Beauty

Decode 美丽 解码

美丽新纪元
New Beauty Era

Vincent Shao | Ashley Kang

化妆品市场趋势与变革

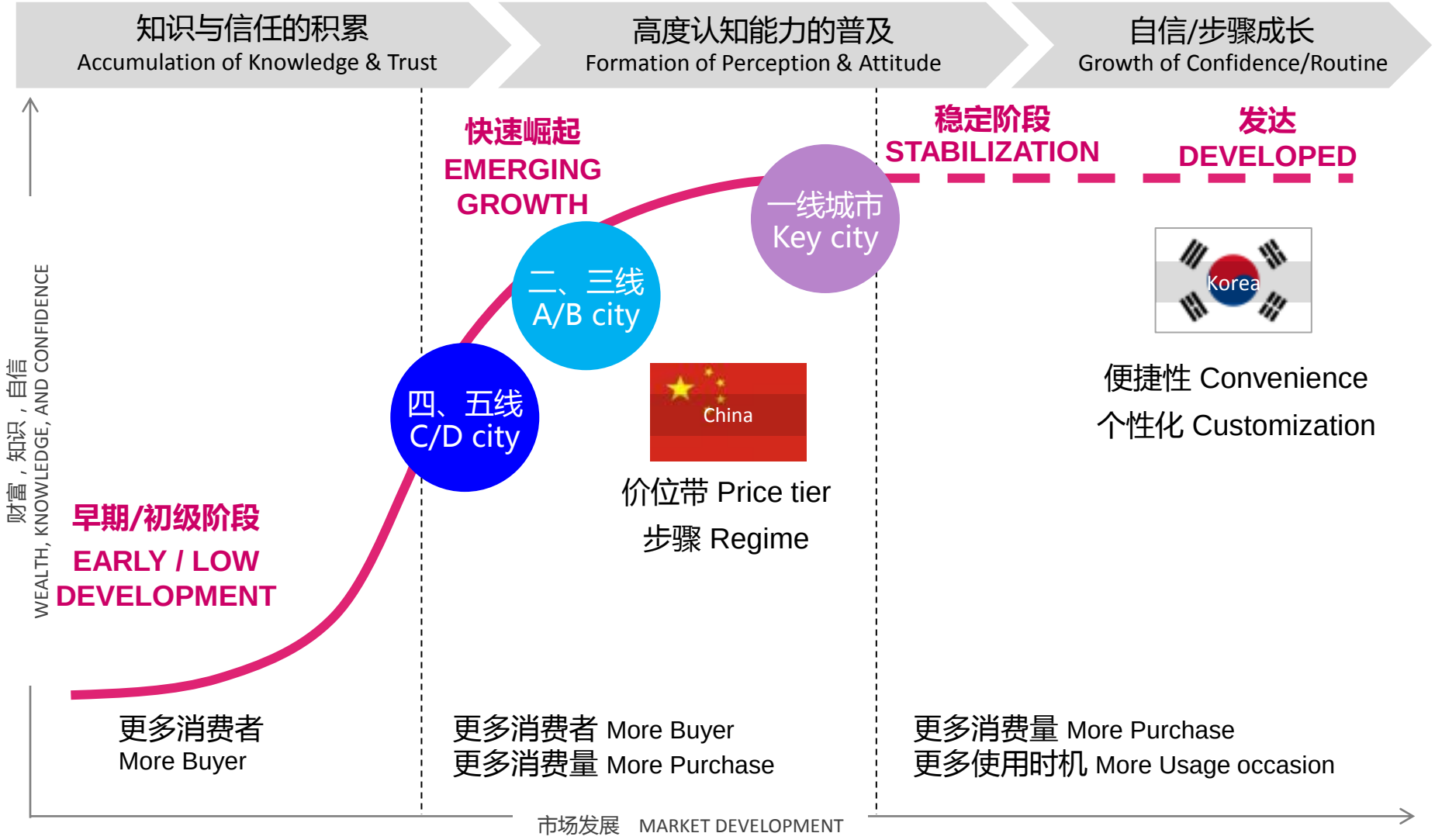
Trends & Evolutions in Cosmetics Market

消费者需求动力

Triggers from the Consumers

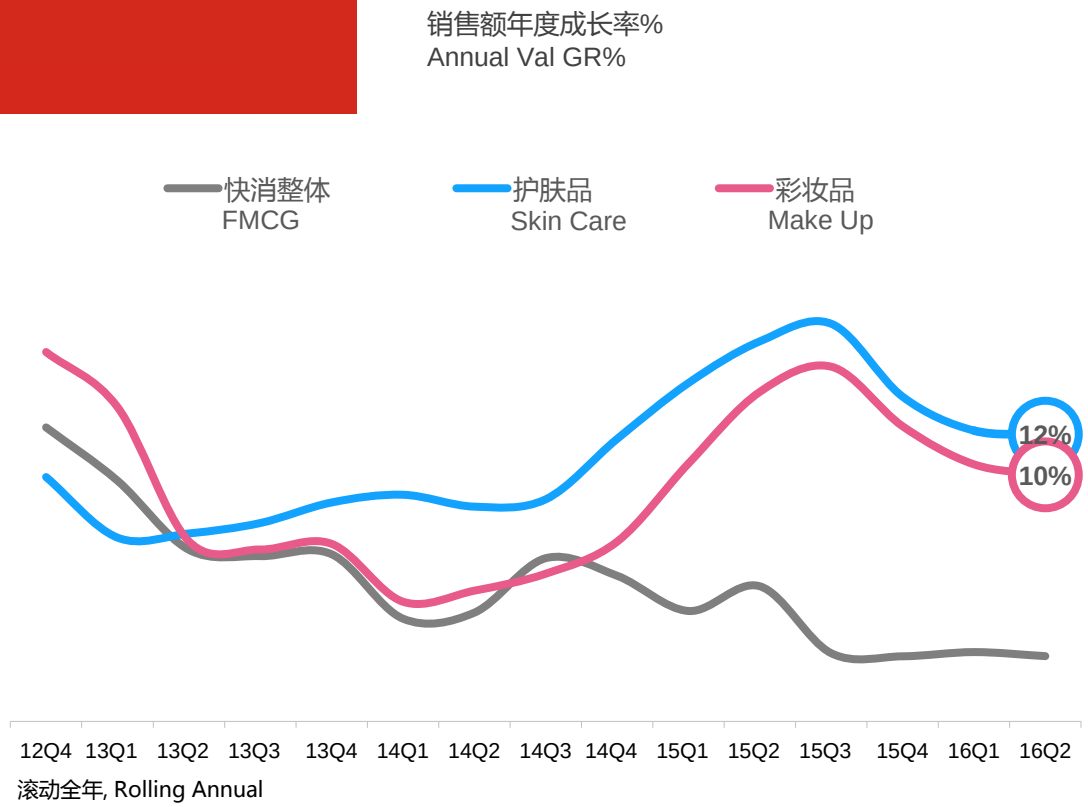
市场发展的三大阶段

The Three Stages of Market Development



中国美妆市场保持双速高成长，消费者不断成熟和升级

China Beauty Market Maintained Double Digit Growth Thanks to Premiumization and Sophistication



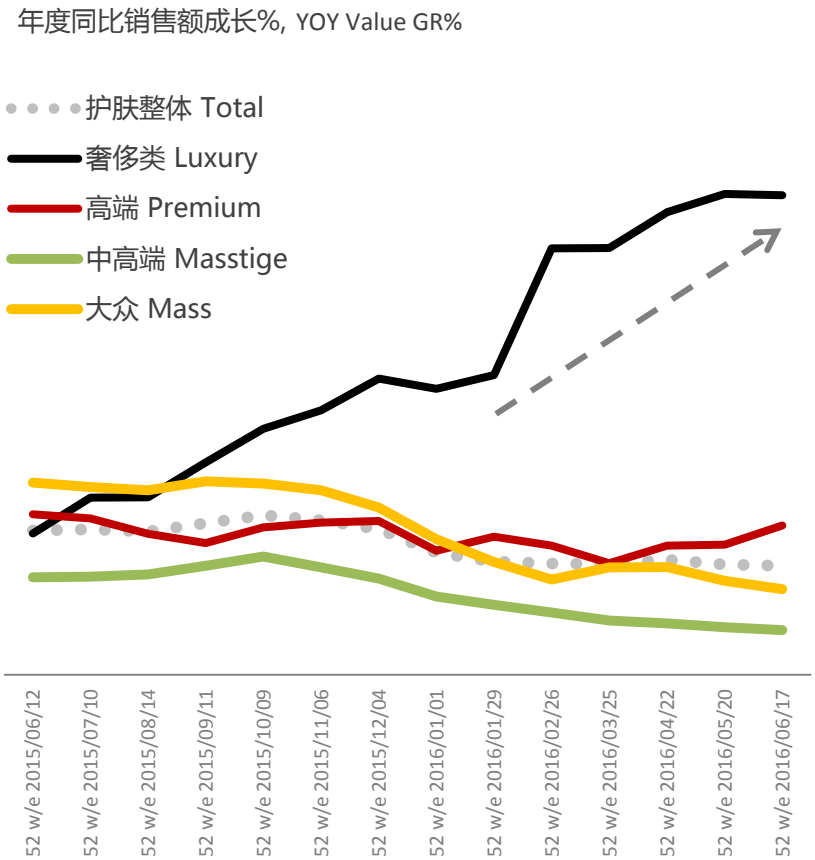
消费力高端化
Price Premiumization

美妆行为成熟
Regime Sophistication

高端化是2016年市场主旋律，奢侈品牌需求爆发。

Prermiumization Is the Main Growth Engine and Luxury Brands Benefit the Most.

消费力高端化
Price
Premiumization



* 高端化对市场整体的贡献%
Value contribution% from price to total cosmetics growth

数据来源：凯度消费者指数家庭样组– MAT16Q2

© Kantar Worldpanel

奢侈品牌把蛋糕做大，消费者的价格跨度越来越丰富

Luxury Brands Bring Organic Growth to the Market as Consumers Are Buying Across More Price Segments.

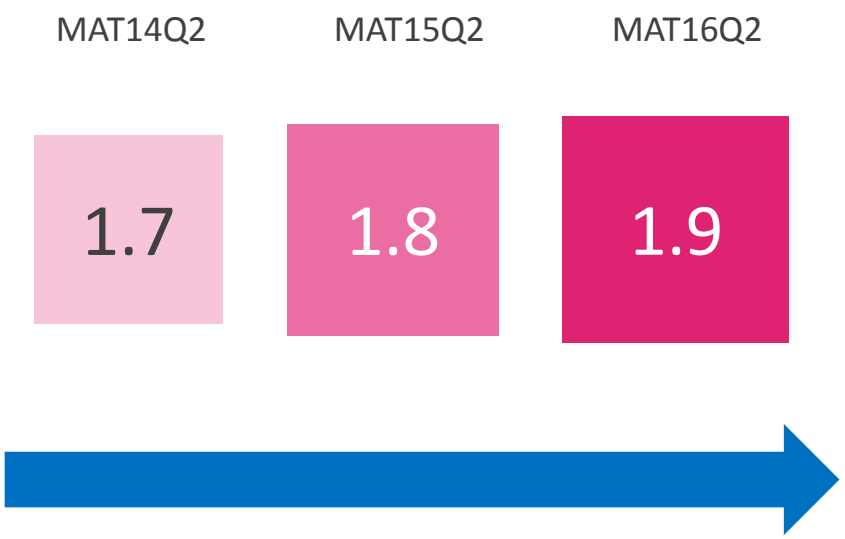
消费力高端化
Price Premiumization

46%

奢侈护肤品成长来自额外增加的购物篮

Of luxury sales growth mainly thanks to consumers adding luxury brands into their repertoire

消费者购买的价格种类的数量变化
# of price segment purchased of one single consumer



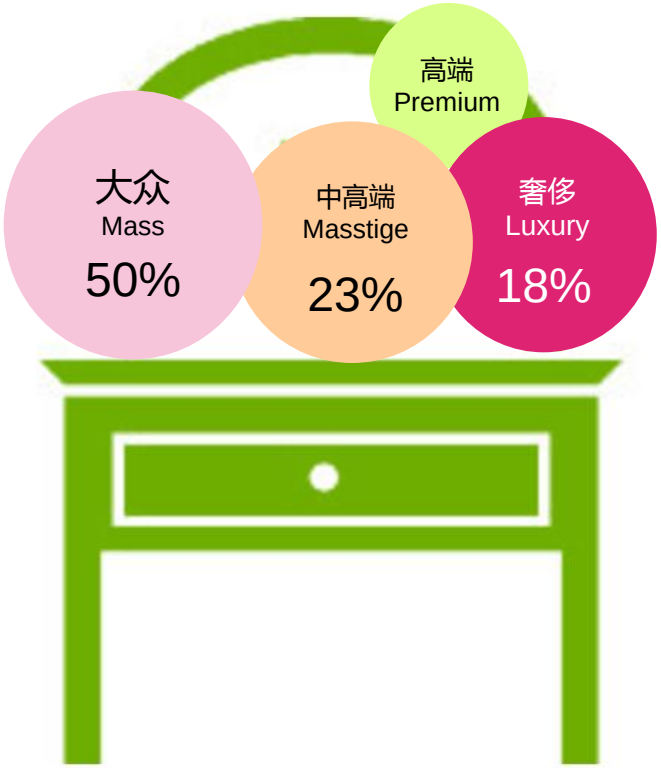
© Kantar Worldpanel

消费者更为挑剔和花心。以不同需求出发打造HERO SKU为制胜关键。

Consumer's Needs Emerge. Build your hero SKU to meet diversified consumer needs is the key to win.

消费力高端化
Price Premiumization

奢侈类护肤品消费者的所有护肤产品构成 – 销量（瓶）%
Product repertoire of luxury skin care buyers – Vol(pack)%



它们出现在同一个消费者的梳妆台上
Product portfolio on the dressing table of one panelist

爽肤水 & 乳液
Toner & Lotion
大众类

洗面奶
Face Cleanser
大众类

精华
Essence
奢侈类

眼霜 Eye
高端

面膜 Mask
中高端

防晒 Sun
中高端

数据来源：凯度消费者指数家庭样组 – MAT16Q2

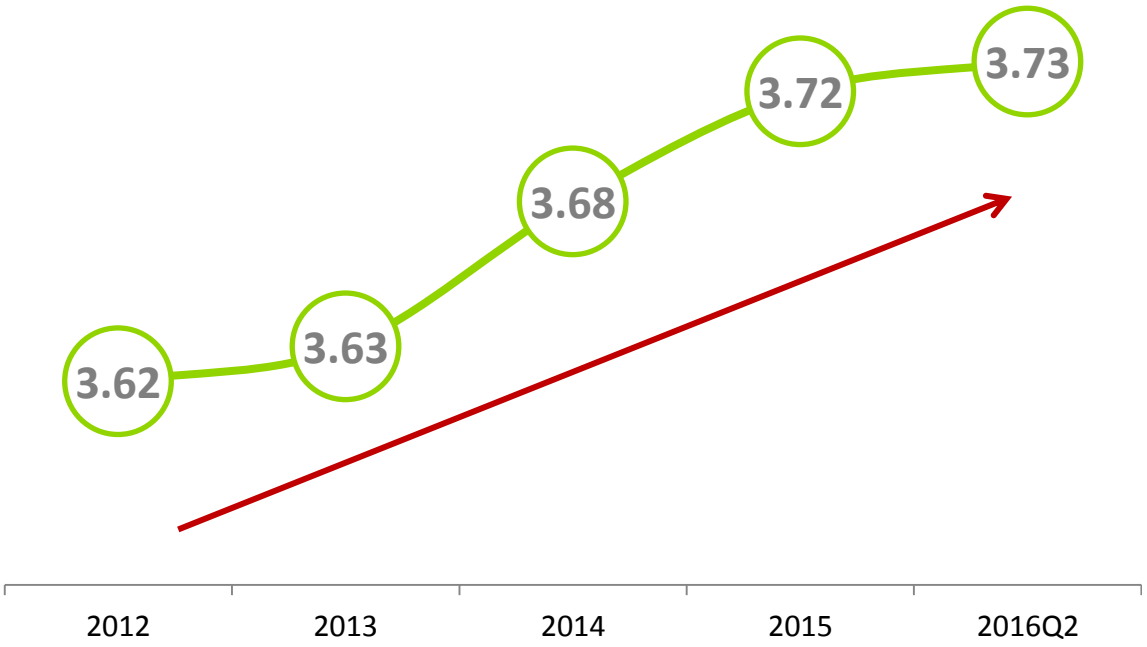
© Kantar Worldpanel

过去5年中，中国女性的美妆步骤稳步上升

The Beauty Regime of Chinese Women Has Been Increasing Thanks to Sophistication.

美妆行为成熟
Regime
Sophistication

消费者每年购买的不同类型的化妆品（护肤品+彩妆）数量
Trend of the cosmetics regime size (skin care + make up)



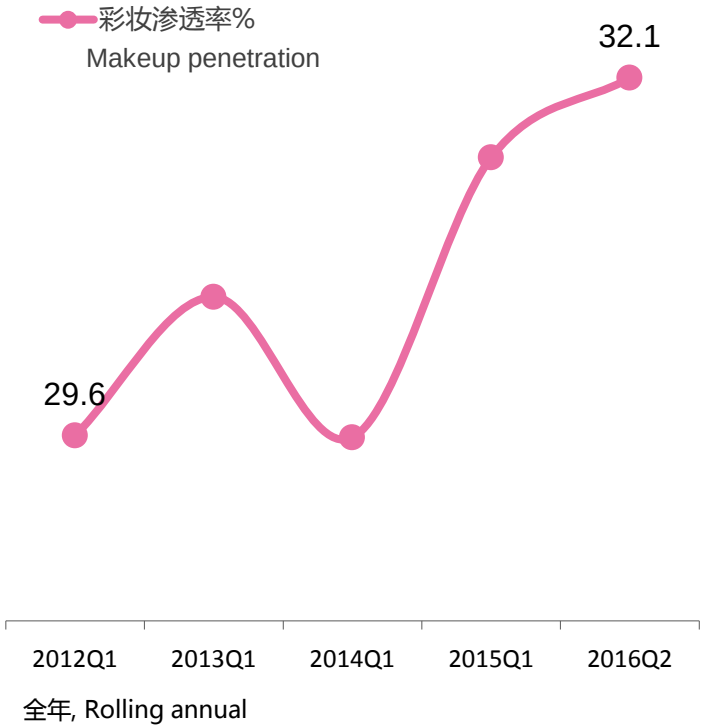
数据来源：凯度消费者指数家庭样组–MAT16Q2

© Kantar Worldpanel

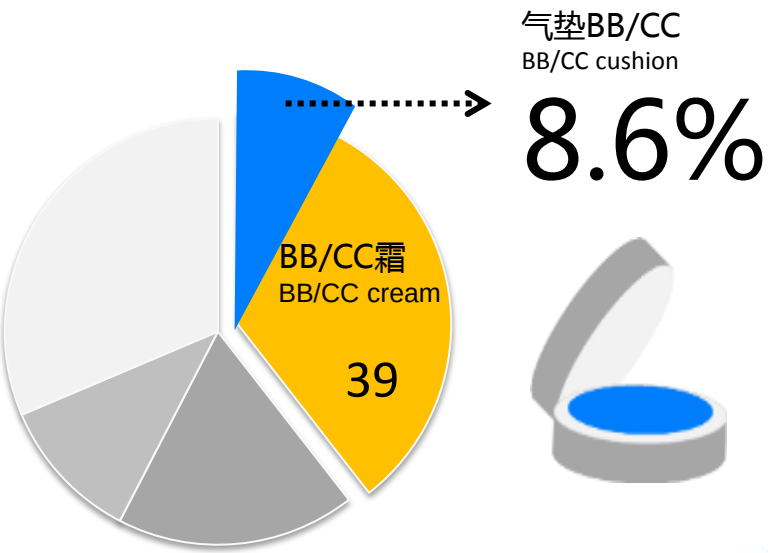
彩妆爆发式成长，越来越多女性化妆。气垫BB以便捷高效，成为入门新宠

As Make-up Buyer Expands, BB Cushion Becomes the Entry Product Thanks to Its Convenience and Effectiveness.

美妆行为成熟
Regime Sophistication



彩妆子类销售额%，Val% of makeup formats
- 在品类尝新者（渗透率=18%）的购物篮中
Among the category trialists (Pen%=18%)



数据来源：凯度消费者指数家庭样组–MAT16Q2

© Kantar Worldpanel

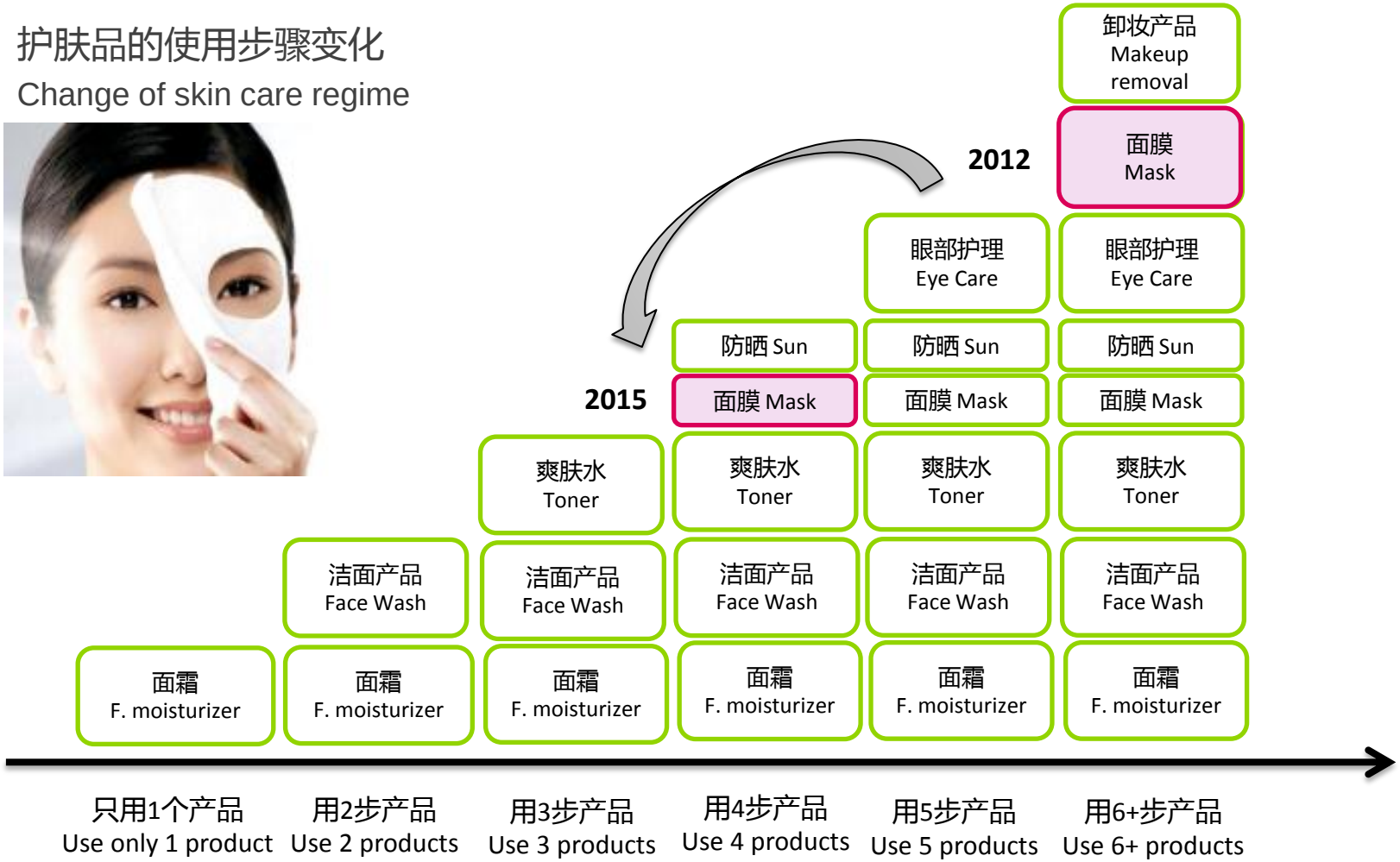
面膜使消费者化妆台更丰富，已坐稳护肤组合第四把交椅，

Mask Is the Key Driver for Skin Care Sophistication, Which Grew from the 6th to the 4th Skin Care Regime in 4 years.

美妆行为成熟
Regime Sophistication

护肤品的使用步骤变化

Change of skin care regime



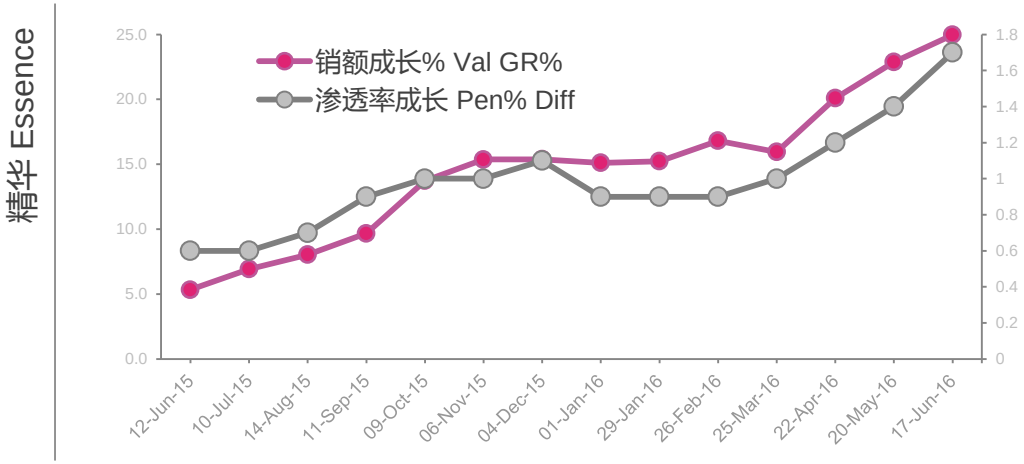
数据来源：凯度消费者指数使用样组– 中国一二线城市·MAT16Q1·16-55岁

© Kantar Worldpanel

精华可能成为下一个风口

Essence Would Become the Next Trend Setter.

美妆行为成熟
Regime
Sophistication



深入高效
Intensive Treatment

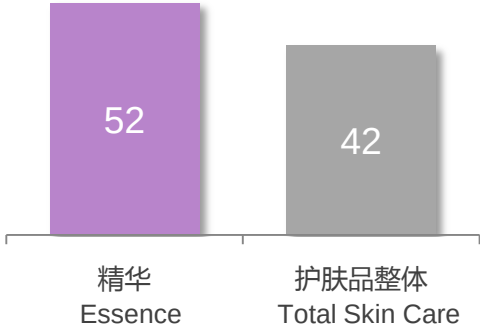
精华使用原因 – 使用时机%
Usage triggers of essence – occas%

滋养肌肤 – 131*
Nourish my skin

修复肌肤 – 263
Repair my skin

年轻女性最爱
Welcomed by Young Women

20-34岁消费者年龄分布 - 购买者%
Age 20-34 yrs buyer share – buyer%



多元可触及
Price Accessibility

成长最快SKU – 购买量
Fastest Growing SKU – Purchase Record

悦诗风吟 Innisfree

玫琳凯
Mary Kay

雅诗兰黛 ELC

中高端 Masstige	高端 Prestige	奢侈 Luxury

NO1- 悦诗风吟绿茶籽精华 Innisfree Green Tea Serum
NO4 - 玫琳凯亮采精华液 Mary Kay Ultimate Serum
NO10 – 雅诗兰黛润修护肌透精华露 ELC Advanced Night Rep

市场变革中，消费者细分日益复杂，清晰定位方能把握先机

Sophistication Will Continue to Drive Market Growth, Clear Positioning Will be the Key Successful Factor to Win the Complex Market.

消费力高端化
Price Premiumization

高端化
是最重要趋势
Premiumization is the growth engine

消费者需求
日益复杂/挑剔
Beauty regime is getting sophisticated as consumer's needs emerge

美妆行为成熟
Regime Sophistication

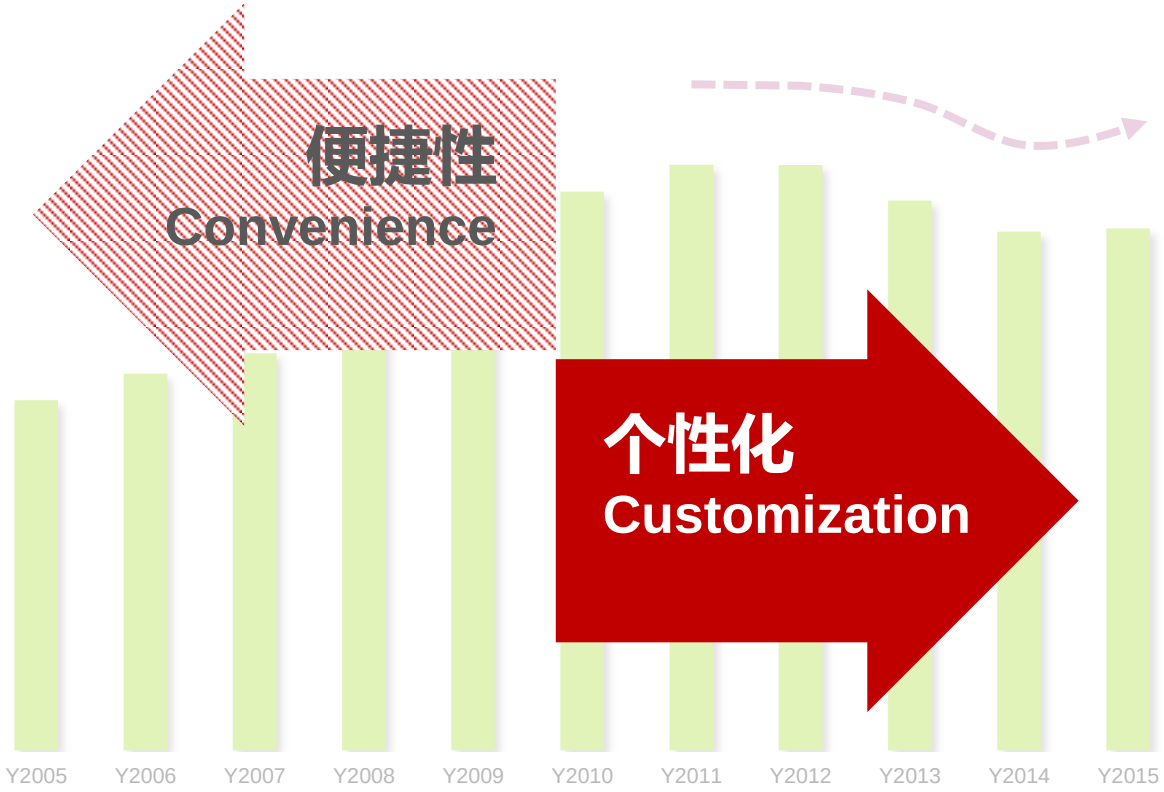
气垫底妆
成彩妆入门新宠
Cushion is the new entry product for makeup

面膜稳坐第四步，
精华是下一个风口
Mask is the 4th step of skincare. Essence would be the next trend setter

© Kantar Worldpanel

韩国市场在复杂的市场细分中曲折发展

Korea Market Growth Through Complicated Elaboration



© Kantar Worldpanel

所有护肤品，除了防晒和面霜，都面临市场紧缩

In Skin Care, All Types Except Cream and Sun Are in Contraction

31%

消费者使用的护肤品比过去少

Of consumers are using less products than before

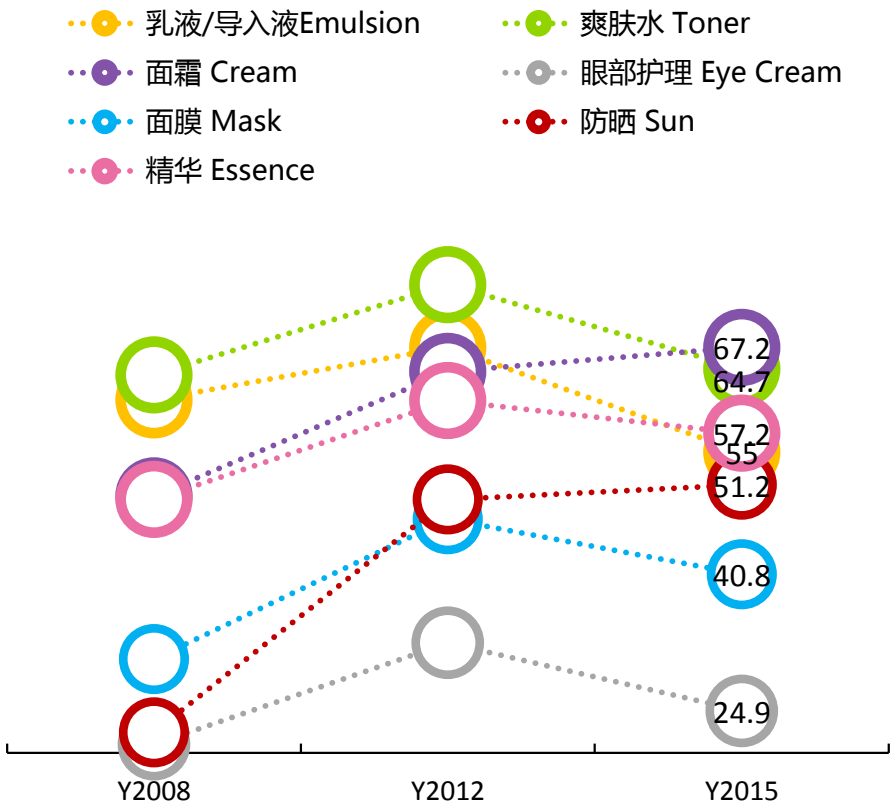
2013年 – 5.2种

5.2 types in 2013

2015年 – 5.0种

5.0 types in 2015

渗透率%趋势 Penetration Trend (%)

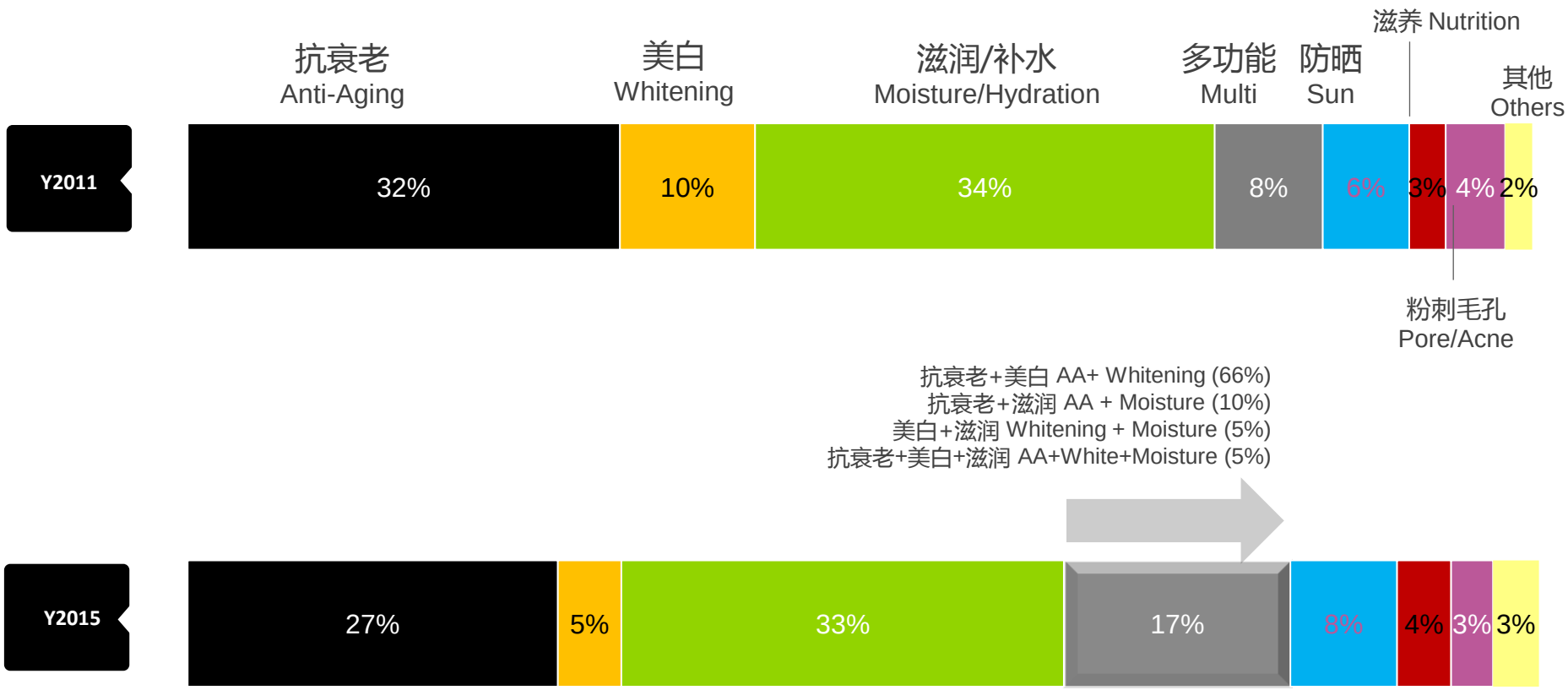


数据来源：美妆趋势-公开调查 Beauty Trend – Open survey

© Kantar Worldpanel

功效选择寻求便捷，多功能产品繁荣

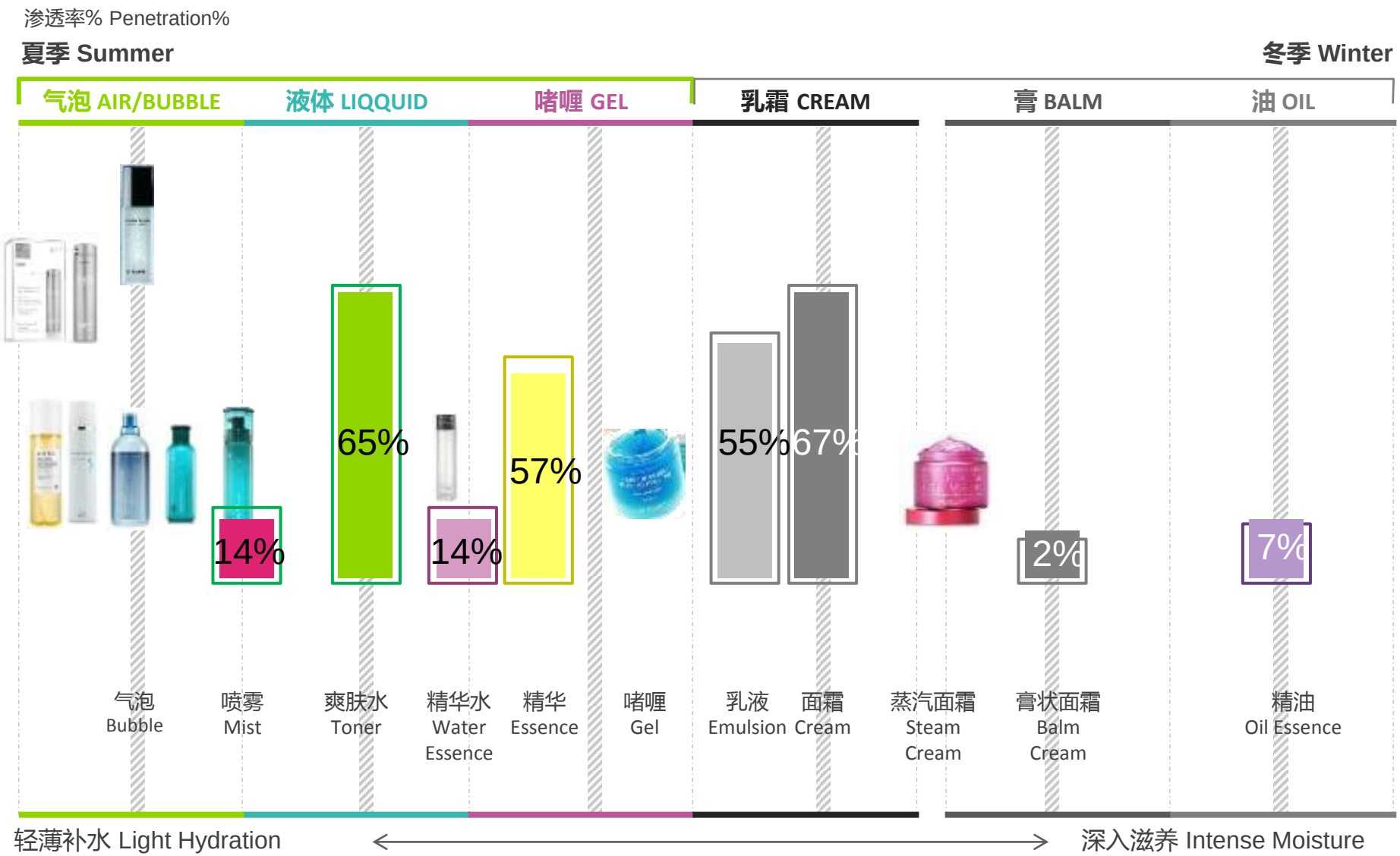
Benefit is Converging to Multi Care



© Kantar Worldpanel

另一方面，产品质地不断细化，超越常规

Formats are Diversifying Beyond the Usual



© Kantar Worldpanel

在核心功能以外，创新功效的产品又不断细分

Benefits are Diverging Beyond the Core

除了抗衰老，美白，滋润&多功能以外的护肤功效占比%
% of skin care benefit other than AA, white, moist and multi

Laneige / Anti Pollution Defense 抗污染

So natural / Dust off shield Facial Mist 脏污屏蔽喷雾

Holika Holika Dust Out
阻隔灰尘与脏污

Cleanser: Canadian Ice Mud that are crushed to micro size to absorb and penetrate deep to take away the micro dust from the skin.
Cream: Last step in the Skin care routine to build the film to protect from the harm.
Mist: Protects from micro dust and provides moisture

Verite / Triple Energy Ampoule 三倍能量安瓶
Acai Berry, Acerola

Huxley / Anti Oxidant Cream
抗氧化面霜

It's Skin / Power 10 Formula 能量10安瓶

Maska Intensive Spray Serum in Mask
Anti-Oxidant 抗氧化

© Kantar Worldpanel

表面追求便捷，本质探索个性化

Seeking Convenience is on the Surface but, Exploring More Customization Underneath

便捷 Convenience

质地 Texture

清洁面膜，液体唇膏，防晒气垫，BB/CC霜
Cleansing Mask, Lip Lacquer (Tint + Gloss), Sun Cushion, BB/CC,

配方概念 Ingredient & Concept

专业品牌，在家护肤
Professional Brands, Home Care

功效 Benefit

多功能
Multi-Benefit
(AA+White; AA+Moisture)

使用时机 Occasion

眼霜替代面霜
Eye Cream as Face Cream
(AHC)

质地 Texture

精油，粘稠爽肤水，膏状面霜，油膏面霜，气泡水，
Oil Essence, Mucus Toner, Balm Cream, Ointment Cream, Bubble/Capsule,

配方概念 Ingredient & Concept

药妆，美容工具，美容药品，生活方式
Derma Care, Beauty Device, Beauty Supplement, Lifestyle

功效 Benefit

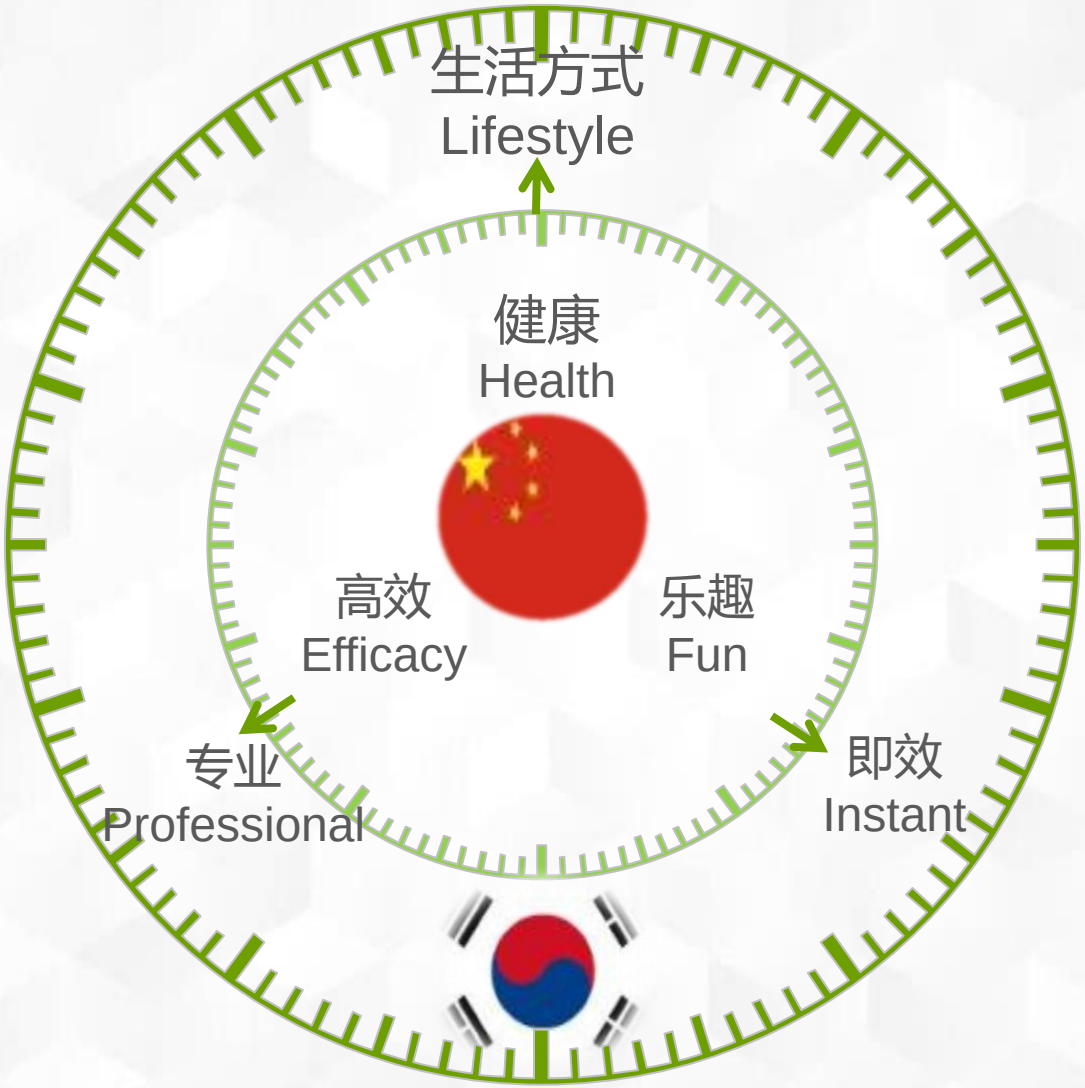
提拉紧致，皮肤再生，抗污染，抗氧化
AA – Lifting, Regeneration etc
Anti-Pollution, Anti-Oxidant

使用时机 Occasion

季节性Seasonal,
早晚Morning/Night,
普通日/高压日/特殊日
Rough Day, Stressed day,
Special day,
随身携带 On-the Go

个性化 Customization

© Kantar Worldpanel


生活方式
Lifestyle
健康
Health
高效
Efficacy
乐趣
Fun
专业
Professional
即效
Instant

[健康] 天然安全是中国市场核心诉求，带动品牌升级

[Health] Health and Natural Are the Fundamental Needs for Chinese Consumers, Which Also Drives Premiumization.

销额成长率% | 销额%,
护肤市场整体
Val GR% | Val% in TT
Skin Care
MAT2016P2 vs MAT2015P2

innisfree +55% |0.73%

One leaf 一叶子 +404% |0.32%

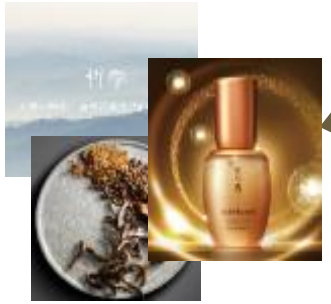
植物原材料
Raw material from plants

酵素
Ferment

Cloud 9™ BLANC DE WHITE +34% |1.12 %

雪花秀 Sulwhasoo +264% |0.53%

动物原材料
Raw material from animals



平衡哲学
韩方
TCM/TKM

© Kantar Worldpanel

[高效] 医学美容的理念进入日常护肤品，消费者希望获得诊所级的高效护理

[Intensity] Efficacy Becoming More Attractive to Chinese Consumers. Derma Concepts Become Popular in Daily Skin Care Products

医学美容带回家

Clinic treatment bring to normal products

涂抹式玻尿酸/水光针

Hyaluronic acid / Mesotherapy

“水光针”概念沟通
“Mesotherapy” used in communication

玻尿酸添加，“针剂”概念植入产品
Hyaluronic acid added in products

© Kantar Worldpanel

[乐趣] 面对年轻消费群，有趣很重要。品牌玩转“粉丝经济”和个性标签

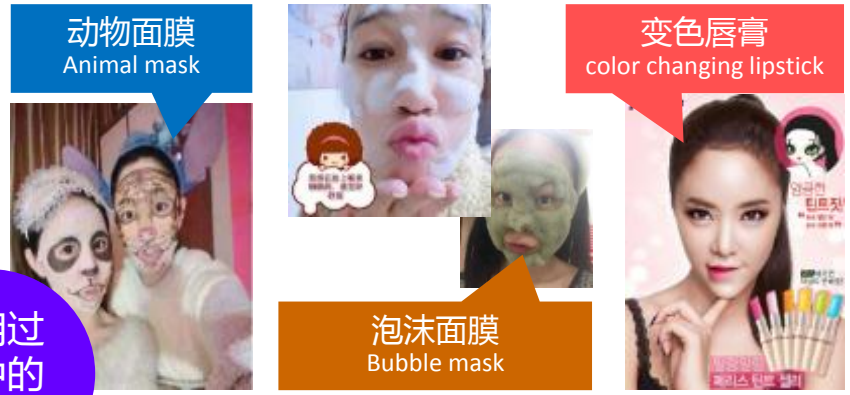
[Fun] Brand Image/ Communication/ Usage Are Getting Critical in Engaging Young Consumers. Are You Fun And Different?

韩流、小鲜肉

Korea Wave, Fresh Meat

购买过程中的 fun

Fun in purchasing



使用过程中的 fun

Fun in usage

© Kantar Worldpanel

[生活方式] 在韩国，生活方式和环境被认为是影响皮肤状态的最重要因素

[Lifestyle] Leading Factors That Impact Skin Appearance Is Associated with Lifestyle You Lead And the Environment You Live in

Iope Urban Aging Corrector 抗衰老

EL Anti oxidant Detox cream 抗氧化

Somang/City Care Pollutop 抗污染

问卷研究：影响皮肤状态的主要因素是什么？
Questions: leading factures that impact on skin care experience?

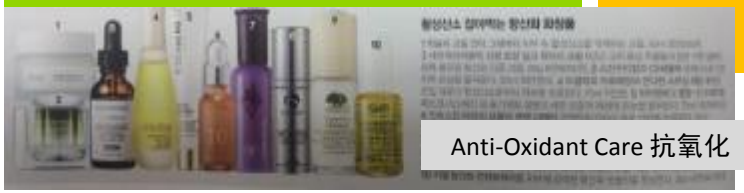
50%
生活方式 Life Style
- 睡眠 Amount of Sleep
- 压力 Stress

38%
日晒 Sun Exposure

37%
基因 Genetics

34%
饮食 Diet

18%
环境 Environment



Anti-Oxidant Care 抗氧化

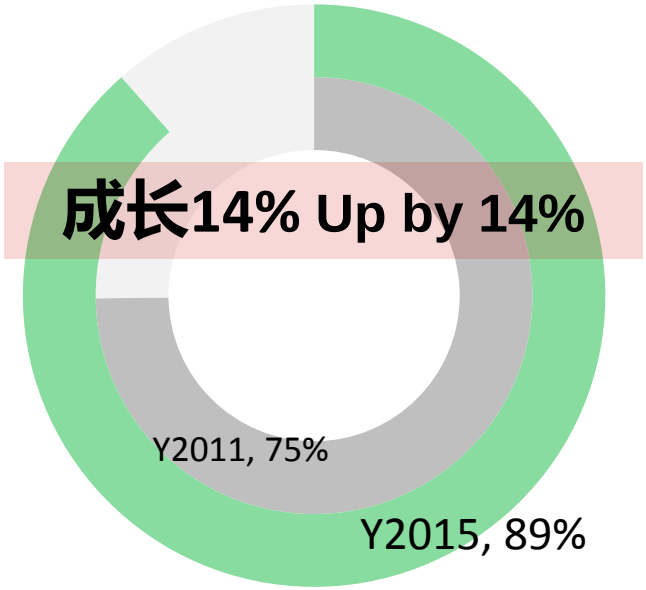
So natural / Dust off shield Facial Mist 抗垃圾

© Kantar Worldpanel

[生活方式] 彩妆也被融入了生活方式 – “不化妆，零排放”

[Lifestyle] Even the Color Makeup is Being Absorbed as Part of the Lifestyle – No Make Up; No Poo

具有护肤功能的彩妆产品
Face Make Up with Skin Care Benefit



唇釉&油 系列
Tint & Oil series

© Kantar Worldpanel

[专业] 药妆、安瓶、高科技配方快速发展

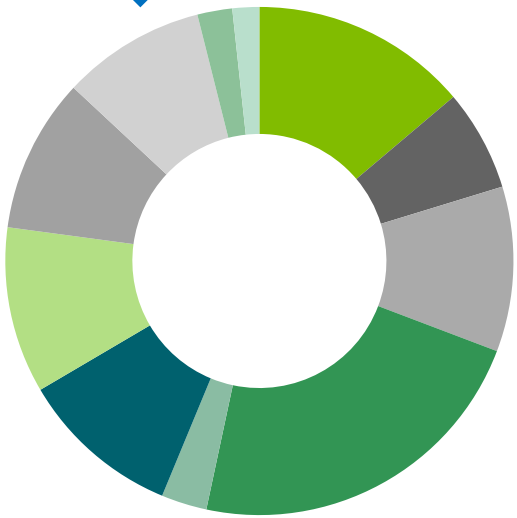
[Professional] Fast Growing of Derma, Treatments, Ampules and Difficult Ingredients

31%

14% in 2012

接受过微整容的女性%

% of female received Treatment in 14



- 肤色调整 Tone Enhancement
- 除皱 Wrinkle removal
- 脱毛 Hair removal
- 祛痣 Mole removal
- 祛疤 Scarr removal
- 祛色斑 Dark spot & Freckle removal
- 瑕疵修护 Imperfection Care
- 毛孔/黑头修护 Pore/Blackhead enhancement
- 粉刺护理 Acne Care
- 红斑痤疮治疗 Rosacea Enhancement
- 其他 Others

安瓶 Ampule

油膏 Ointment

玻尿酸 Hyalluronic, Ceramide Ingredients

© Kantar Worldpanel

[专业] 专业化品牌，或与专业人士合作，成为市场宠儿

[Professional] Professional Collaboration and Greater Growth from Brands That Are Specialized

Son & Park – Professional Brands

SON & PARK
SIMPLY PERFECT

VDL

eSpoir

专业品牌
Professional
Brands
+17%

© Kantar Worldpanel

[即效] 提供即时感受的产品，帮你立刻“看见”效果，获得满足

[Instant] Sensorial Products to Help You Instantly Be Aware of Its Effect or Instant Look with Contouring Makeup

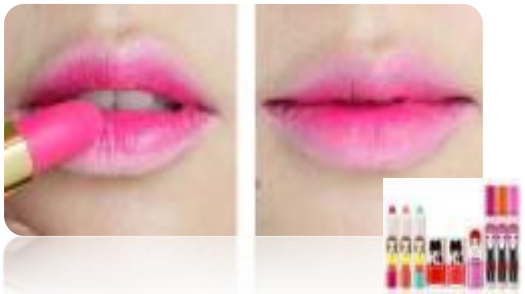
质地差异 Texture Variation

体感温度变化 Temperature

疼痛 Pain

唇部轮廓 Contour Lips

明亮色彩-> 渐变色
Vivid Color → Variety of Color spectrum



眼部轮廓 Contour Eye

调色眼影-> 持久性彩妆
Pallette → Staining Tatoo

脸部轮廓 Contour Face

高光，阴影，轮廓线
Highlighter, Shading, MB

© Kantar Worldpanel

未来的美妆是怎样的？
WHAT DOES FUTURE OF BEAUTY ENTAILS?

分时机的护理 – 护肤步骤因你的状态和心情而变
Situational Care – Beauty Routine Changes With Your Need and Emotion

通勤专业的一天
Professional work day

宅在家 – 放松的一天
In home relax bad hair day

约会日
D-Day

约会日倒计时
Countdown to D-day

高压力/大姨妈
Heavy stress or PMS

重度污染/高紫外线
Heavily polluted or High UV

© Kantar Worldpanel

[NOW]

One Brand Fit for All Steps

“Winning the Heart of the Consumers”

[FUTURE]

No One Brand Fit for All Steps

“Winning the Footfall of the Consumers”

© Kantar Worldpanel

不断细分的美容时机
MICRO MOMENT IN BEAUTY

护肤步骤缓慢增长，但差异化时机增加
Mild Growth on Steps but, Various Occasion
或立即见效，或持续性护理
For an Instant Result or Long-Lasting Treatment
美妆同时满足功能和情感诉求
Understanding Both Physical & Emotional Beauty

Beauty
Decode 美丽解码

谢谢
THANK YOU