers would play a significant role in the adoption and successful market penetration in the long run.

Based on the distribution channel, the market is segmented into hypermarkets/supermarkets, specialty beauty retailers, brand-owned stores, online retail, and others. Among these, the online retail segment is expected to grow at a significant CAGR during the forecast period (2025-2033). The online retail is the most rapidly expanding distribution channel that helps halal beauty brands expand regionally with fewer entry barriers. Social commerce ecosystems and e-commerce platforms enhance availability in areas beyond urban centres, enhancing the visibility of the products and price transparency. Direct-to-consumer marketing, influencer partnerships, and digital marketing are driving the growth of customer acquisition and cross-board sales. As per the International Trade Administration, U.S. Department of Commerce, cross-border ecommerce development varies by individual markets within the Asia Pacific region, with China (71.4) scoring the highest in a ranked development index. South Korea (66.7) and Singapore (65.5) are the next-ranked markets on the cross-border ecommerce development index, followed by Japan (61.1), Thailand (58.8), Malaysia (57.7), and Indonesia (54.3).

For a better understanding of the market adoption of the Southeast Asian Halal Cosmetics market, it is analyzed based on its regional presence in Southeast Asia, including Indonesia, Thailand, the Philippines, Vietnam, Malaysia, Singapore, and the Rest of Southeast Asia. Vietnam is expected to grow with a high expected CAGR during the forecast period (2025-2033). Vietnam is a growing market because of the growing disposable income and the growing awareness of products with a halal certification. The market development is accelerating even though the Muslim population is less than in Indonesia, as export-oriented productions of halal goods and regional trade partnerships are

increasing. The access to certified products is enhanced by the rapid e-commerce penetration and trends of beauty promoted by social media. The demographics of urban youth and the increasing popularity of ethical and clean beauty are also encouraging the demand. With the continued growth in halal awareness, ASEAN integration programs continue to be implemented. For example, in October 2024, the Vietnamese Government introduced the National Halal Certification Center (HALCERT) and the Vietnam Halal Standards to promote the Halal economy in the country.

Some major players running in the market include Wardah (PT Paragon Technology and Innovation), PT. Martina Berto, Tbk (Martha Tilaar Group), Safi (Wipro Unza Holdings Ltd.), IVY Beauty Corporation, CLARA INTERNATIONAL BEAUTY GROUP, Sky Resources Sdn. Bhd., SO.LEK Cosmetics, DERMASCIENCE SDN BHD., VNI Scientific Sdn Bhd, GIM Cosmetic.

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