



# China Cosmetic Industry Report, 2013-2016

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## 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 Company Reports, and National Bureau of Statistics of China etc.

## Abstract

Impacted by global economic recovery as well as China's economic growth slowdown, the growth of China cosmetic industry hit a downturn, with the gross retail sales of industrial players above designated scale increasing by 21.5% year-on-year to RMB134.01 billion. At present, foreign brands are still the mainstream in China cosmetic market, with the top three ones coming to LOREAL PARIS, OLAY and Mary Kay which collectively occupy 12.45% of retail sales.

**Retail Sales and YoY Growth in China Cosmetic Market, 2005-2013**



Skin care product is the largest category in China cosmetic market, with the market scale in 2012 hitting RMB 80.48 billion, up 9.9% year-on-year; among skin care products, cream and anti-aging products occupy a lion's share, with the sales standing at above 60% collectively in China skin care product market. As to China's makeup market, it started late but has developed rapidly, with the sales in 2012 grossing RMB23.4 billion, a year-on-year rise of around 20%.

By contrast, the sales of emerging market segments, such as men's cosmetics and children's and infants' cosmetics, still occupy a relatively small share in China cosmetic market by sales. In 2012, China's sales of men's cosmetics stood at less than 5%, while that of children's and infants' skin care products accounted for no more than 5.3%, but the growth was fast.

The report analyzes the scale, import & export, brand and enterprise competition pattern, channel development, market segments (such as skincare products, makeup, etc.) of China cosmetic market, and highlights the operation and cosmetic business performance of four multinational companies and 16 domestic enterprises.

L'Oréal is currently the world's largest cosmetic enterprise. Since its marching into the Chinese market in 1997, L'Oréal has maintained stable business growth in this emerging country. As of late 2012, the company had 20 brands in operation in China, including LOREAL PARIS, Maybelline and other world-renowned ones, with the sales in China growing by 12.4% year-on-year to RMB12.05 billion.

Shanghai Jahwa United Co., Ltd. is a leading homegrown cosmetic enterprise with famous brands including Liushen, Herborist and Maxam. In 2013, the company eliminated four old brands, i.e. Chinfie, Cortry, Ruby and Cocool, and launched three new ones including Giving, Soft Sense and Tea Beauty, a move to realize its all-around strategic layout from middle range to high end, from men/women to infants and children, from department stores, supermarkets and massive circulation to franchise cosmetic stores, network channel and maternal and infant stores.

<b>1. Overview</b>	3.2.2 Development Trend	4.3.2 Competition
1.1 Definition	3.3 Franchise Stores	4.3.3 Import & Export
1.2 Classification	3.3.1 Status Quo	4.3.4 Channel Development
	3.3.2 Ways of Channel Expansion	
<b>2. Development of China Cosmetic Market</b>	3.3.3 Development Trend	<b>5. Other Emerging Market Segments</b>
2.1 Supply	3.4 e-Business	5.1 Men's Cosmetics
2.2 Demand	3.4.1 Market Scale	5.1.1 Market Scale
2.3 Import & Export	3.4.2 Pattern of e-Business	5.1.2 Market Structure
2.3.1 Export	3.4.3 Major e-Businesses	5.1.3 Competition Pattern
2.3.2 Import	3.5 Other Channels	5.1.4 Channel
2.4 Regional Structure	3.5.1 Direct Selling	5.1.5 Market Features
2.5 Competition Pattern	3.5.2 Drugstore	5.2 Cosmeceuticals
2.5.1 Corporate Pattern		5.2.1 Market Status
2.5.2 Brand Pattern	<b>4. Cosmetic Market Segments</b>	5.2.2 Market Structure
2.5.3 Development of Foreign Companies in China	4.1 Skin Care Products	5.2.3 Key Enterprises
2.6 Tariff & Policies	4.1.1 Market Scale	5.2.4 Channel Development
2.7 Development Trend	4.1.2 Market Structure	5.3 Babycare Products
	4.1.3 Competition Pattern	5.3.1 Development Status
<b>3. Cosmetic Market Channel</b>	4.1.4 Popular Skin Care Products	5.3.2 Industry Structure
3.1 Department Stores	4.2 Makeup	5.3.3 Channel
3.1.1 Features	4.2.1 Market Status	
3.1.2 Operation Mode	4.2.2 Brand Pattern	<b>6. Key Cosmetic Enterprises Worldwide</b>
3.1.3 Development Trend	4.2.3 Development Dynamic of Makeup Brands of Multinational Companies	6.1 L'Oréal
3.2 Supermarket	4.2.4 Development Dynamic of Makeup Brands of Local Enterprises	6.1.1 Profile
3.2.1 Status Quo	4.3 Perfume	6.1.2 Operation
3.2.2 Development Trend	4.3.1 Consumption	6.1.3 Revenue Structure
3.3 Franchise Stores		6.1.4 R&D
3.3.1 Status Quo		6.1.5 Cosmetic Business

6.1.6 Development in China	7.1 Shanghai Jahwa United Co., Ltd. (600315)	7.5.4 Brands
6.2 The Estée Lauder Companies Inc.	7.1.1 Profile	7.6 PROYA Company
6.2.1 Profile	7.1.2 Operation	7.7 Tianjin Yumeijing Group
6.2.2 Operation	7.1.3 Revenue Structure	7.8 Shanghai Huayin Commodity Co., Ltd.
6.2.3 Revenue Structure	7.1.4 Gross Margin	7.9 Softto Co., Ltd. (000662)
6.2.4 R&D	7.1.5 Channel	7.9.1 Profile
6.2.5 Marketing Channel	7.1.6 Brand	7.9.2 Operation
6.2.6 Development in China	7.1.7 Development Prospect	7.9.3 Revenue Structure
6.3 Procter & Gamble (P&G)	7.2 Jiangsu LONGLIQI Bio-Science Co., Ltd. (Longrich)	7.9.4 Gross Margin
6.3.1 Profile	7.2.1 Profile	7.9.5 Development Dynamic
6.3.2 Operation	7.2.2 Operation	7.10 Bawang Group
6.3.3 Revenue Structure	7.3 Shanghai Inoherb Cosmetics Co., Ltd.	7.10.1 Profile
6.3.4 Gross Margin	7.3.1 Profile	7.10.2 Operation
6.3.5 R&D	7.3.2 Operation	7.10.3 Revenue Structure
6.3.6 Cosmetic Business	7.3.3 Revenue Structure	7.10.4 Brand
6.3.7 Channel	7.3.4 Gross Margin	7.10.5 Channel
6.3.8 Development in China	7.3.5 Channel	7.10.6 Development Prospect
6.4 Shiseido Company, Limited	7.3.6 Output & Sales Volume	7.11 Guangzhou Huanya Cosmetics Technology Co., Ltd
6.4.1 Profile	7.3.7 Investment	7.12 Beijing Dabao Cosmetics Co., Ltd.
6.4.2 Operation	7.4 JALA Corporation	7.13 Guangdong Marubi Biotechnology Co., Ltd.
6.4.3 Revenue Structure	7.4.1 Profile	7.14 Kose Cosmetics Co., Ltd. (China)
6.4.4 Channel	7.4.2 Channel	7.15 Ganon Biotech (China) Co., Ltd.
6.4.5 R&D	7.5 Zhejiang Osmun Group	7.16 Nivea (Shanghai) Co., Ltd.
6.4.6 Cosmetic Business	7.5.1 Profile	
6.4.7 Development in China	7.5.2 Operation	
<b>7. Main Cosmetic Enterprises in China</b>	7.5.3 Channel Building	

- Classification of Cosmetics
- Gross Industrial Output Value of Chinese Enterprises Above Designated Scale, 2008-2012
- Retail Sales and YoY Growth in China Cosmetic Industry, 2005-2013
- Export Volume/Value in China Cosmetic Industry, 2006-2012
- Import Volume/Value in China Cosmetic Industry, 2006-2012
- Retail Sales in China Cosmetic Industry
- Structure of Chinese Cosmestic Enterprises
- Concentration of China Daily-use Chemicals Market, 2008-2012
- Sales and % of Leading Home-Grown Cosmetic Enterprises, 2012
- Retail Sales and Market Share of Top 8 Brands in China Cosmetic Industry, 2012
- Development of Transnational Cosmetic Enterprises in China
- M&A Cases (International Enterprises' Takeover of Home-Grown Cosmetic Brands), 2003-2013
- Customs Duty Rates of Main Cosmetics in China, 2013
- Policies Regarding Cosmetics in China, 2007-2013
- Gross Retail Sales of Chinese Cosmetic Enterprises above Designated Scale, 2011-2016
- China Cosmetic Market by Marketing Channel
- Channel Distribution of Cosmestics in China by Enterprises/Brand
- Sales of China Cosmetic Market by Channel, 2010/2012
- Channels of Chinese Consumers to Purchase Cosmetics
- Operation Model of Department Store as a Sales Channel for Cosmetics
- Major Cosmetic Franchise Stores in China
- Stages of Multinational Brands Penetrating Franchise Stores, 2003-2013
- Transaction Scale of China Cosmetic Online Shopping Market, 2008-2016
- Cost Structure of Cosmetic e-Businesse in China

- Considerations for Chinese Consumers to Purchase Cosmetics Online
- Network Sales Channels of Cosmetics in China
- Sales of China's Major Cosmetic Direct-Selling Enterprises in China, 2011-2012
- China Cosmetic Market Structure by Retail Sales, 2012
- Market Scale of Skin Care Products in China, 2009-2012
- Sales Structure of China Skin Care Product Market by Product
- Percentage of Skin Whitening Products in China by Category
- Classification of China Mask Market by Price
- Leading Brands in China Facial Mask Market, 2009-2012
- Market Concentration of Top 10 Skin Care Products in China, 2009-2012
- Retail Sales and Market Share of Top 10 Skin Care Brands in China Cosmetic Market, 2012
- Brand Distribution in China Cosmetic Market by Pricing
- Representative Brands of Popular Skin Care Products
- China Makeup Market Scale, 2006-2012
- Makeup Function Awareness for Chinese Consumers, 2013
- Makeup Awareness by Brand in China, 2013Q2
- Brand Awareness of Perfume Cosmetics in China, 2013Q2
- Import Volume/Value of Perfume and Floral Water in China, 2008-2013
- Export Volume/Value of Perfume and Floral Water in China, 2008-2013
- Market Structure of Men's Cosmetics in China
- Awareness of Men's Cosmetics Among Chinese Netizens by Product, 2013Q2
- Brand Pattern of Men's Cosmetics in China
- Brand Awareness of Men's Cosmetics in China, 2013Q2
- Channel Structure of Men's Products
- China Cosmeceutical Market Scale, 2006-2013



- China Cosmeceutical Sales Structure by Sector, 2011
- Chinese Enterprises Involving in Cosmeceuticals Production and Their Products
- Industry Structure of Children's Products
- Proportion of Popular/High-End Children's Products
- Channel Structure of Cosmetics for Children
- Business Structure of L'Oréal, 2012
- Revenue and Net Income of L'Oréal, 2006-2013
- Revenue Breakdown and Percentage of L'Oréal by Business, 2010-2013
- Revenue Breakdown and Percentage of L'Oréal by Region, 2010-2012
- Revenue Structure of L'Oréal by Currency, 2012
- Number of Patents of L'Oréal, 2010-2012
- R&D Costs and % of Total Revenue of L'Oréal, 2008-2013
- Revenue and Operating Profit from Cosmetic Business of L'Oréal, 2009-2013
- Revenue and Percentage of Cosmetic Business of L'Oréal by Division, 2010-2013
- Revenue and Percentage of Cosmetic Business of L'Oréal by Business, 2010-2012
- Revenue and Percentage of Cosmetic Business of L'Oréal by Region, 2010-2013
- Output Structure of Cosmetic Business of L'Oréal by Region, 2012
- Revenue of L'Oréal in China, 2007-2012
- Revenue and Operating Profit of Estée Lauder, FY2006-FY2013
- Net Revenue Breakdown and Percentage of Estée Lauder by Product, FY2007-FY2013
- Revenue of Estée Lauder by Region, FY2007-FY2013
- R&D Costs and % of Total Revenue of Estée Lauder, FY2010-FY2013
- Development of Estée Lauder in China
- Net Revenue and Net Income of P&G, FY2008-FY2013
- Net Revenue Breakdown and Percentage of P&G by Business, FY2011-FY2013

- Net Revenue Structure of P&G by Region, FY2011-FY2013
- Gross Margin of P&G, FY2008-FY2013
- R&D Costs and % of Total Revenue of P&G, FY2008-FY2013
- Classification and Brands of Cosmetic Business of P&G
- Net Revenue and Net Income of P&G from Cosmetic Business, FY2010-FY2013
- Brand Distribution of P&G in China
- Net Revenue and Net Income of SHISEIDO, FY2007-FY2013
- Revenue Breakdown and Percentage of SHISEIDO by Product, FY2010-FY2013
- Net Revenue of SHISEIDO by Region, FY2008-FY2013
- Overseas Revenue and Percentage of SHISEIDO, FY2008-FY2013
- Marketing Channel of SHISEIDO in Japan
- Channel Distribution of SHISEIDO by Brand, FY2013
- R&D Costs and % of Total Revenue of SHISEIDO, FY2008-FY2012
- R&D Bases of SHISEIDO by Country
- Cosmetic Business Segments of SHISEIDO
- Distribution of SHISEIDO by Country
- Net Revenue of SHISEIDO in China, 2010-2012
- Subsidiaries of SHISEIDO in China, FY2013
- Revenue and Net Income of Shanghai Jahwa United, 2008-2013
- Revenue of Shanghai Jahwa United by Sector, 2008-2013
- Revenue of Shanghai Jahwa United by Region, 2008-2013
- Gross Margin of Shanghai Jahwa United by Sector, 2008-2013
- Positioning and Marketing Channel of Shanghai Jahwa United by Brand
- Sales of Shanghai Jahwa United by Brand, 2010
- Sales and Gross Margin of Shanghai Jahwa United by Brand, 2010

- Brands under Shanghai Jahwa United
- Pricing of Major Brands under Shanghai Jahwa United
- Market Share of Liushen Bath Series, 2001-2009
- Market Share of Hand Care Products of Maxam, 2001-2009
- Products under the Brand of Herborist
- Revenue and Net Income of Shanghai Jahwa United, 2011-2016
- Brands under Longliqi
- Development of Longliqi, 2002-2013
- Worldwide R&D Bases of Longliqi
- Operating Revenue of Longliqi, 2007-2012
- Revenue and Net Income of Shanghai Inoherb Cosmetics, 2009-2012
- Revenue Breakdown and Percentage of Shanghai Inoherb Cosmetics by Product, 2009-2012
- Revenue of Shanghai Inoherb Cosmetics by Region, 2009-2012
- Gross Margin of Shanghai Inoherb Cosmetics by Product
- Revenue Structure of Shanghai Inoherb Cosmetics by Channel, 2011
- Channel Models and Sales Terminals of Shanghai Inoherb Cosmetics's Products
- Production Capacity of Shanghai Inoherb Cosmetics by Plant, 2009-2011
- Output and Sales Volume of Shanghai Inoherb Cosmetics by Product, 2009-2011
- Production Bases of JALA Corporation
- Sales of Zhejiang Osmun Group, 2010-2012
- Revenue of Tianjin Yumeijing Group, 2007-2012
- Operating Revenue of Shanghai Huayin Commodity, 2007-2009
- Revenue and Net Income of Softto, 2008-2013
- Revenue of Softto by Product, 2008-2013

- Revenue of Softto by Region, 2008-2013
- Gross Margin of Softto by Product, 2008-2013
- Revenue and Net Income of Bawang Group, 2008-2013
- Revenue Breakdown and Percentage of Bawang Group by Product, 2010-2013
- Revenue Breakdown and Percentage of Bawang Group by Region, 2011-2012
- Distribution of Bawang Group by Brand
- Revenue Breakdown and Percentage of Bawang Group by Brand, 2010-2013
- Channel Distribution of Bawang Group by Brand, as of Jun.2013
- Development Target of Bawang Group
- Operating Revenue of Guangzhou Huanya Cosmetics Technology, 2008-2009
- Fundraising and Investment Projects of Marubi, Apr.2013
- Brand Distribution of Kose Cosmetics by Channel
- Operating Revenue of Kose Cosmetics, 2007-2010

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