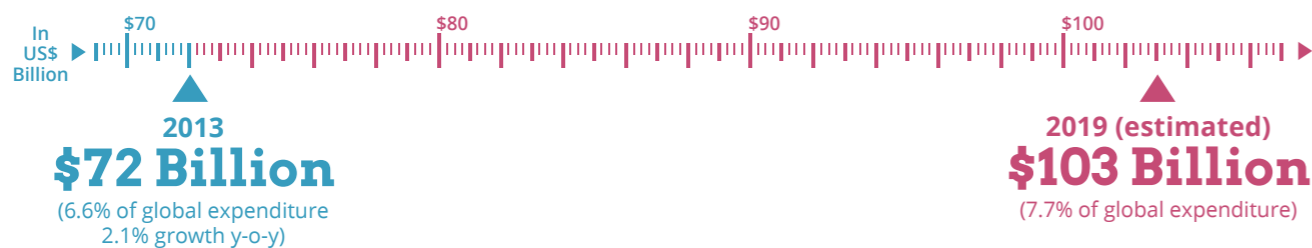




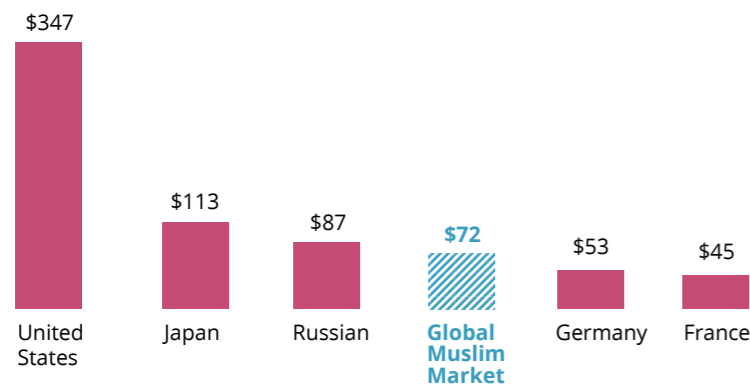
## Market Size for Pharmaceuticals

### How much does global Muslim market spend on pharmaceutical<sup>1</sup>?

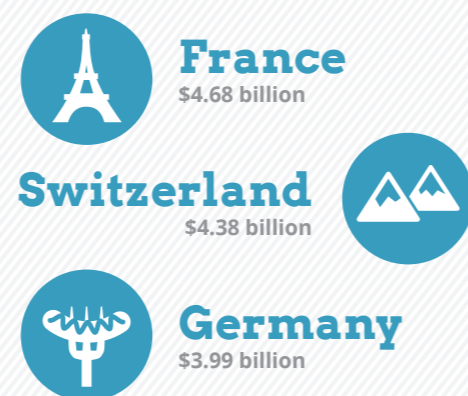


## Benchmark

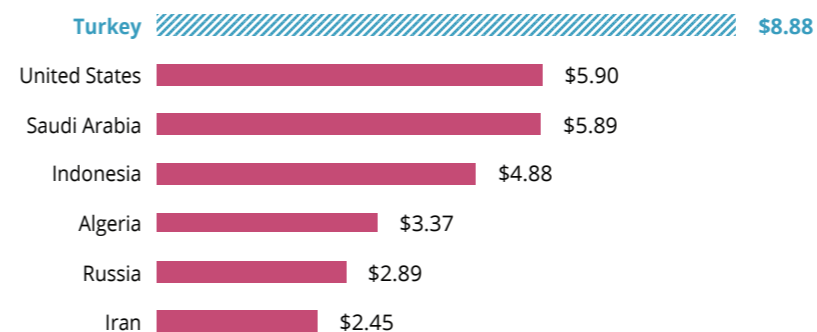
### How does global Muslim market compare to the rest of the world? (in US\$ billion)



### What countries exporting most to OIC countries? (in US\$ million)

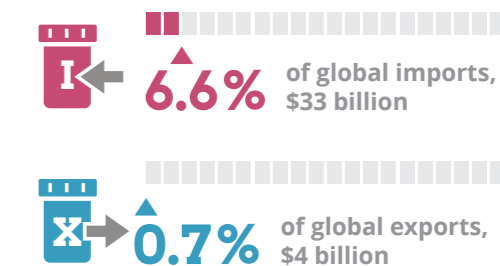


## Top Countries with Muslim Consumer Pharma Expenditure (2013, US\$ Billion)



## Industry Trade Value

### What is the global pharma trade value of OIC<sup>2</sup> countries? (2013 est.)



## The Halal Pharma & Cosmetics Indicator\*

### What countries have the best developed Islamic economy for Pharma & Cosmetics?

#### TOP 10

1. Malaysia
2. Egypt
3. Singapore
4. Pakistan
5. United Arab Emirates
6. Jordan
7. Brunei
8. Indonesia
9. Saudi Arabia
10. Oman

# No.1 Malaysia

\*CRITERIA (From total of 70 select countries)

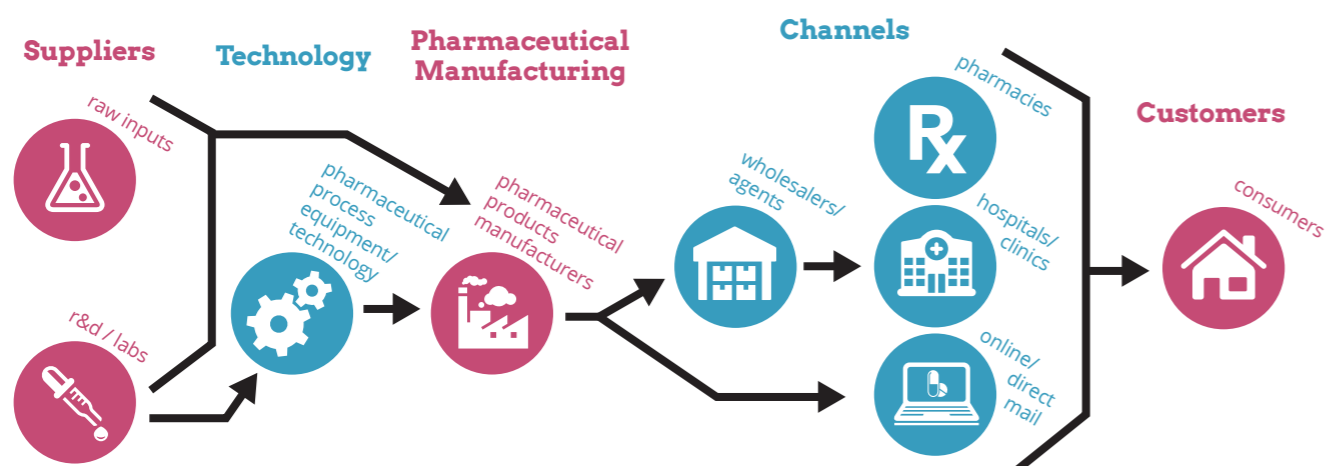
1. Trade	OIC Food Trade Relative to its size	3. Awareness	Media/Events
2. Governance	Regulation/Certification requirements	4. Social	Food Price Index

### Which OIC country have the most export and import value? (in US\$ billion)



TOP IMPORT	TOP EXPORT
2. Saudi Arabia \$4.32	2. Jordan \$0.72
3. UAE \$2.46	3. Indonesia \$0.44
4. Algeria \$2.29	4. Egypt \$0.34

## Value Chain for Pharmaceuticals<sup>2</sup>



**Logistics** Transportation/Freight

**Eco-system** Marketing, Technology, Financial services, Legal, Regulation, Compliance, Training

## Selected Key Players for Pharmaceuticals

### Global Brands

- Pfizer (USA)
- Novartis AG (Switzerland)
- Merck & Co. Inc. (USA)
- Sanofi (France)
- GlaxoSmithKline PLC (UK)

### OIC Based Top Pharma

- Eczacibasi Holdings (Turkey)
- Selçuk Ecza Deposu (Turkey)
- Kalbe Farma (Indonesia)
- Hikma Pharmaceuticals (Jordan)
- CCM Chemicals Sdn Bhd (Malaysia)
- Julphar (UAE)

### Specialty Halal Pharma Companies

- Aj Pharma [Vaccines] (Malaysia/ Saudi Arabia)
- Noor Vitamins (USA)
- Safwa Health (Malaysia)
- BACFO Pharmaceuticals (India)

<sup>1</sup> Expenditure data based on various National Statistics Agencies/ Pharama Industry Associations and UN Comtrade Data, DinarStandard Muslim market estimates & analysis; IMF Outlook Oct 2014 Database for projections

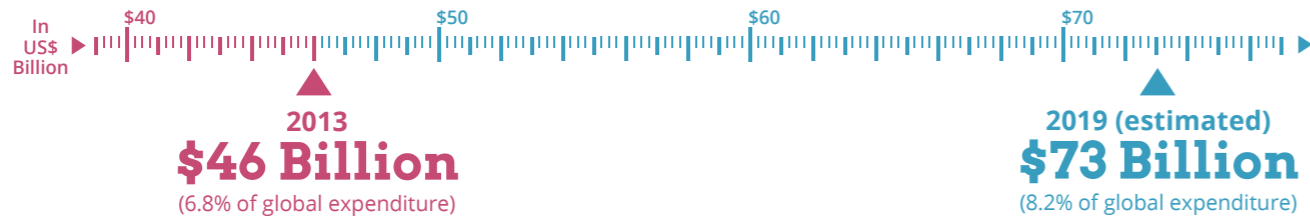
<sup>2</sup> Source: DinarStandard Industry value chains; aligned with International Harmonized Code (HC)

<sup>3</sup> OIC: Organization of Islamic Cooperation (57 member countries)



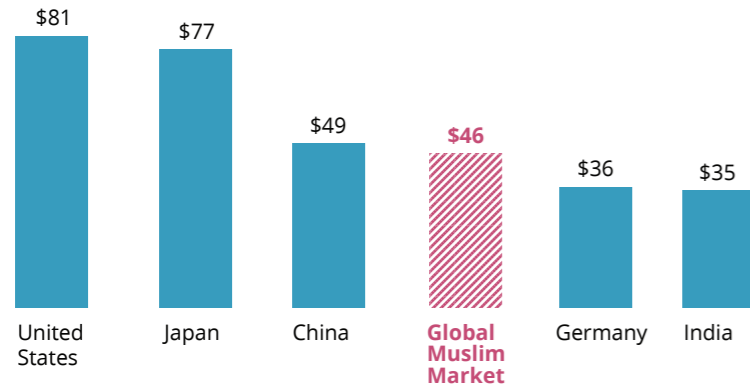
## Market Size for Cosmetics

### How much does global Muslim market spend on personal care/cosmetics<sup>1</sup>?

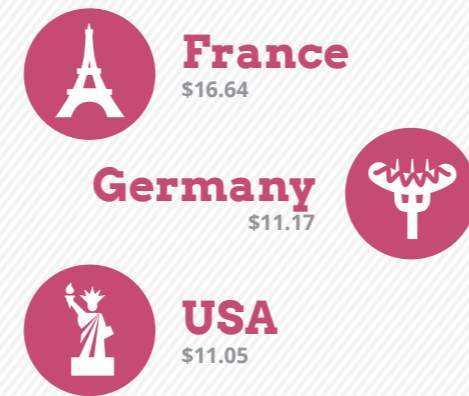


## Benchmark

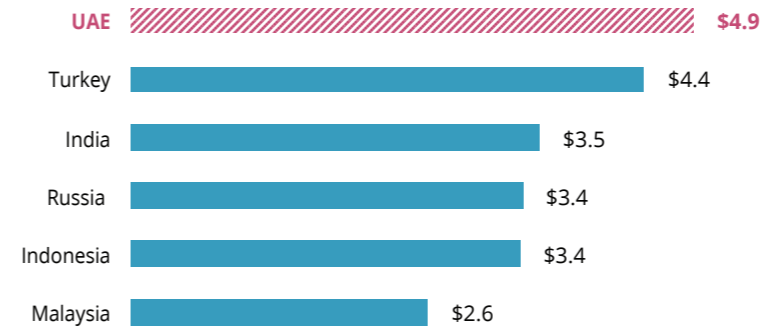
### How does global Muslim market compare to the rest of the world? (in US\$ billion)



### What countries exporting most to OIC<sup>2</sup> countries? (in US\$ billion)

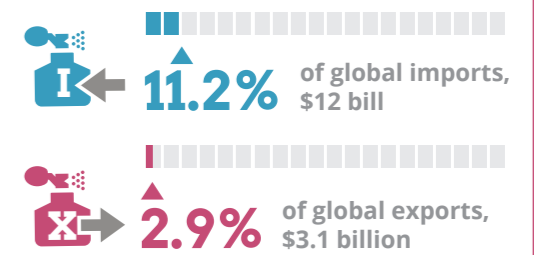


### Top Countries with Muslim Consumer Expenditure (2013, US\$ Billion)

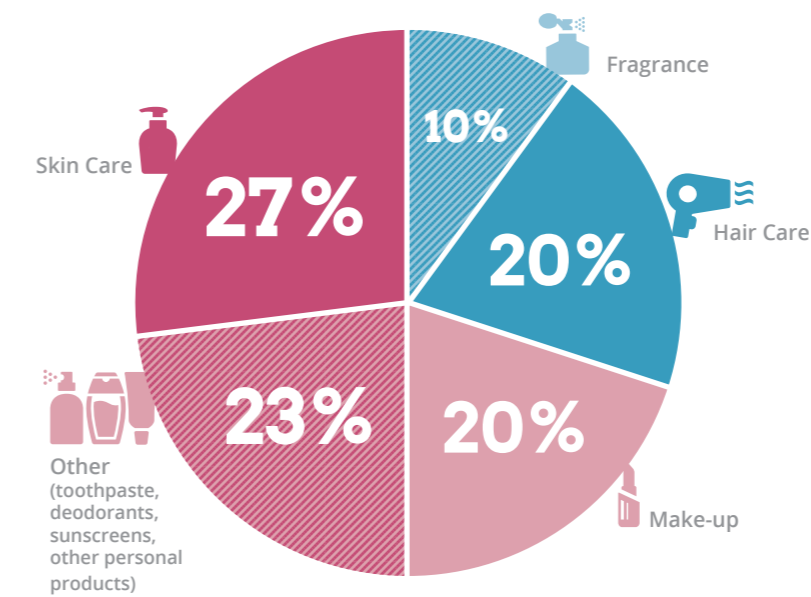


## Industry Trade Value

### What is the cosmetics trade value of OIC countries? (2013 est.)



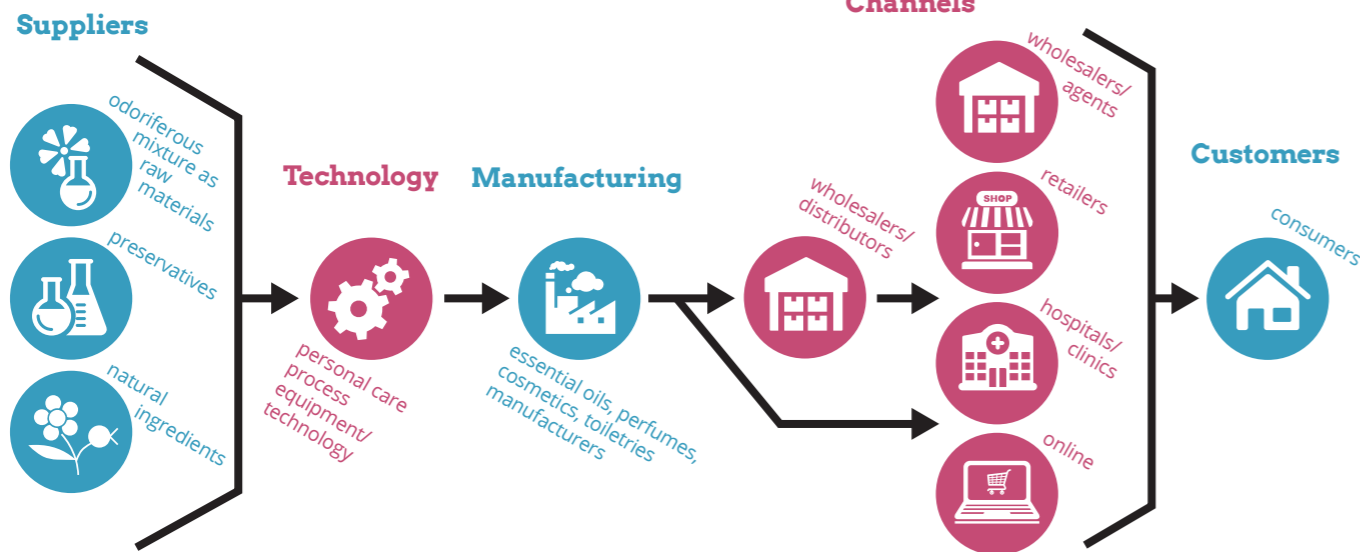
### What is the global personal care/cosmetic segment breakdown<sup>4</sup>?



### Which OIC country have the most export and import value? (in US\$ billion, 2013 est.)

TOP IMPORT	TOP EXPORT
1. UAE \$2.24	1. Turkey \$0.71
2. Saudi Arabia \$1.29	2. Indonesia \$0.60
3. Turkey \$1.14	3. Malaysia \$0.40
4. Indonesia \$1.10	4. UAE \$0.38

## Value Chain for Cosmetics<sup>3</sup>



**Logistics** Transportation/Freight  
**Eco-system** Marketing, Technology, Financial services, Legal, Regulation, Compliance, Training

## Selected Key Players for Cosmetics

### Global Brands

Colgate-Palmolive  
 Avon  
 BASF  
 Procter & Gamble  
 Unilever  
 L'Oreal

### OIC Based Top Personal Care/Cosmetics Products Companies

Farmasi (Turkey)  
 Wardah (Indonesia)  
 Hayat Kimya Sanayi A S (Turkey)  
 Evyap Sabun Yag Gliserin (Turkey)  
 Lam Soon (Malaysia)  
 Mandom (Indonesia)

### Specialty Halal Personal Care/Cosmetic Products Companies

Sunsilk's Clean & Fresh shampoo designed for women who veil their hair  
 Inglot [permeable nail polish]  
**Halal certified cosmetics line**  
 IVY (Malaysia)  
 Saaf Cosmetics (UK)  
 One Pure (UAE)  
 Inika (Australia)

<sup>1</sup> Expenditure data from national industry associations, national statistics agencies, Eurostats and DinarStandard Analysis, DinarStandard Muslim market estimates & analysis; IMF Outlook Oct 2014 Database for projections  
<sup>2</sup> OIC: Organization of Islamic Cooperation (57 member countries)

<sup>3</sup> Source: DinarStandard Industry value chains; aligned with International Harmonized Code (HC)  
<sup>4</sup> ChemistCorner