



**China Cosmetics Market Report,
2010-2011**

Feb. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), Wind, and zghzp.com etc .

Abstract

Benefiting from the accelerated process of urbanization in China as well as the improved disposable income of residents, Chinese consumers have displayed growing demand for beauty & cosmetics. In 2001-2010, the retailing of cosmetics in China increased by five-fold, thus becoming one of the world's largest cosmetics consumer markets; from January to November of 2011, the retail sales climbed 24.5% YoY to RMB99.2 billion.

In 2010, Chinese skincare market size reached RMB64.2 billion, turning into the largest cosmetics market segment. In the same year, retail sales of top ten skincare brands accounted for 38% of the entire skincare market, of which, 80% were foreign brands, while domestic brands merely referred to Chcedo and Herborist. Since 2012, China has cut import tariffs for imported skincare products, which favors multinational cosmetics manufacturers.

Retail Sales and YoY Change of China Cosmetics, 2001-2011 (RMB bn)



Source: National Bureau of Statistics of China

In 2010, Maybelline enjoyed a 10.8% share of Chinese make-up market, a drop from 20% in 2006, mainly because China's local cosmetics brands such as Carslan and Mao Geping have been to some extent competitive with consistent innovation in product, packaging, etc.

As an emerging market segment in recent years, men's skincare market in China reached RMB4 billion in 2010, with industry growth rate at 40% or so, far higher than that of women's.

China Cosmetics Market Report, 2010-2011 by ResearchInChina mainly covers the following s:

※Industry Research: primarily includes scale, competition pattern & features, import & export of China cosmetics industry.

※Channel Analysis: chiefly studies development status, characteristics and trends of department store channel, supermarket, specialty store, online, direct selling, etc..

※Market Segment: covers market status & size, competition features, key players and development trends of five market segments, i.e. skin care, make-ups, perfume, men's cosmetics as well as cosmeceuticals.

※Major Companies: research on 19 major cosmetics enterprises in the Chinese market, such as L'Oréal and Shanghai Jahwa.

As the world's largest cosmetics corporation, L'Oréal realized sales of €19.5 billion in 2010, with 23 international brands outnumbering €50 million. In November 2011, it invested RMB200 million for construction expansion of Tianmei Plant in Yichang city, China, which will achieve capacity of 250 million pieces per year by then to become L'Oréal's largest make-up production base in Asia.

Shanghai Jahwa is a well-known cosmetics producer in China, in 2010, its annual sales registered RMB3.1 billion. Being one of the few high-end cosmetics brands that have access to department store channel, its Herborist brand has been successfully distributed in France, Spain, Netherlands and other markets. Moreover, Shanghai Jahwa has also launched China's first domestic men's skincare brand, namely, Gf.

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