China Cosmetics Market Report, 2019-2025

May 2019

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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.

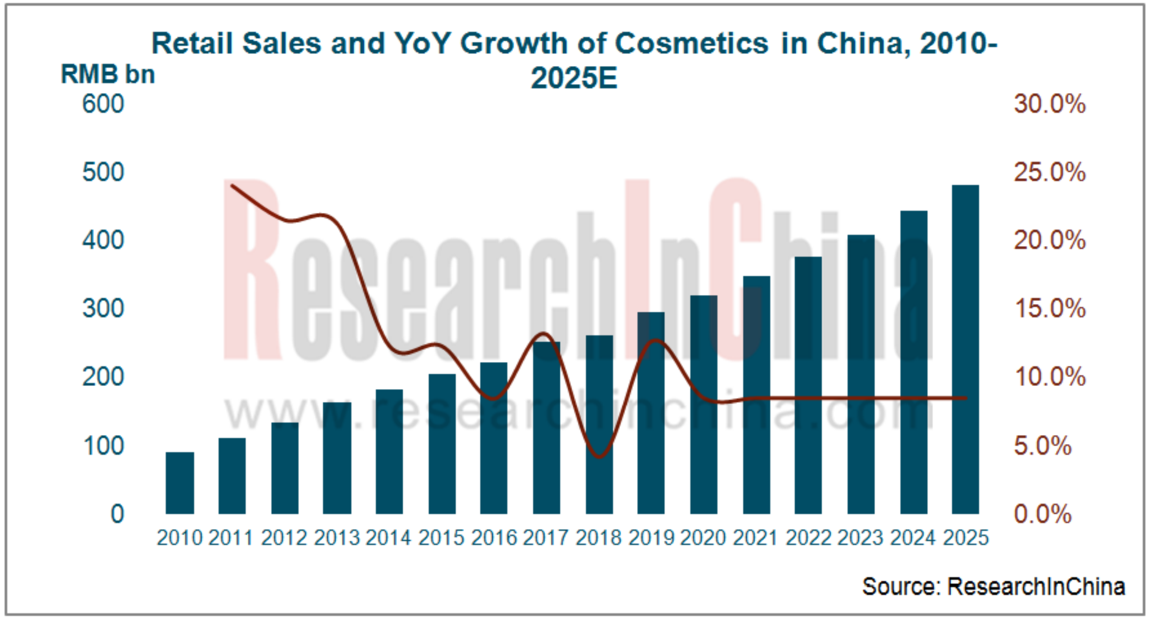
INFORMATION SOURCES

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

Abstract

China has already been the world's second largest cosmetics consumer market only behind the United States, with the retail sales rising by 4.2% year on year to RMB261.9 billion in 2018. Spurred by urbanization, people's higher income and mature consumer education, the cosmetics market size is expected to surge from RMB361.6 billion in 2017 to RMB62.61 billion in 2022, showing an AAGR of 8.16%.

Chinese cosmetics market witnesses the burgeoning online sales. The penetration rate of online cosmetics has been on a rapid rise in China since 2009, hitting 25.3% in 2018, far above the levels of UK (12.1%), the United States (10.9%) and Japan (9.2%). China's online penetration rate of cosmetics will range at 31.4% in 2022.



Online: The retail sales of cosmetics at Alibaba have grown apace, with fluctuations in recent months. Chinese brands have performed differently. Thanks to the industry's prosperity and fast e-commerce penetration, the retail sales of cosmetics at Alibaba swelled by 44.87% in November and 50.54% in December 2018, and 39.55% in January 2019. Compared with December 2018, the growth slowed down in January 2019, perhaps because the Spring Festival arrived earlier than the previous year. International brands and new Chinese brands made outstanding performance, while traditional domestic brands performed at varying levels.

Import: The high-end trend is apparent and China's import of cosmetics maintains fast growth. The imported cosmetics took a nosedive for the first time in November 2018, but resumed growth in December 2018. Amid the high-end trend of cosmetics consumption at home, the import value of cosmetics in China grew at a compound annual rate of 30% between 2008 and 2017; the monthly growth rate was over 50% in January-September 2018, but it stood at 16.84% in November and 37.98% in December.

From the perspective of Chinese cosmetics consumers, people born in 1970s-1990s are the leading force whose consumption accounts for nearly 90%, of which nearly 40% is contributed by those born in 1980s. In addition to traditional gifts such as flowers and chocolates, “imported cosmetics”, especially lipsticks, have become a new option for gifts, with the sales volume soaring by 76.5% year on year.

In recent years, people born between 1995 and 2000s have the growing demand for cosmetics as they enter colleges, universities and the society. Compared with other age groups, they are featured as follows: 1) They are keen on online shopping with changing demand, diversified brand preference and focus on both high-end and affordable brands. 2) They are brought up in Chinese and foreign cultural turmoil, but they have more confidence in Chinese culture; 3) Amid the prevailing fandom and participatory culture, they like to try cyberstar products and new products. Changes in demographics, consumption upgrades, skin care and makeup habits will be crucial to the future Chinese cosmetics market.

So far, foreign-funded enterprises still play a dominant role in China's cosmetics market, an 86% share of the total retail sales. To cater to the demand of Chinese cosmetics consumers and gain more market shares in the China, L'Oreal, Estee Lauder, Procter & Gamble, Shiseido and other foreign companies have constantly adjusted brand strategies and intensified the building of channels. Meanwhile, Chinese companies led by Jahwa and Marubi are also stepping up the layout of cosmetics market.

Japanese, Korean, European and American brands have long dominated the cosmetics market in China. In 2017, only 3 Chinese brands ranked among the top ten cosmetics brands in China, namely Shanghai CHICMAX (sub-brands: KANS, One leaf, etc.), Shanghai Pechoin (sub-brands: Pechoin, Sansen, etc.) and JALA Corporation (sub-brands: CHANDO, MAYSU, etc.), while the rest were foreign brands.

Among listed companies, Shanghai Jahwa occupied the 11th place in Chinese cosmetics market with a market share of 1.9%, followed by PROYA with 1.0% and Yujiahui with about 0.5%.

The report highlights the following:
●China's cosmetics market size, import and export, product structure, channel structure, regional structure, tariff policy, etc.;
●Development status, market size and development trend of major cosmetics channels e.g. department store, supermarket, franchised store, e-commerce, direct marketing;
●Market size, competition pattern, channel development of major cosmetics segments e.g. skin care, make-ups, perfume, men's cosmetics, infant & child care products;
● 5 global cosmetics companies (operation, development in China);
●12 Chinese cosmetics companies (operation, development strategy, etc.).

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Room 801, B1, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com

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