The Director's Atlas

Sector Outlook



Market size and valuation

- ~US$28-33 bn, 2024/25E
- Beauty and personal-care retail sales
- Quick-commerce and Tier 2/3 growth

Primary economic engine

Beauty e-commerce, rapid delivery, Ayurvedic and derma-skincare, Tier 2/3 demand and affordable premium makeup.

Boardroom Focus

01 **Expand quick-commerce coverage with margin discipline**

02 **Scale domestic formulation research and manufacturing**

03 **Localise ingredients and strengthen INR production**

For Business, Finance and Function Directors:
A starting point for roundtable conversations on growth, resilience and stakeholder alignment.

Transformations Our Programs Deliver

OUR COACH

For Business, Finance and Function Directors

Two outcomes	Foresight to lead through disruption. Influence to align stakeholders before action. Camera confidence, eloquence, vocal gravitas and a six-week peer network.

01 ENTERPRISE RESILIENCE

Foresight → Recognised Strategic Leadership

INSIDE YOUR COMPANY

Be recognised as the director who identifies structural shifts early and turns them into a clear agenda for investment and action.

OUTSIDE YOUR COMPANY

Build a reputation for judgement that clients seek by name, partners trust and competitors benchmark against.

02 STAKEHOLDER ALIGNMENT

Functional Authority → Enterprise-wide Influence

INSIDE YOUR COMPANY

Build a function backed by peers and the C-suite. Articulate ideas with clarity, eloquence and vocal gravitas, with confidence in the room and on camera.

OUTSIDE YOUR COMPANY

Be known for ethical influence and strategic judgement, supported by a trusted peer network built over six weeks.

Five paradigm shifts

What changes the basis of competition

01 Structural

Independent brands → platform and FMCG consolidation.

02 Technology

Store-led supply → dark-store forecasting, shade AI and digital selling.

03 Evidence and trust

Celebrity promises → ingredient evidence and verified reviews.

04 Economics

Sales growth → platform fees, trade spend and local ingredient margins.

05 Socio-cultural

Metro-led beauty → Tier 2/3 demand, inclusive shades and male grooming.

FOR YOUR NEXT LEADERSHIP DISCUSSION

Which of these shifts could change your competitive position - and which is missing from your leadership agenda?

Opportunity & Disruption

Where value can move in cosmetics

01 Market opportunity

Quick-commerce beauty, Ayurvedic formulations, regional voice shopping and inclusive shades.

02 Disruption

Imported-active cost volatility, fulfilment pressure, counterfeits and heat sensitivity.

03 Sector impact

Platform fees and inventory strain margins and cash; counterfeit and heat damage erode trust.

04 Strategic response

Localise active ingredients, build channel-exclusive ranges and enable regional-language shopping.

Opportunity → Disruption → Impact → Strategic Response

Sector Movement

Signals to fund, reshape or leave behind

EVOLVE

Reshape existing lines

Quick-commerce logistics, dermocosmetics, direct-to-consumer platforms and Ayurvedic extracts.

SURGE

Scale emerging lines

Beauty fulfilment hubs, Ayurvedic biotech, inclusive shade ranges and voice shopping.

SHRINK

Reduce exposure

Slow-delivery e-commerce, import-dependent sourcing and uncertified product lines.

SUNSET

Exit structurally weak models

Single-shade ranges, manual supply stores and unsafe skin-lightening formulations.

FOR YOUR NEXT LEADERSHIP DISCUSSION

What should your business fund, reshape or stop - and where does the leadership team disagree?

Governance Agenda

Regulatory and board priorities

01 Regulatory drivers

- CDSCO cosmetics requirements and BIS safety standards
- Legal Metrology packaging and labelling requirements
- DPDP controls for consumer data and digital platforms

02 Board oversight priorities

- Scale quick-commerce coverage with viable unit economics
- Secure local ingredients and domestic formulation capability
- Assure safe formulations, credible claims and data protection

Director's Future Role

Strategy, finance and operations

Strategy

Model channel shifts, Tier 2/3 demand and Ayurvedic or derma brand acquisitions.

Transformation

Rebuild distribution for rapid delivery and connect direct-to-consumer channels.

Finance

Manage channel margins, imported-active currency risk and product profitability.

Risk & Compliance

Assure ingredient safety, accurate labels, credible claims and counterfeit controls.

Operations

Improve micro-fulfilment, domestic supply coordination and packaging speed.

Supply Chain

Localise actives, source heat-stable packaging and replenish dark stores.

FOR YOUR NEXT LEADERSHIP DISCUSSION

Are strategy, finance and operations working from the same assumptions about growth, investment and risk?

Director's Future Role

Commercial, customer and product

Quality & Excellence

Verify heat stability, batch safety, authenticity and delivery accuracy.

Business Development

Win quick-commerce placement and grow Tier 2/3 and Ayurvedic channels.

Sales

Negotiate platform listings and expand regional trade and beauty-advisor sales.

Marketing

Run local campaigns around shade relevance, formula benefits and rapid delivery.

Client Experience

Offer AI beauty advice, shade matching, replenishment and multilingual support.

Product & Technology

Connect retail systems and build regional shopping tools and heat-stable ranges.

Director's Future Role

Data, people and governance

Data & Analytics

Forecast channel demand, shade preferences, counterfeit signals and marketing returns.

Information Security

Secure commerce integrations, loyalty data and product-authentication systems.

People & Culture

Recruit formulation scientists and equip retail and logistics teams for AI tools.

Learning & Development

Train beauty advisors and fulfilment teams in digital tools and product compliance.

Legal

Protect formulations and govern labelling, platform contracts and consumer data.

ESG & Sustainability

Improve packaging, chemical safety and worker protection across plants and fulfilment.

Turn Sector Intelligence into Enterprise Action

For Business, Finance and Function Directors

Which business priority needs clearer direction or stronger support?

EXPLORE ROUNDTABLE THEMES

01 Enterprise Resilience

Turn disruption into growth with a financially grounded resilience roadmap.

02 Enterprise Transformation

Convert strategy into execution, ownership and measurable change.

03 Stakeholder Alignment

Move from functional authority to enterprise-wide influence.

Let others see the capability those closest to you already recognise.

Grow in confidence, express yourself with eloquence, and become more recognised for the value you bring.

REQUEST AN INVITATION

Discuss your priority on WhatsApp

Bring one live business challenge. Let’s explore which roundtable is relevant to your priorities.

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