

China Cosmetic Industry Report, 2013-2016

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The Vertical Portal for China Business Intelligence

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 costeffective 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

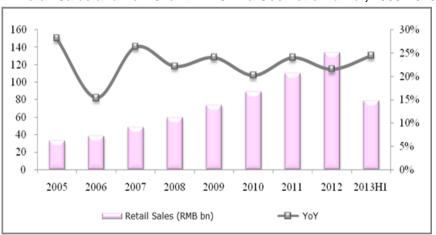
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

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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

Source: NBS; ResearchInChina China Cosmetic Industry Report, 2013-2016

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.

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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.

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