KANTAR WORLDPANEL

a CTR service in China

探索未来增长新耀能

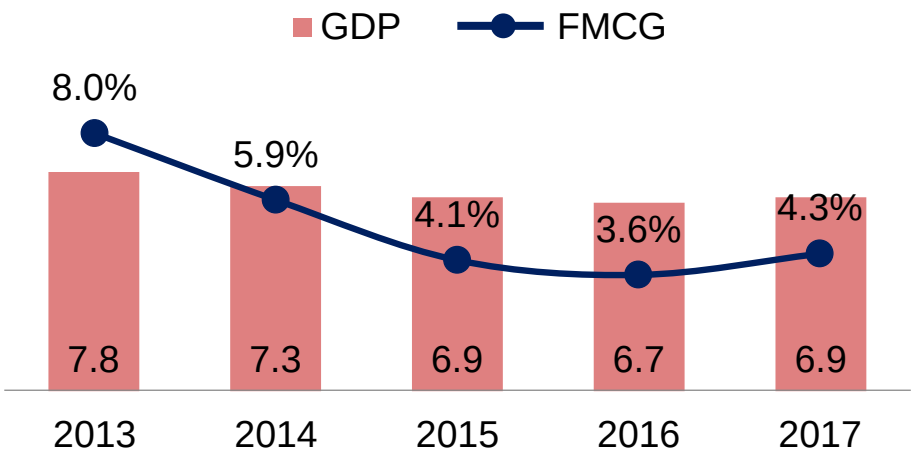
Finding new shoppers in China beauty market's untapped potentials

快消品市场回暖，高端化为主要增长动力

China FMCG slightly warmed up, accelerated by a stronger premiumization trend.

国内生产总值及快消品销额增长率

GDP & FMCG Value GR



增长动力

Market Driver

购物篮增长停滞
Sluggish Basket Size (KG)
-1.3%

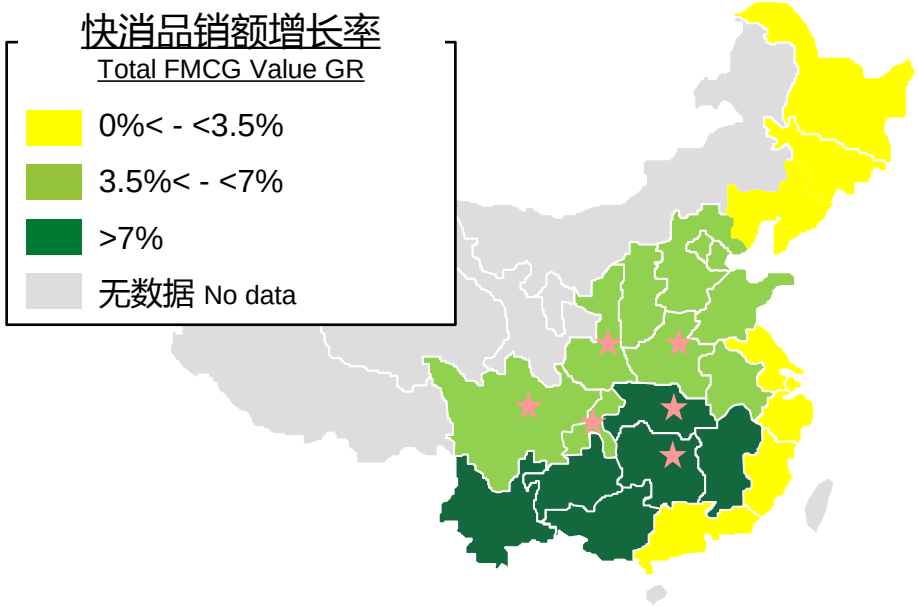
购物频次减少
Decreasing Frequency
-1.8%

持续高端化
Continuous Trade-up
+4.0%

*数据来源：凯度消费者指数 家庭购买样组；全国城镇家庭；Y17 vs YA
Data source: Kantar Worldpanel Household Panel; TTL Urban China families

中国快消品增长转向中、西部以及二、三线城市领导

Growth engine of China FMCG has shifted to Southwestern and Central provinces, as well as mid-tier cities.



城市级别 City Tier		增长率 GR
一线城市	Key Cities	+3.5%
二线城市	A Cities	**+4.8%**
三线城市	B Cities	**+4.4%**
四/五线城市	C/D Cities	+3.9%

★人才落户和购房优惠政策

Preferred housing and Hukou policies

*数据来源：凯度消费者指数 家庭购买样组；全国城镇家庭； Y17 vs YA

Data source: Kantar Worldpanel Household Panel; TTL Urban China families

个护品类保持高速增长，护肤和彩妆是最大机会

Personal care sector remained outstanding performance; Skin care and Makeup are the biggest opportunities.

*个护品类包括护肤、彩妆、香水、洗发护发、脱毛产品、沐浴产品、私密护理
Personal Care incl. Skin care, Makeup, Fragrance, Hair Care, Hair Remover, Personal Wash, Female care

*数据来源：凯度消费者指数 个人美妆样组；全国城镇人口；15~54岁男女性； Y17 vs YA
Data source: Kantar Worldpanel Beauty Panel; TTL Urban China; 15~54 y.o.

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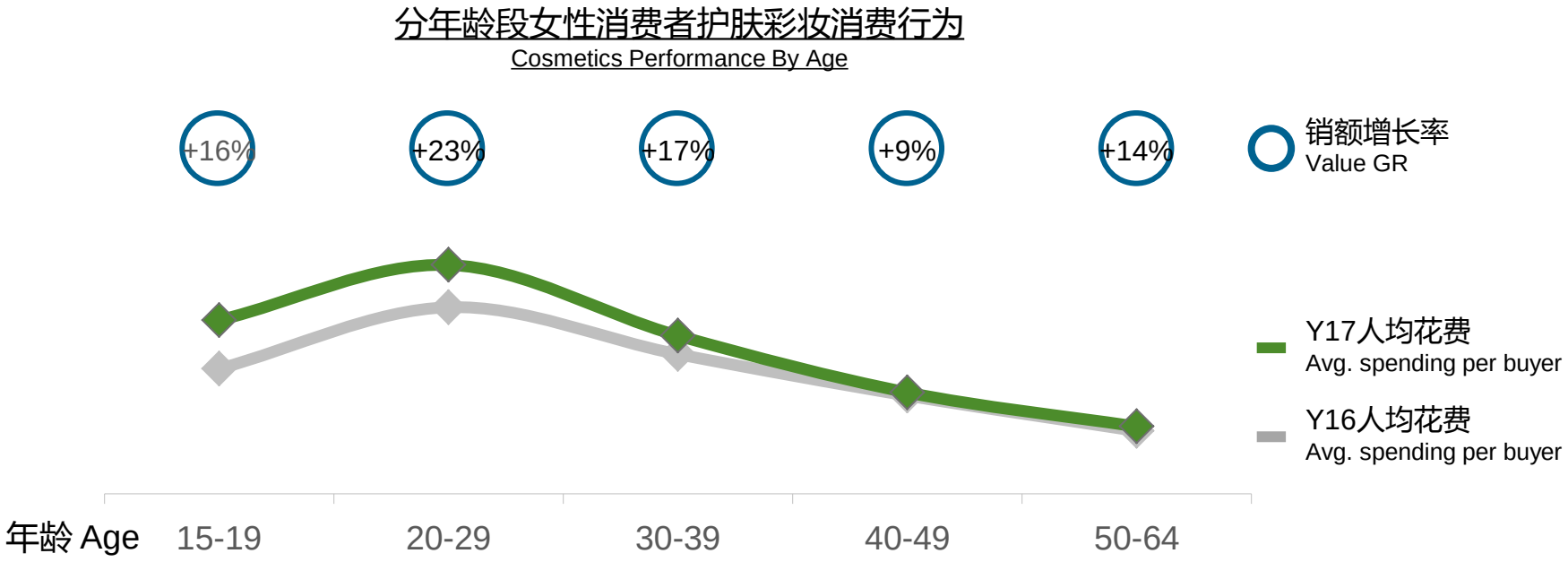
CHINA BEAUTY FORESIGH
中国化妆品市场年会

寻找新消费者

FINDING NEW SHOPPERS

20多岁女性消费者是市场领导者

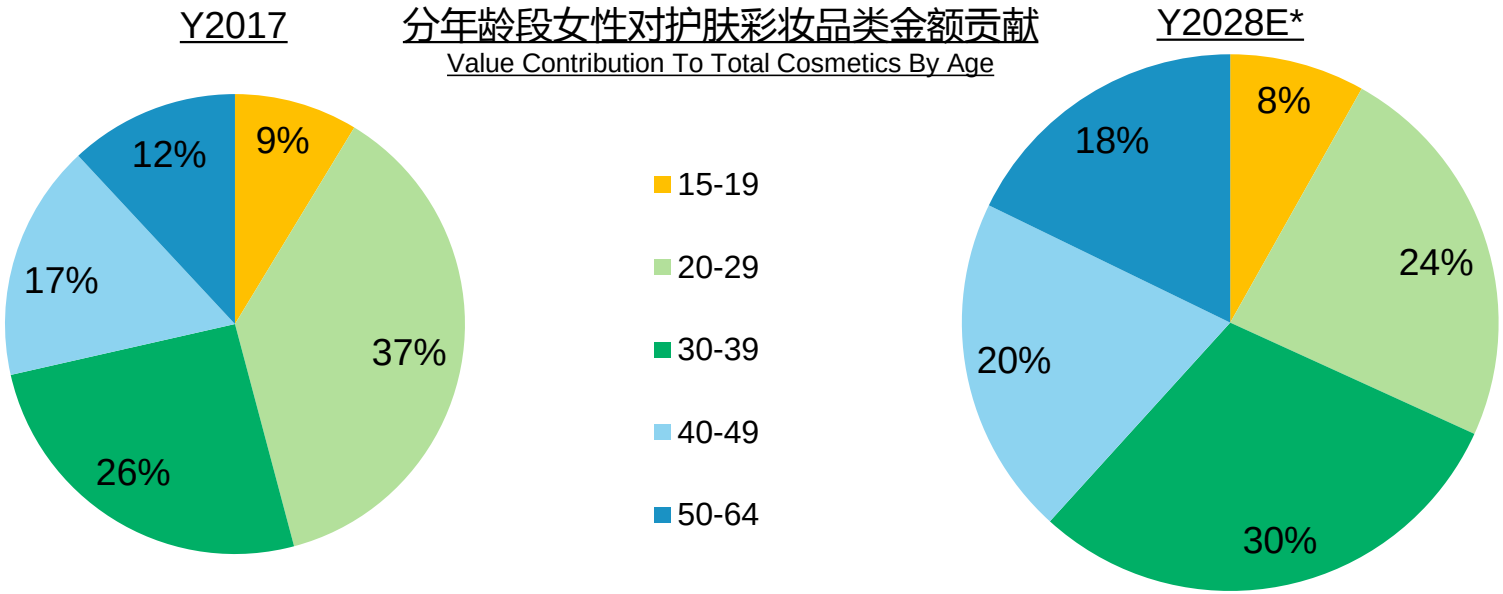
Young females in their 20's are the market leader and growth driver.



*数据来源：凯度消费者指数 个人美妆样组；全国城镇人口；15~64岁女性； Y17 vs YA
Data source: Kantar Worldpanel Beauty Panel; TTL Urban China; Female 15~64 y.o

预测10年后，30岁以上女性市场将占主流，品牌须早做准备

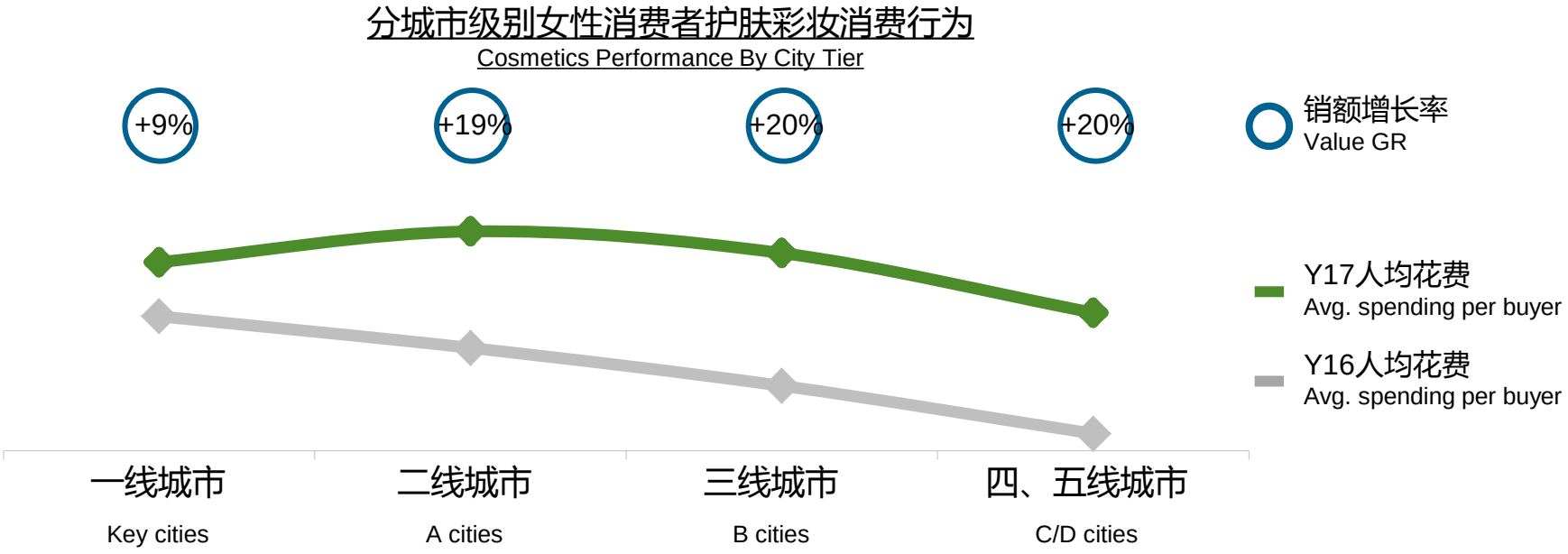
In 10 years' time, the importance of 30+ females will increase for Cosmetics market.
Pre-empting their needs in innovations help win the future.



*数据来源：根据国家统计局数据，凯度消费者指数统计团队预测
Data source: Kantar Worldpanel prediction based on National Statistics data

下线城市增长迅猛，二、三线城市消费力已赶超一线

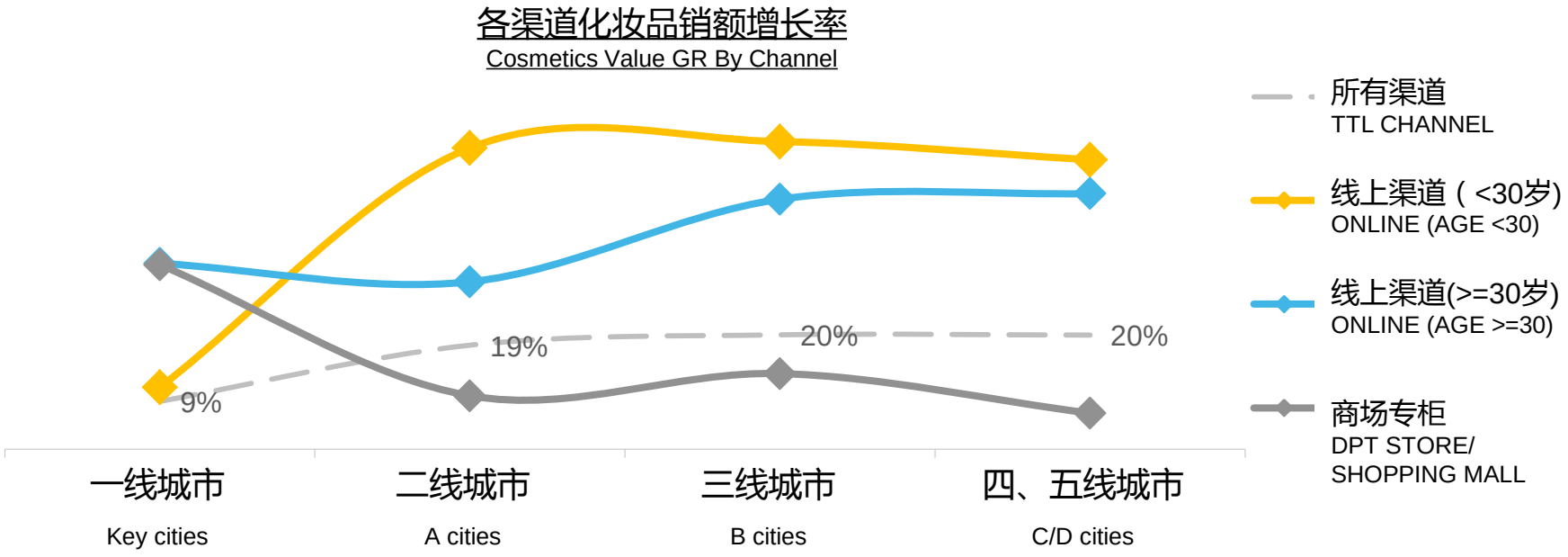
Lower tier cities experienced a major boom of consumer spending; mid-tier (A+B) cities have exceeded Key cities in cosmetics spending power.



*数据来源：凯度消费者指数 个人美妆样组；全国城镇人口；15~54岁女性； Y17 vs YA
Data source: Kantar Worldpanel Beauty Panel; TTL Urban China; Female 15~54 y.o

一线转战商场专柜，二线以下城市仍享受线上高速增长红利

A cities and below tiers are still riding on E-commerce boom; while a strong surge happens in Dept. Store/ Shopping Mall in Key cities.



*数据来源：凯度消费者指数 个人美妆样组；全国城镇人口；15~54岁女性； Y17 vs YA
Data source: Kantar Worldpanel Beauty Panel; TTL Urban China; Female 15~54 y.o

年轻消费者在各APP中种草拔草，形成多次少量的购买习惯

M-commerce & content APPs adding on purchase window or link, create numerous instant purchase occasions that shape the small frequent trips purchase pattern of young females

微信小程序提供更多玩法

Wechat Applet offers various interaction with consumers

微博与天猫/淘宝打通，种草一键购买

Weibo links directly to Tmall/Taobao store

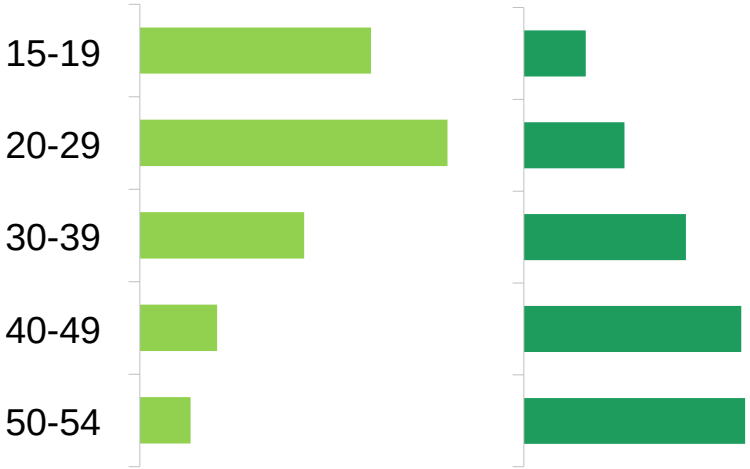
视频直播APP

Video&Live stream

美妆社群APP

Beauty community

网购消费行为 Online Purchase Behavior



*数据来源：凯度消费者指数 个人美妆样组；全国城镇人口；15~54岁女性； Y17
data source: Kantar Worldpanel Beauty Panel; TTL Urban China; Female 15~54 y.o

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发现新趋势

FINDING NEW TRENDS

如今消费者对于护肤彩妆有更多诉求

Consumers have developed new pursuits for beauty products

护肤彩妆诉求
Pursuit in beauty products

更健康的肌肤
Healthier skin

由追求去皱、美白、祛痘转向加强健康肌肤状态
Function shifting from wrinkle, whitening, acne to an overall healthy skin condition

更专业的产品
More professional products

对化妆品了解增加，自主选择更专业的产品
Choose more professional products with increasing knowledge

更个性的妆扮
More personality

用香味和大胆的彩妆颜色来展现个性
Show personality through use of fragrant products and bold makeup colors

更健康的肌肤：调节肌肤状态的需求使传统功能定义变模糊

Healthier skin: pursuit of healthy skin condition is blurring the definitions of traditional functions

抗衰老新定义 NEW anti-age

修护肌肤屏障

Repairing skin barrier

本土品牌
Local Brand

玉泽
Dr.Yu

控油新定义 NEW oil control

改善水油平衡

Improving water-oil balance

日本三大平衡爽肤水
Best selling Japanese balancing toner

本土品牌
Local Brand

佰草集
HERBORIST

美白新定义 NEW whitening

肌肤光泽透亮

Healthy glowing skin

使用护肤品原因 Y17 vs Y15
Usage Reason

-20%
美白皮肤
Whiten my skin

+6%
使肌肤焕发光彩
Give skin a glow

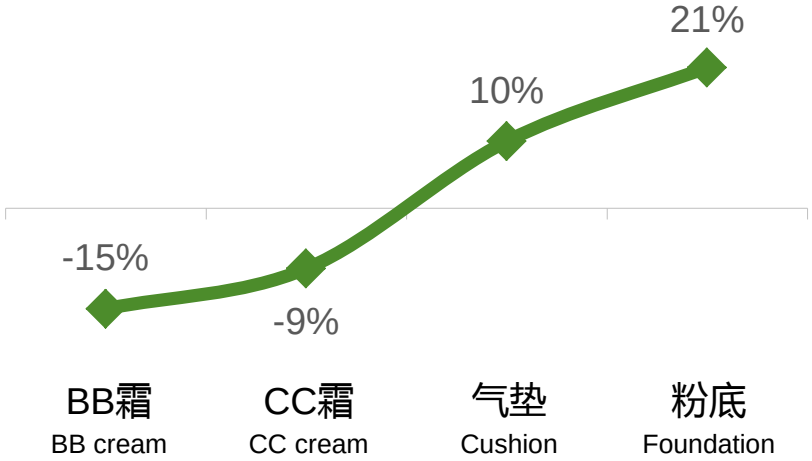
*数据来源：凯度消费者指数 个人美妆样组；全国城镇人口；15~54岁女性； Y17 vs YA
Data source: Kantar Worldpanel Beauty Panel; TTL Urban China; Female 15~54 y.o
凯度消费者指数 个护使用样组；一、二线城市；13~55岁女性
Kantar Worldpanel Personal Care Usage Panel; Key+A cities; Female 13~55 y.o

更专业的产品：专业底妆击败便利易用，步骤完善打造无暇妆效

More professional products: base makeup shifting from easy and convenient to professional, adding on pre and post steps for a flawless look

底妆产品类型渗透率增长

Penetration GR Of Base Face Makeup Types



完整底妆步骤 Complete Face Makeup Steps

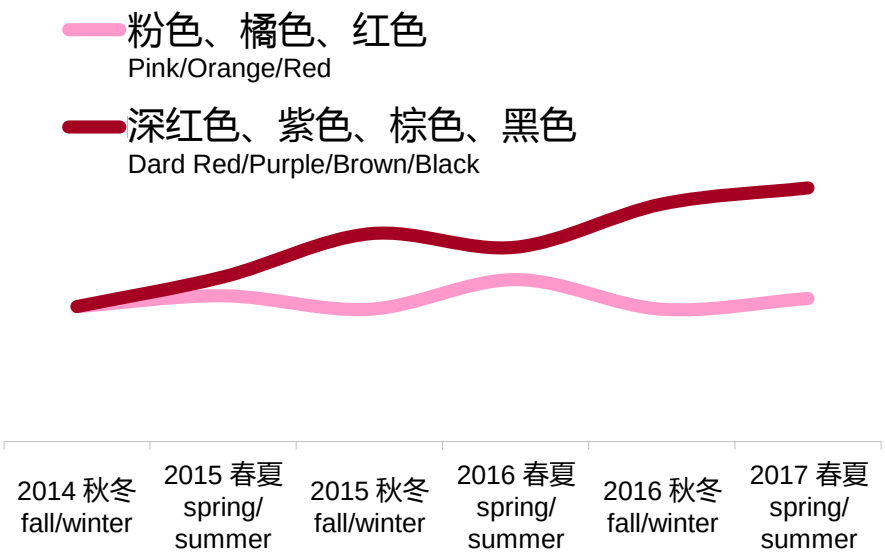
隔离/妆前 MB/Primer | 粉底 Foundation | 遮瑕 Concealer | 粉 Powder

*数据来源：凯度消费者指数 个人美妆样组；全国城镇人口；15~54岁女性； Y17 vs YA
Data source: Kantar Worldpanel Beauty Panel; TTL Urban China; Female 15~54 y.o

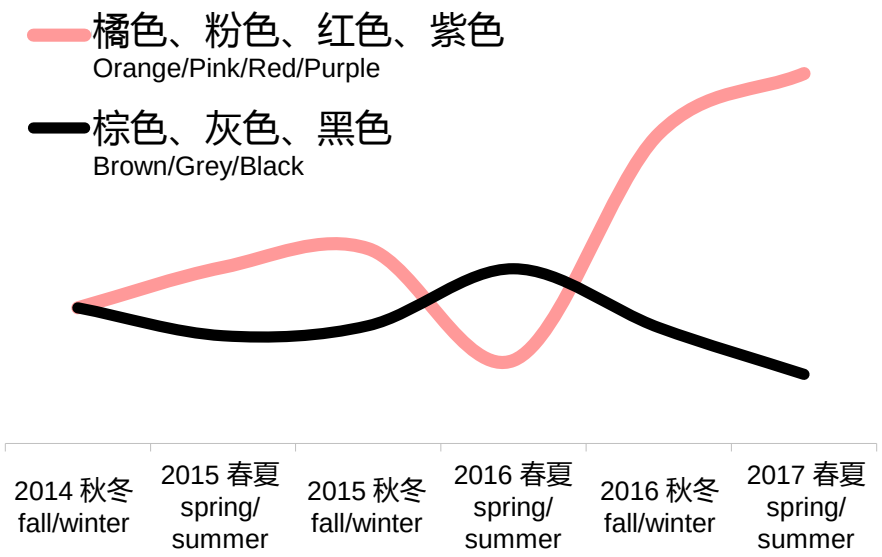
更个性的妆扮：唇妆、眼妆色彩更大胆出挑

More personality: lip and eye makeup color brighter and bolder

唇妆颜色使用场合占比指数* Lip colors occasion% index*



眼影颜色使用场合占比指数* Eye shadow colors occasion% index*



*指数计算方式：当期占比/14年秋冬占比*100

Index calculation: occasion share of the period/of 14 fall/winter *100

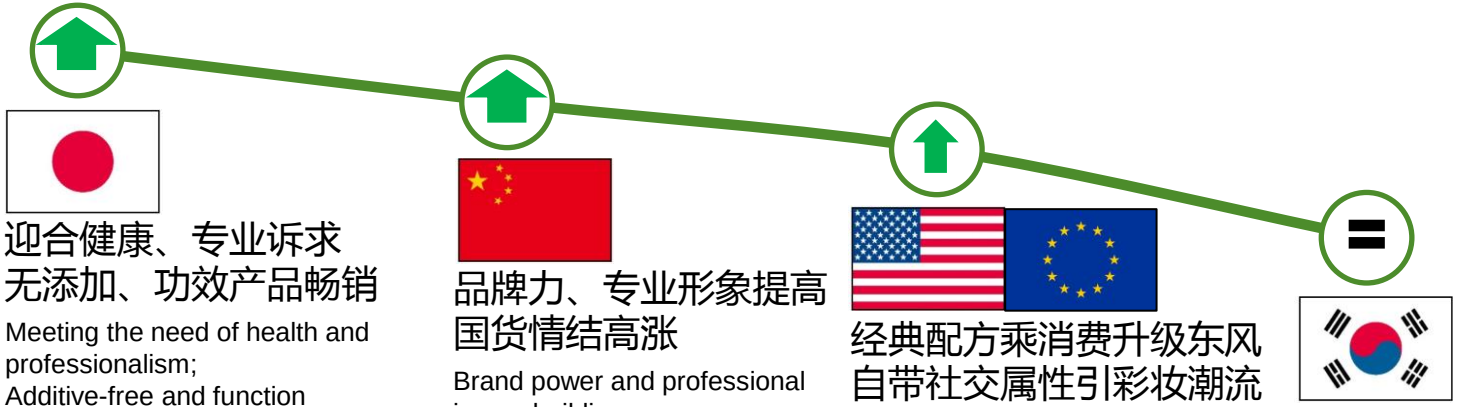
*数据来源：凯度消费者指数 个护使用样组；一、二线城市；13~55岁女性

Kantar Worldpanel Personal Care Usage Panel; Key+A cities; Female 13~55 y.o

各国化妆品品牌在新趋势中，各自发扬优势撩动新消费者

Brands of all origins can attract new shoppers with their unique strengths in the new trends

分国籍化妆品品牌销额增长率 Value GR Of Cosmetics By Brand Nationality



迎合健康、专业诉求
无添加、功效产品畅销

Meeting the need of health and professionalism;
Additive-free and function specialty leading

品牌力、专业形象提高
国货情结高涨

Brand power and professional image building up;
'National sentiment' booming

经典配方乘消费升级东风
自带社交属性引彩妆潮流

Signature formula riding on premiumization;
Luxury makeup setting the aspiring trend

紧抓下线城市、网络渠道
打造快美妆爆款

Boost lower tier and online channels;
Expand with fast beauty hit products

探索未来增长新耀能三大关键字

3 key words for finding new shoppers in China beauty market's untapped potentials

快搭流行列车、引爆自身优势 SWIFT on trends, leverage own strengths: 从消费者未满足的需求出发，重新审视传统功能划分的局限性，打造品牌的专业形象，提供个性化产品。 Review function definitions from consumers' unmet needs; capture the sophistication and personalization trends in building products and brands.

准确把握接触点、锁定转化时机 PRECISE touch point, lock conversion timing: 掌握消费者截然不同的购物模式， 精准的时机和媒介投放增加品牌转化。 Learn the different shopping patterns and trigger points, timely match the right mix of (content) media touch points to capture the ever more fragmented purchase occasions.

备战未来、开展目标人群和渠道 PREEMPT the future, expand targets & distribution: 打破过度开发年轻人和一线城市的思维，下一波进军中(老)年群体和二三线城市。 Explore the soaring consumption power of mid-tier cities and anticipate the future demands from an aging society.