KANTAR WORLDPANEL

The 16th 2017 Cosmetic Seminar

Beauty, Today and Tomorrow

(Understanding Millennial Generation)

AGENDA

	Contents	Keynote Speaker/ Company
Lecture 1	Global Beauty Trend	Ashley Kang KANTAR Worldpanel Asia
Lecture 2	Unlocking LatAm Beauty Market Potential	Manira NAUFAL KANTAR Worldpanel Asia
Lecture 3	European beauty and its opportunities	Julie PONS Europanel
Lecture 4	New Beauty Generation Of China	Elaine LIU KANTAR Worldpanel China
Lecture 5	Korean Hair& Body Trend and Millennials	Jiwon Kim KANTAR Worldpanel Korea
Lecture 6	Korean Cosmetics Market Trend	Kibeum Lee KANTAR Worldpanel Korea
Lecture 7	Beauty Consumption Behavior of Korean Millennials	Koeun Shin KANTAR Worldpanel Korea

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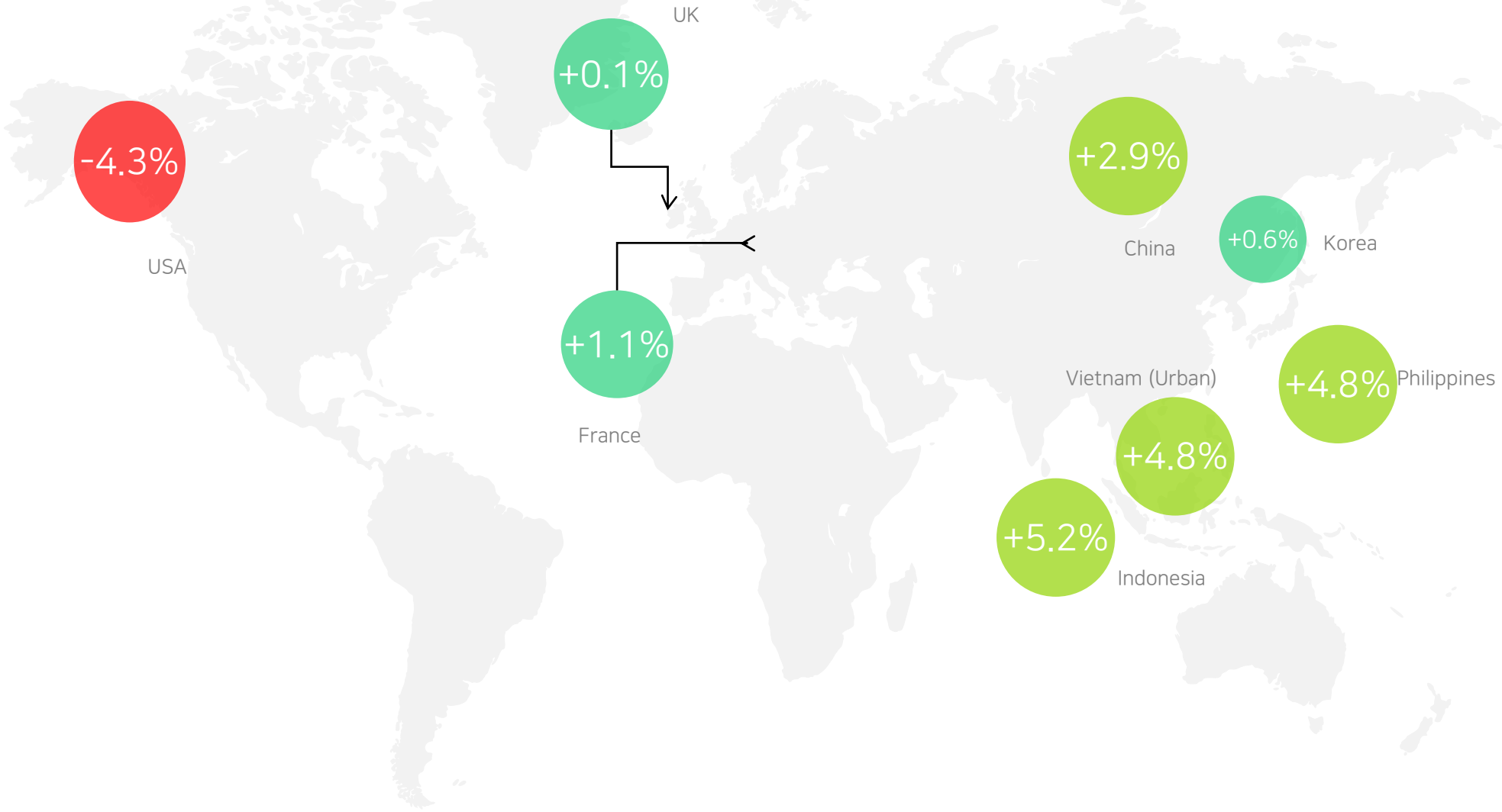
Lecture 1. Global Beauty Market

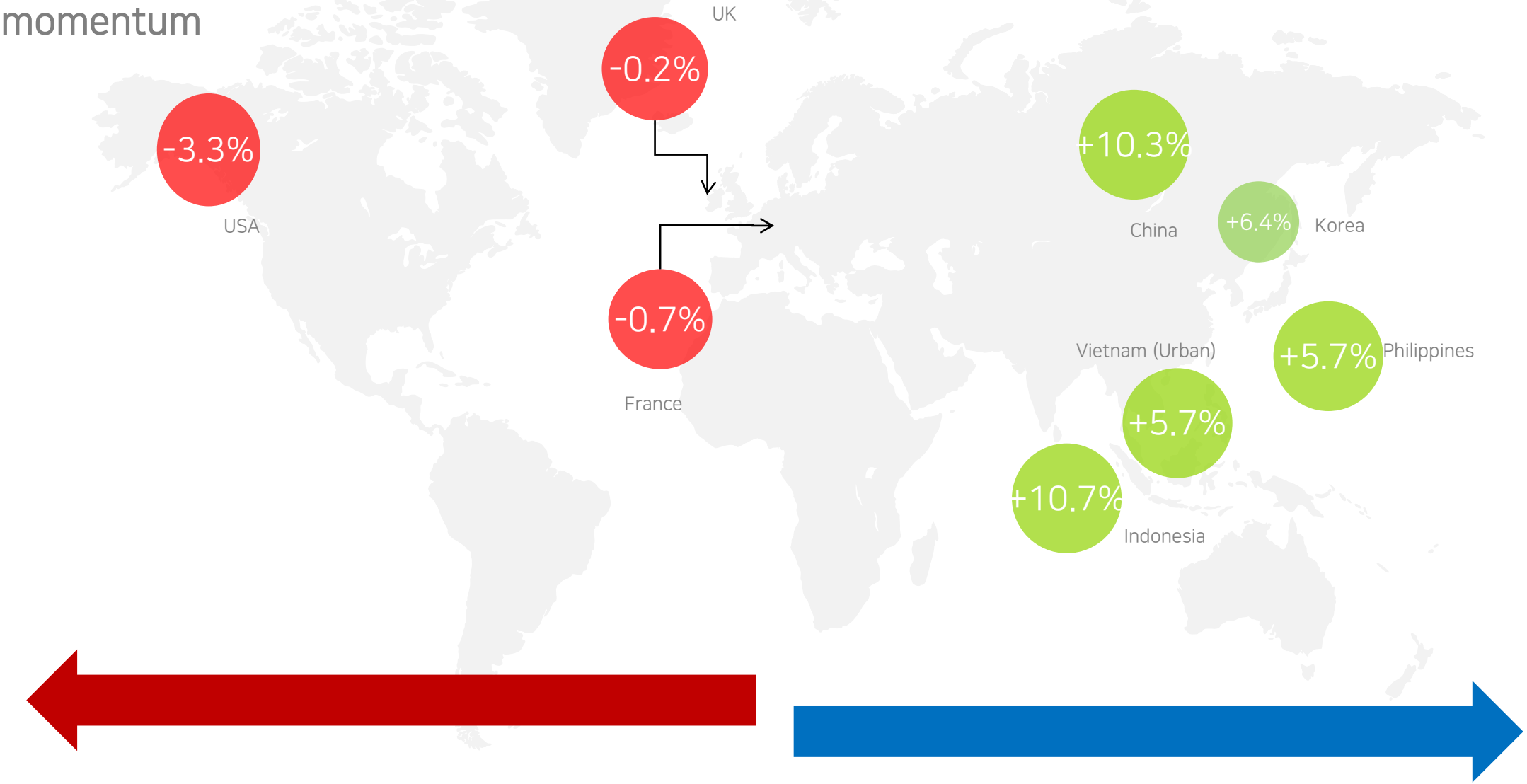
Ashley Kang

Kantar Worldpanel Regional Sector Director APAC

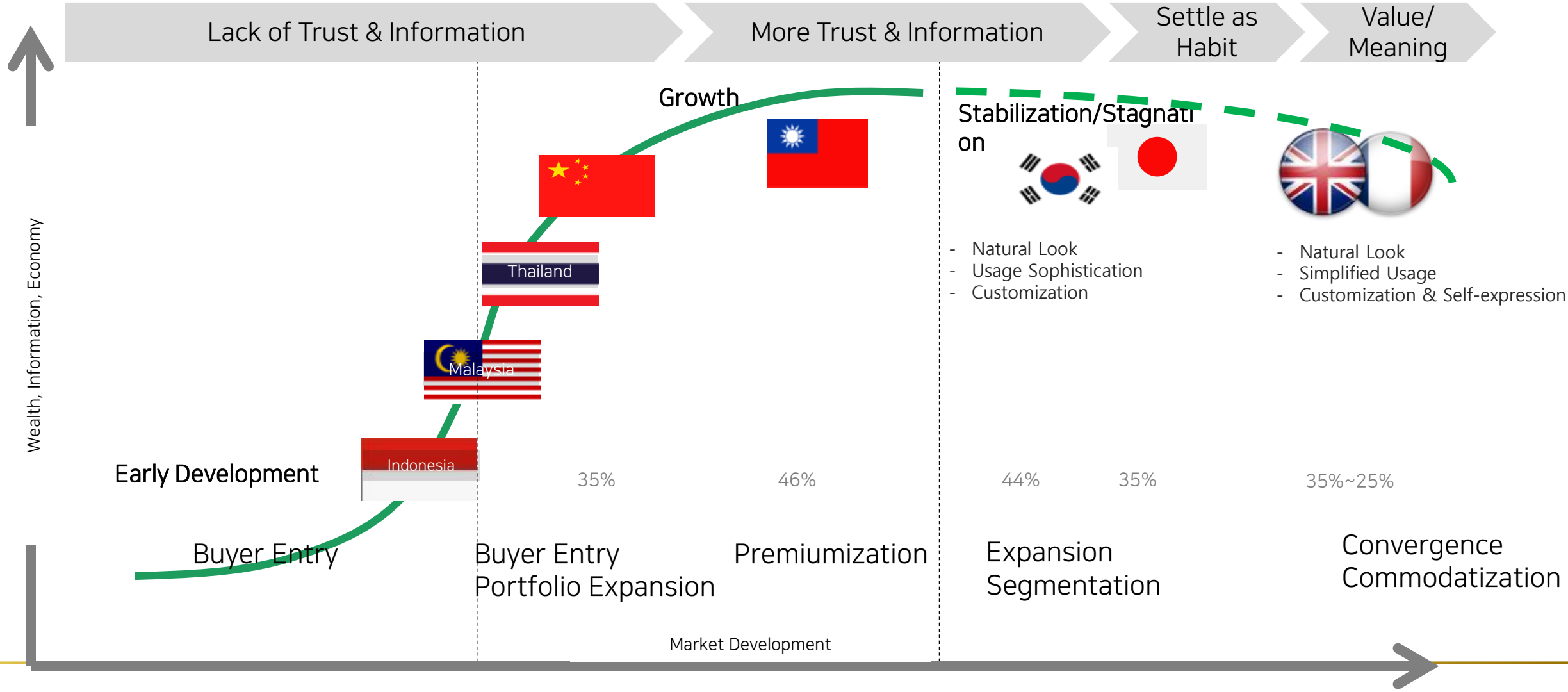
Global FMCG market in stagnation or slowdown



On the other hand, Personal Care market polarize with either further contraction or with greater growth momentum



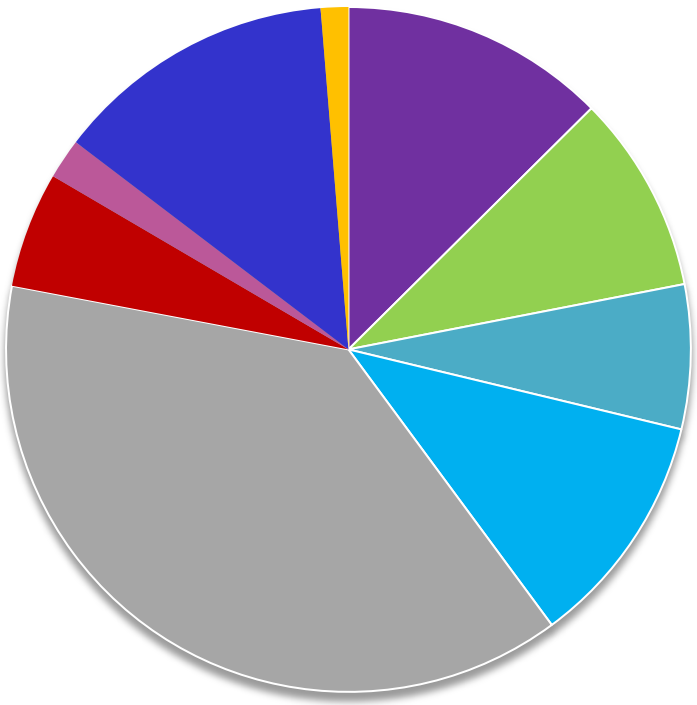
SEA fast growing with buyer inflow and expansion, CN trading up to Prestige, KR trading down to Mass whilst Europe slowing down with minimal usage



Selected Beauty market increased 6% YoY

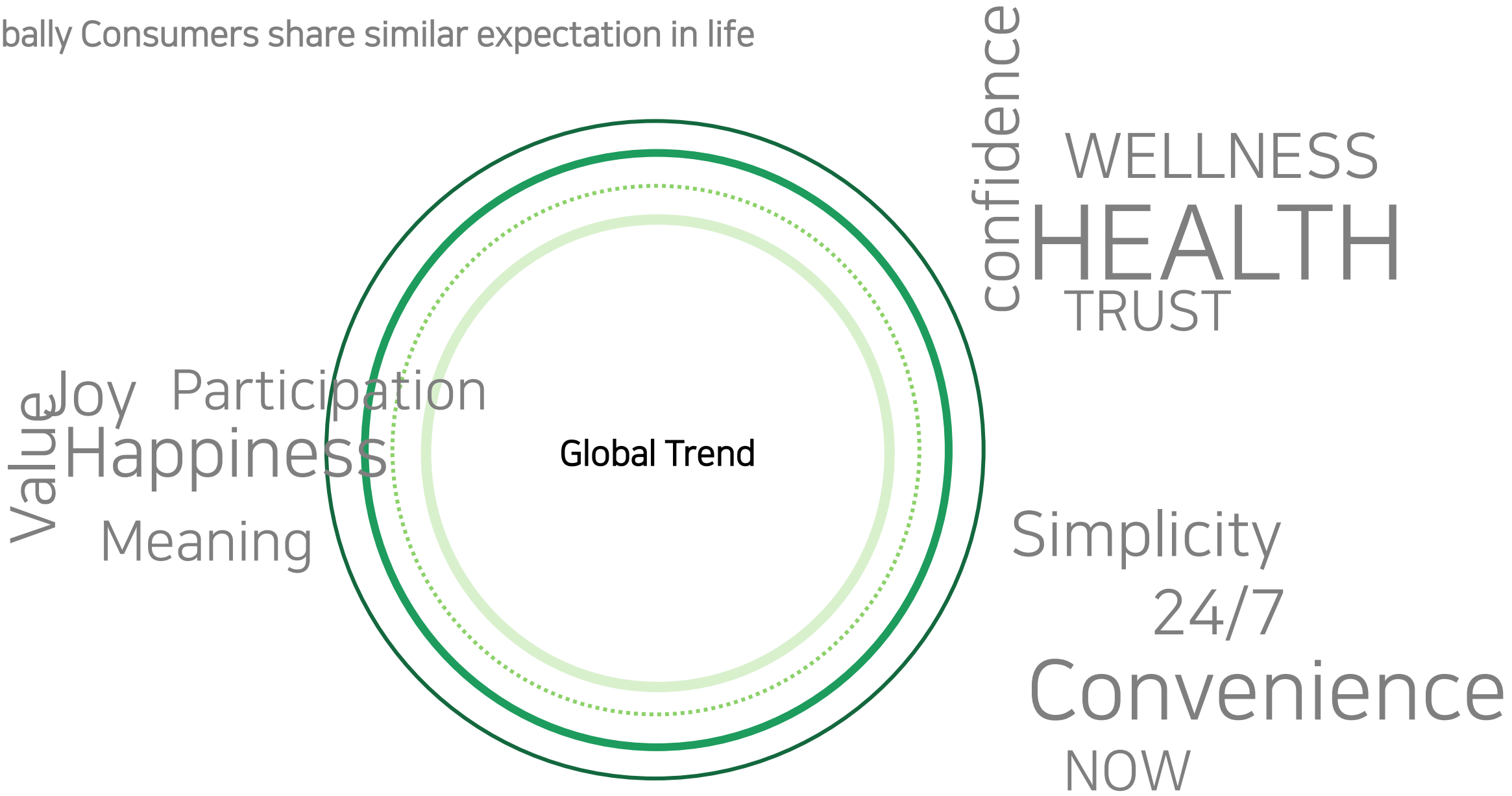
Global Beauty GR%

+6.0%



Euro	1,233.66
CN	163.78
TW	37.52
TH	32.78
MY	259.89
IDN	0.09
PH	22.66
VN	0.05

Globally Consumers share similar expectation in life



Global Trend is supported by the change in lifestyle and issues we face

[HEALTH]

- Globally aging population
- Rising concerns with Environmental issues Transparency and accessibility of information

[HAPPINESS]

- Rise of Single Household
- Slowing of Global economy shifting to shared economy
- Leading a better and meaningful life

[CONVENIENCE]

- Fast paced changes
- Emergence of technical capability

Growing need for Health conscious consumption

Environmental products

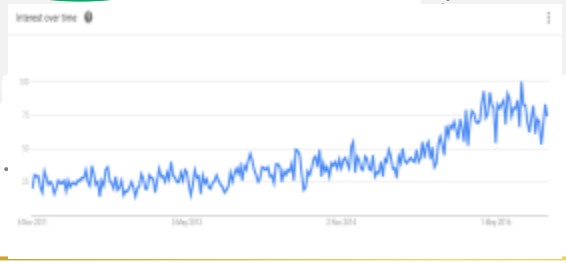
Natural Products

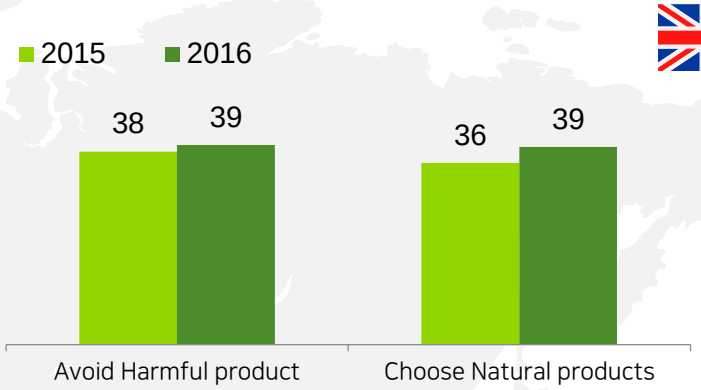
+400%

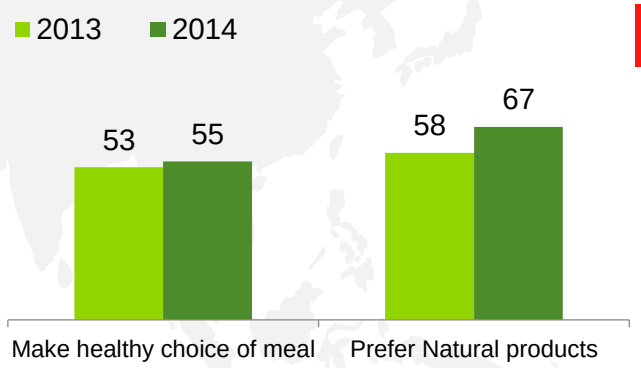
Shu Uemura
Anti/Oxi+ Cleansing oil

Kiehl's
Pollutant Defending Masque
(Overnight facial Mask)

Vegan & Organic products





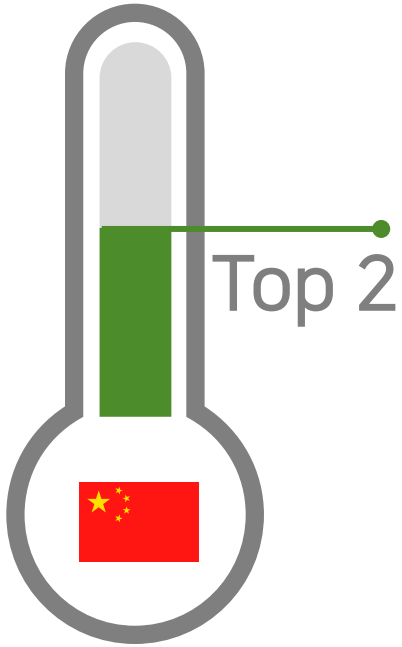


45%
"Prefer Natural products"

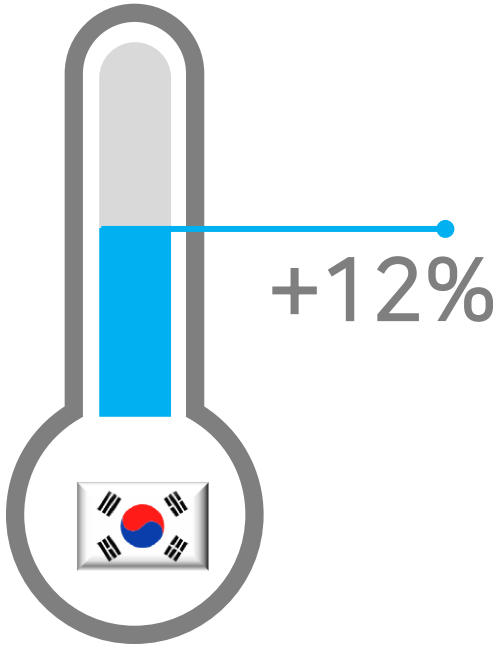
28%
"Natural products are more effective"

Varying execution under the theme of Health & Wellness

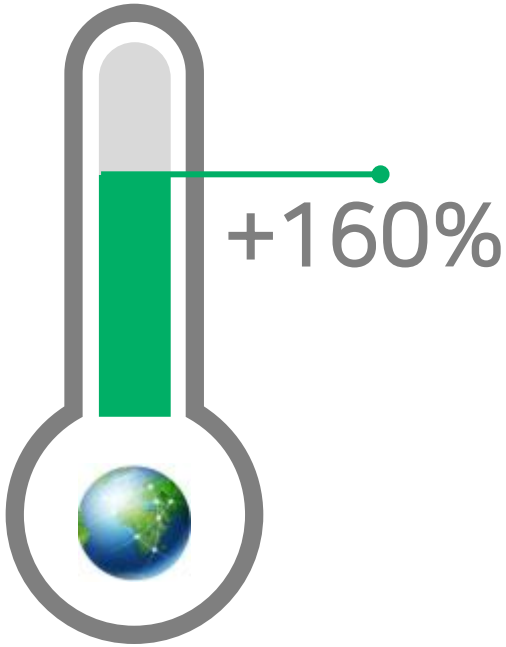
Fast rising of Local Brands in France– Le Petit Olivier, Corinne de Farme, So 'Bio, Energie Fruit



Pechoin about to become #2 brand in China soon

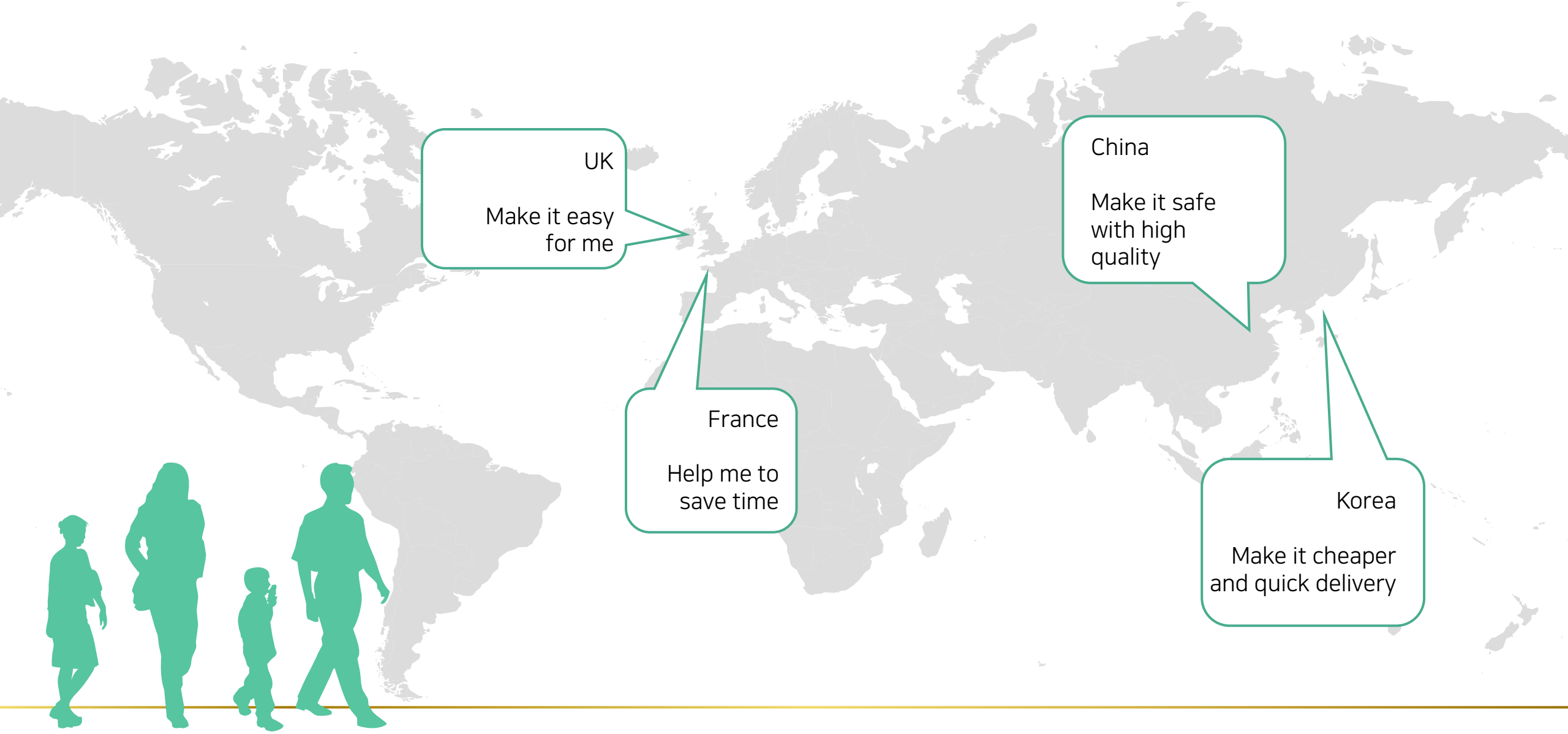


Fast development of Derma segment in Korea



Rising demand of DIY Globally

Time & Money saving, convenient online channel



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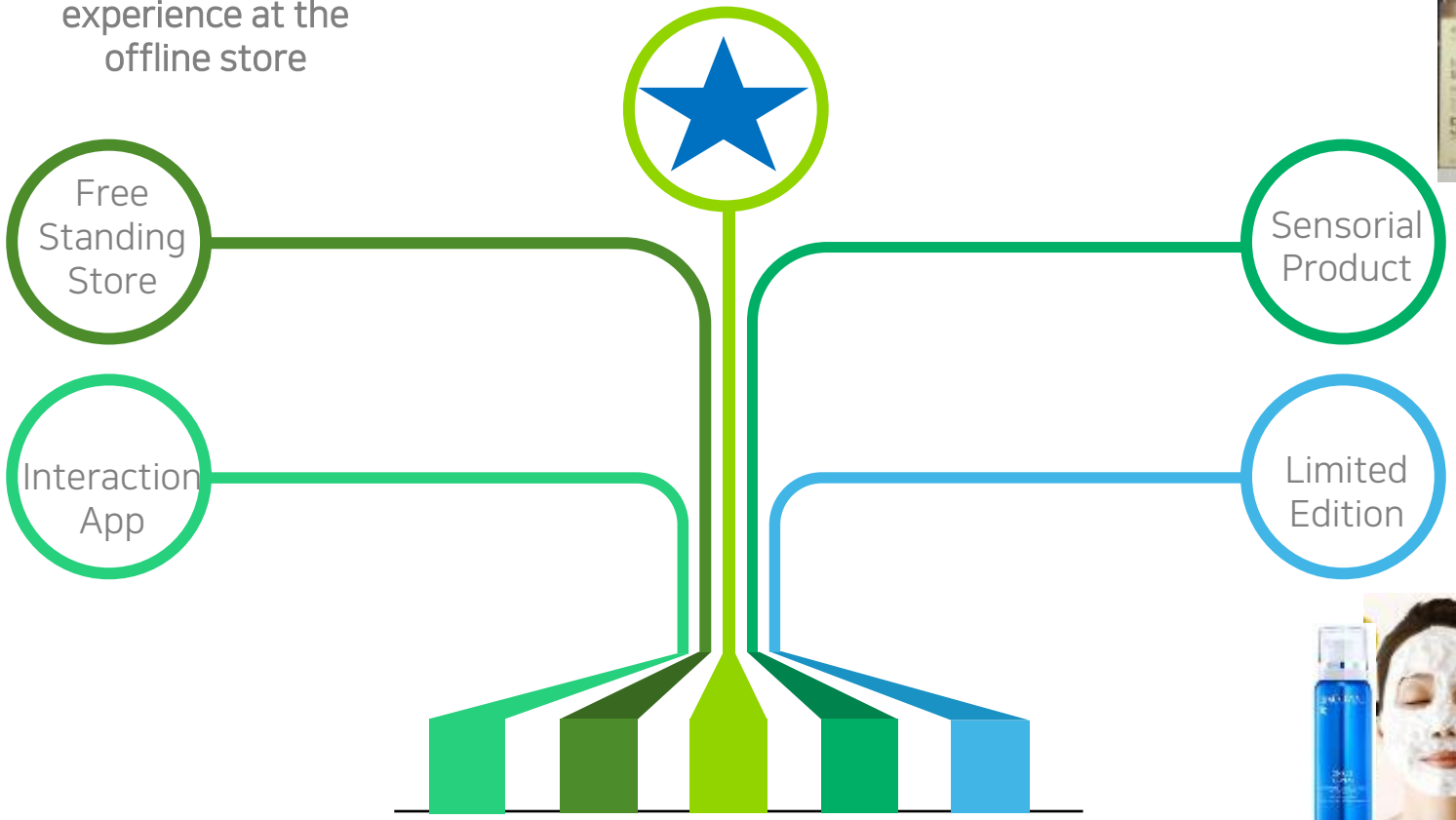
It becomes important to use five senses through experience, sharing platforms and products that are sensorial and of limited edition

Maximizing the brand experience at the offline store

Maximize the sensorial experience via the Virtual Reality

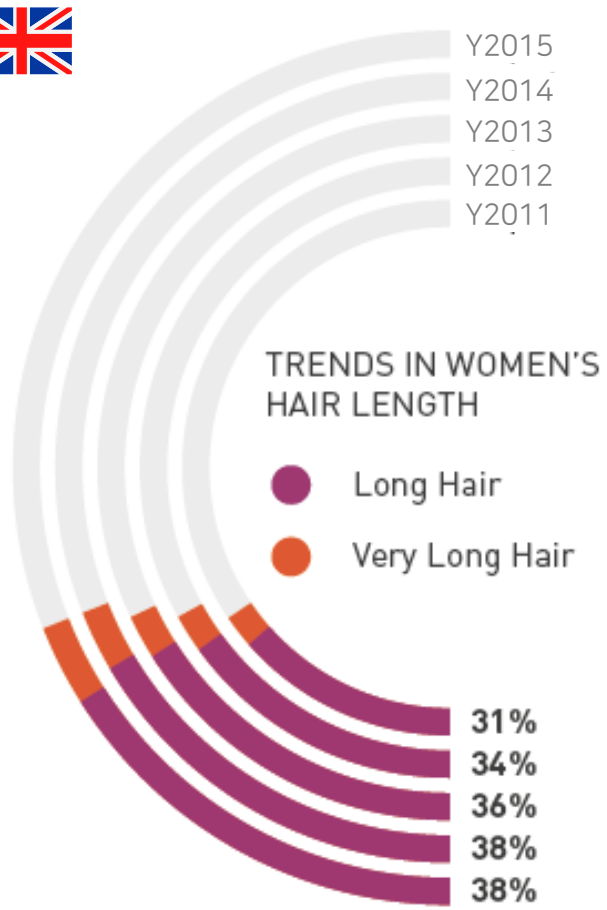
Maximizing the sensorial experience



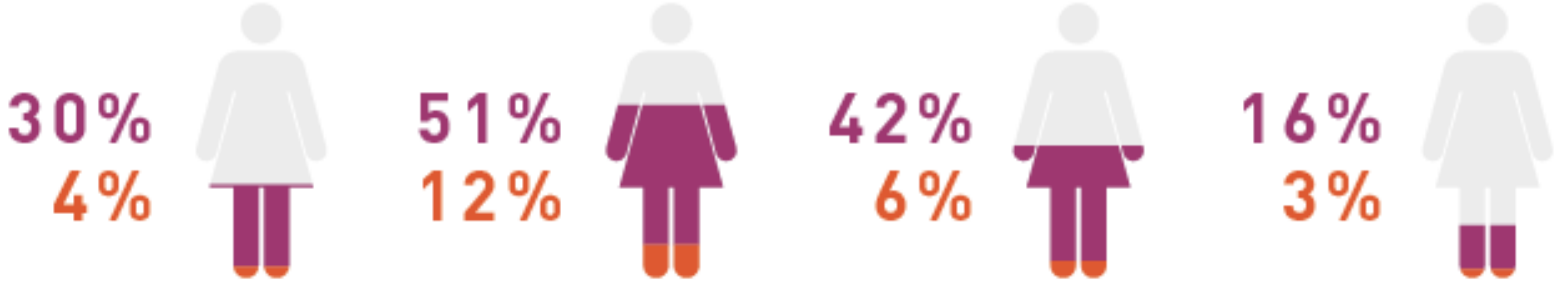
Brands become inspirational want to sharable me

MICRO MOMENT IN BEAUTY

Consumers strive for Natural beauty in their daily lives



Younger women are significantly more likely to have long hair



68%
"Put little makeup for a natural look"

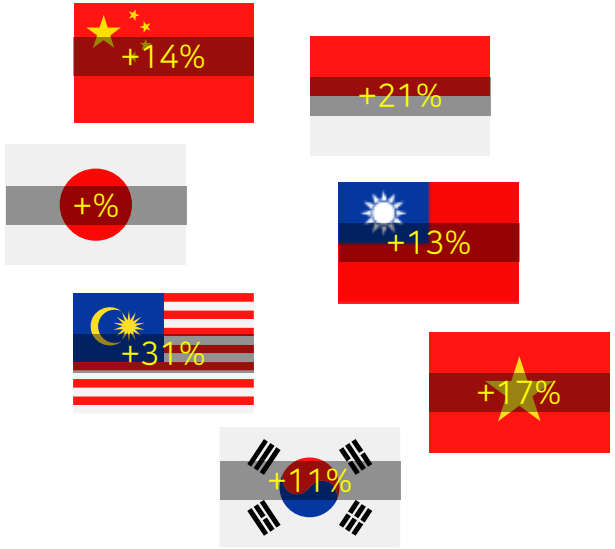
37%
"Do not trust the claim hence, do not purchase"

#nomakeup
12,804,926 posts

#naturalmakeup
767,581 posts

#wokeuplikethis
573,379 posts

But in Virtual or special occasion, makeup stands out with a statement



Face	Lip	Eye

Mask to expand as a global format

Early ~ Developing	Utilized as a trial format to add on top of the existing
Stabilization	With shortened steps, Mask acts as part of Intense care leading the growth
Late Stabilization	Under the cocooning trend, Mask acts as a regimen for healing product

Color & Care

Early ~ Developing	Trial made with product perceived as a Skin care than Make up
Stabilization	With reduced step, more caring element needs to be part of Make up
Late Stabilization	To help provide the safer perception & ingredients, growing products will have skin care benefit added into makeup

Care to Cure

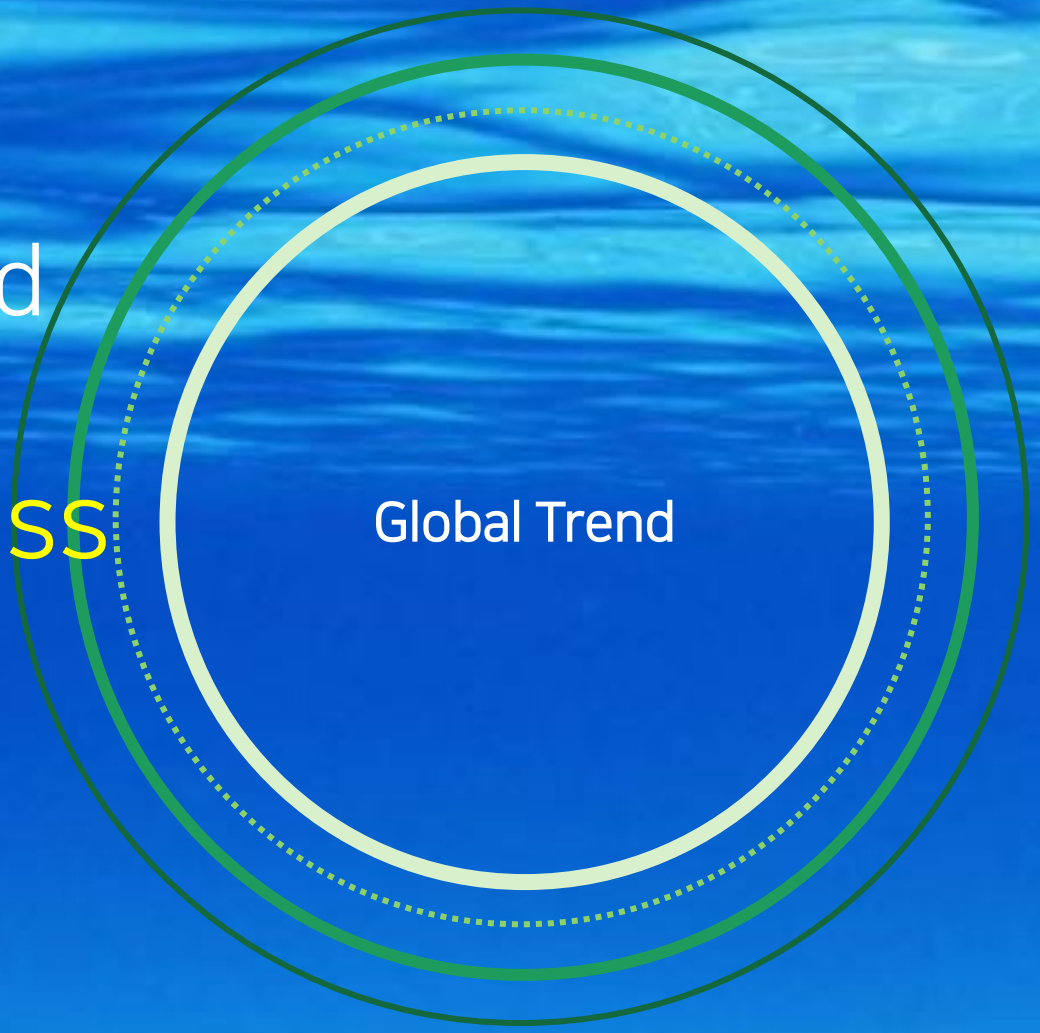
Early ~ Developing	Perceived as part of natural and safe products to try
Stabilization	Growing treatment, and sensitivity due to harsh environment coupled with retail development allows for the segment to grow
Late Stabilization	Change in retail and growing trust and need for restoration brings a strong category growth

Global Blue Ocean

Brand I stand for

Happiness

Professional Brand



DERMA

Health

REPAIR

Color Care

CUSHION

Convenience

MASK

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Unlocking LatAm Beauty Market Potential

Manira Naufal

Latam: A potential bet?

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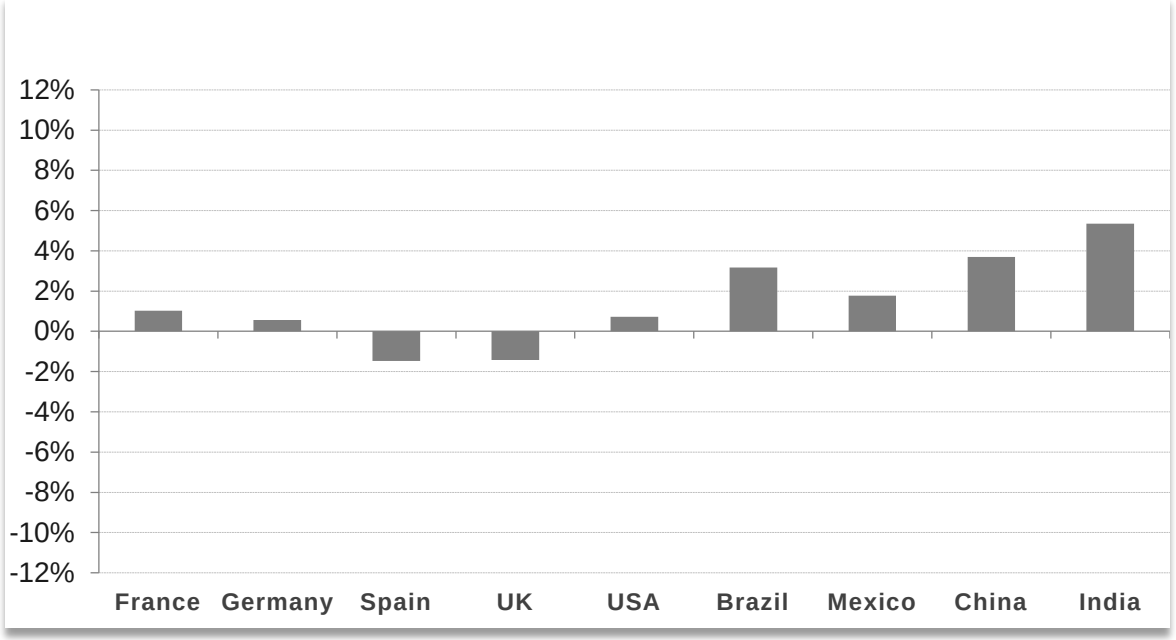
Is there a *real* growth potential in LatAm?

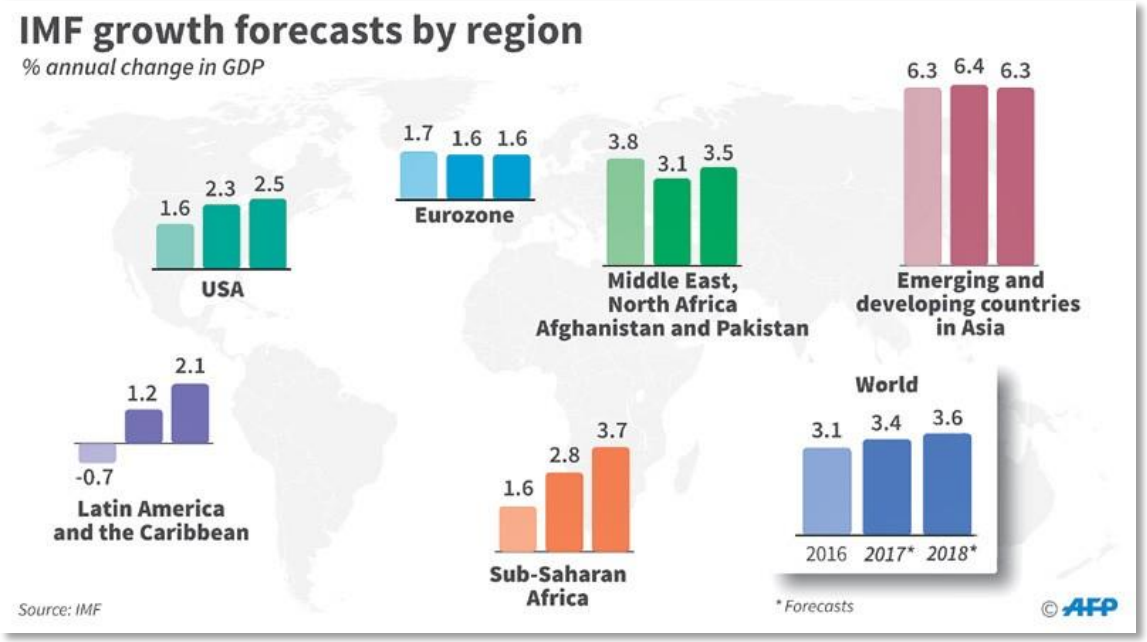
Cover 2009

Cover 2013

Even with poor economic performance, LatAm consumers basket size grows

Basket Size Contribution to FMCG– 8 years Average





Positive forecast indicates potential *mid-term* opportunity

NEW

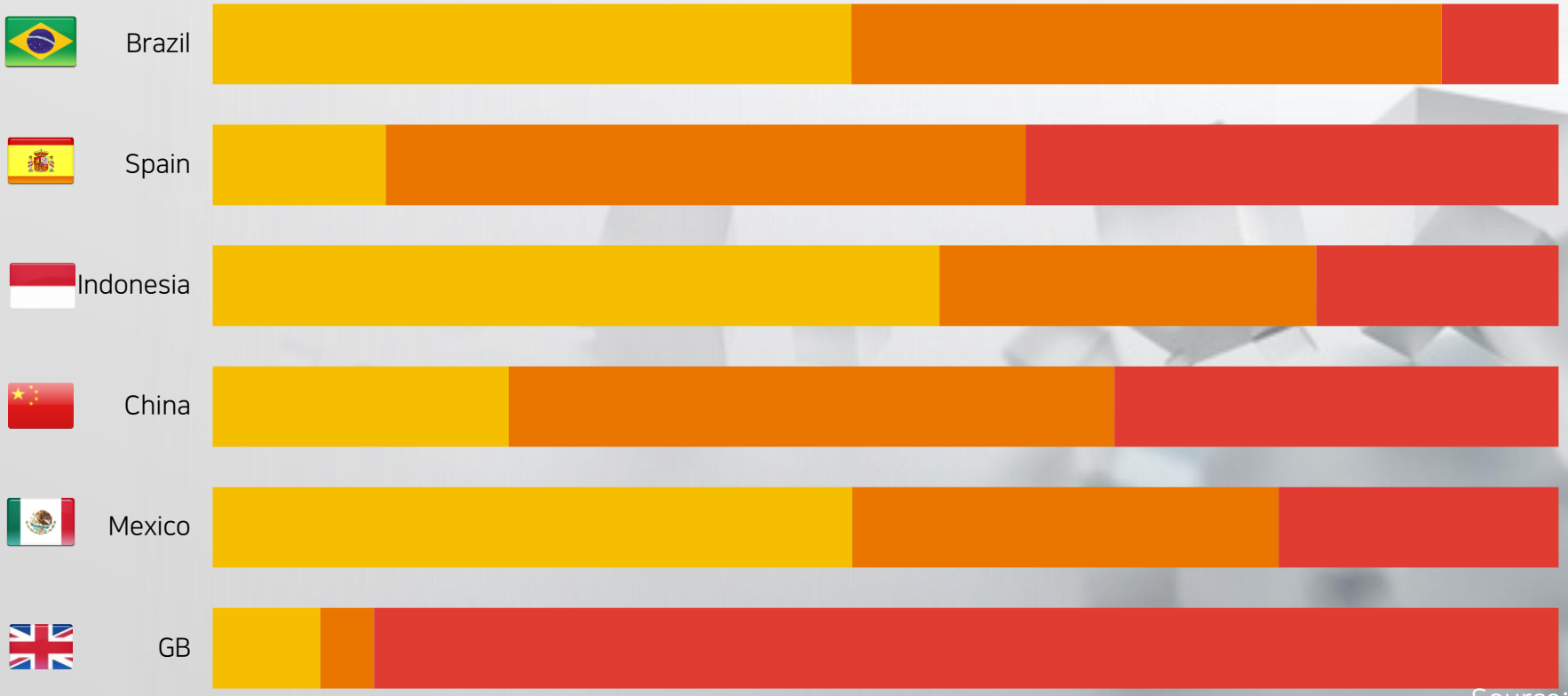
Brazil and Mexico consumers are introduced to innovation

Launches

NEW
New element to the category

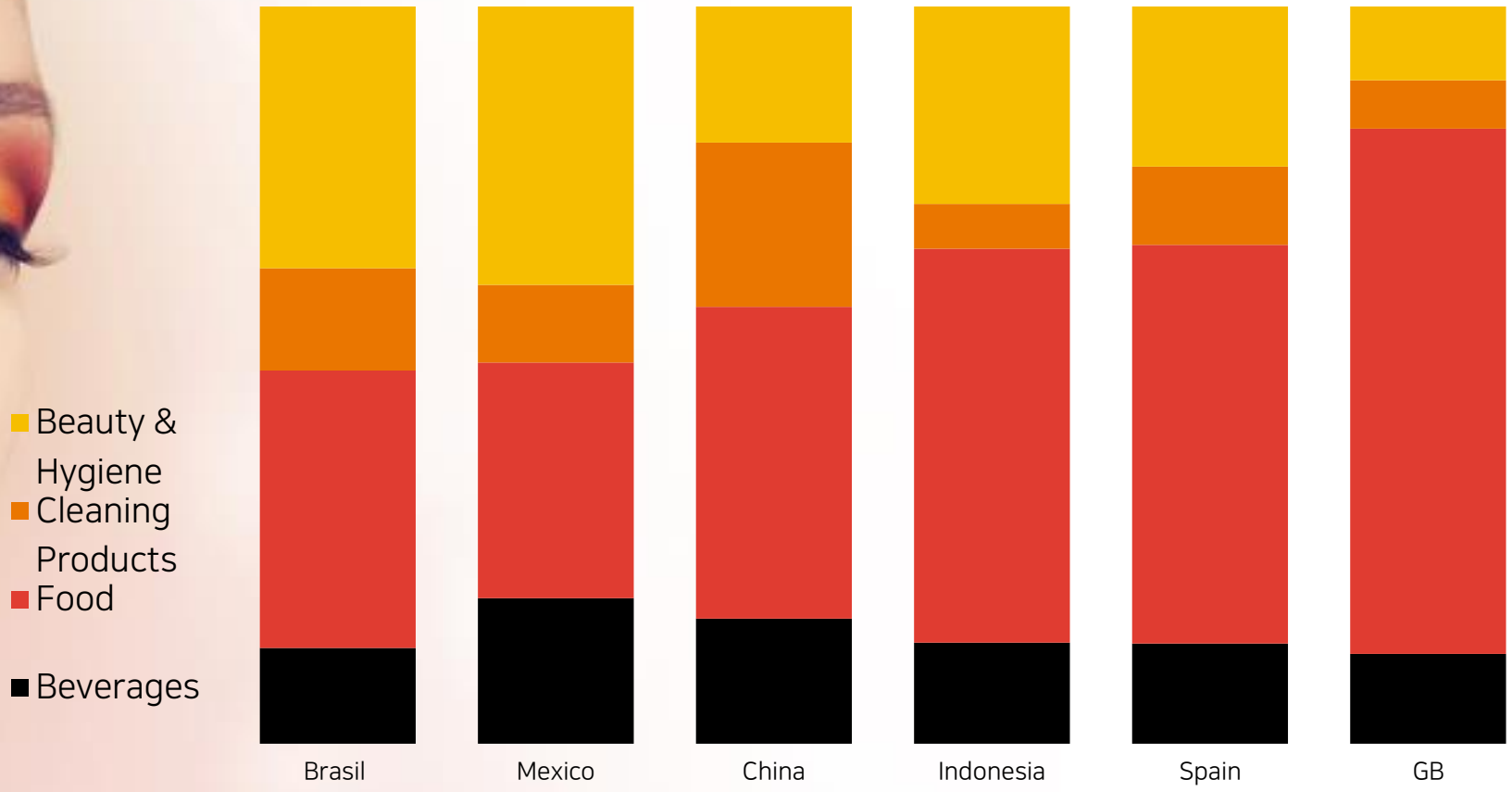
NEW COMBINATION
New Element to the brand

NOT NEW
New product withour innovation



Source: NPD Kantar Worldpanel
%Launches

B&H is the most innovative segment in Brazil and Mexico



Surce: NPD Kantar Worldpanel

LatAm: A bet for the Future

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Gisele Bundchen
Brazilian Model

Jennifer Aniston
American Actress

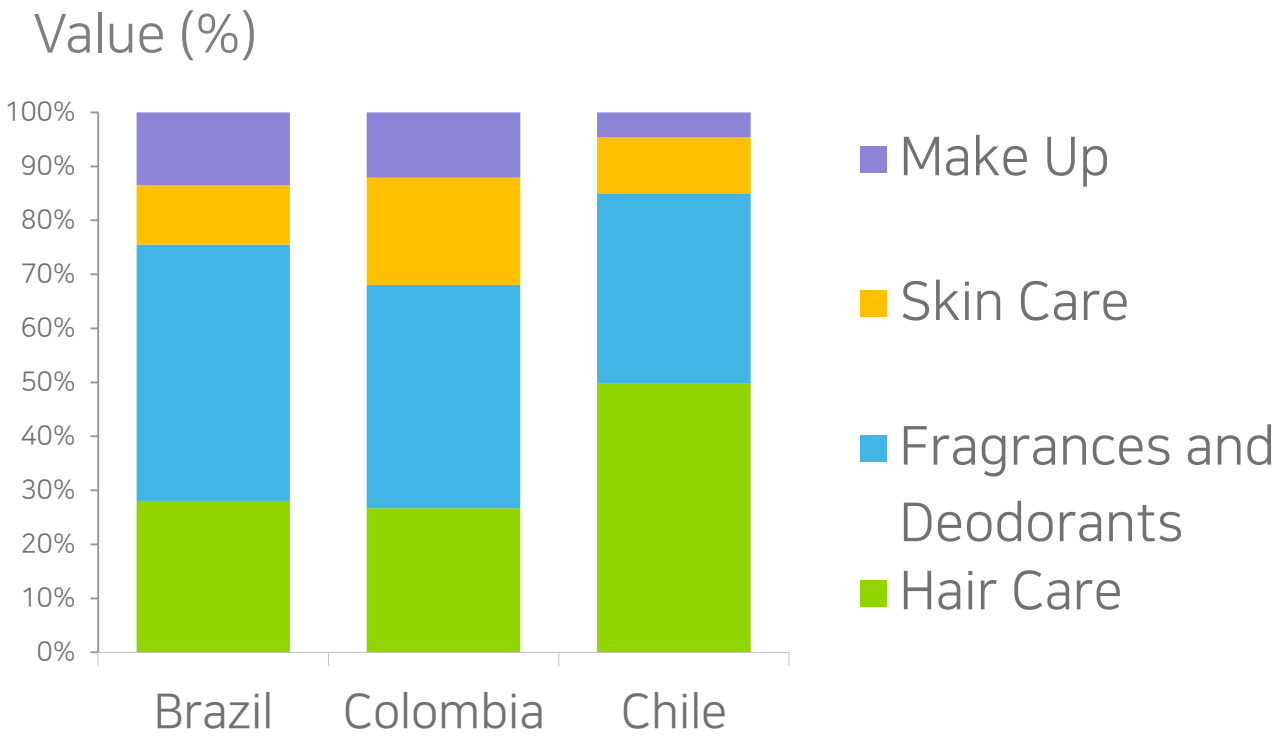
Emma Watson
British Actress

Song Hye-Kyo
South Korean Actress

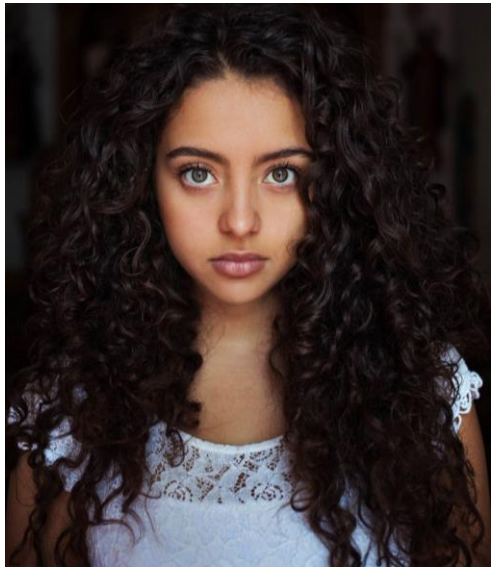
Beauty Brands winning strategy in LatAm

Does my brand really need a local adaptation in LatAm?

LatAm consumers Beauty Priorities is different



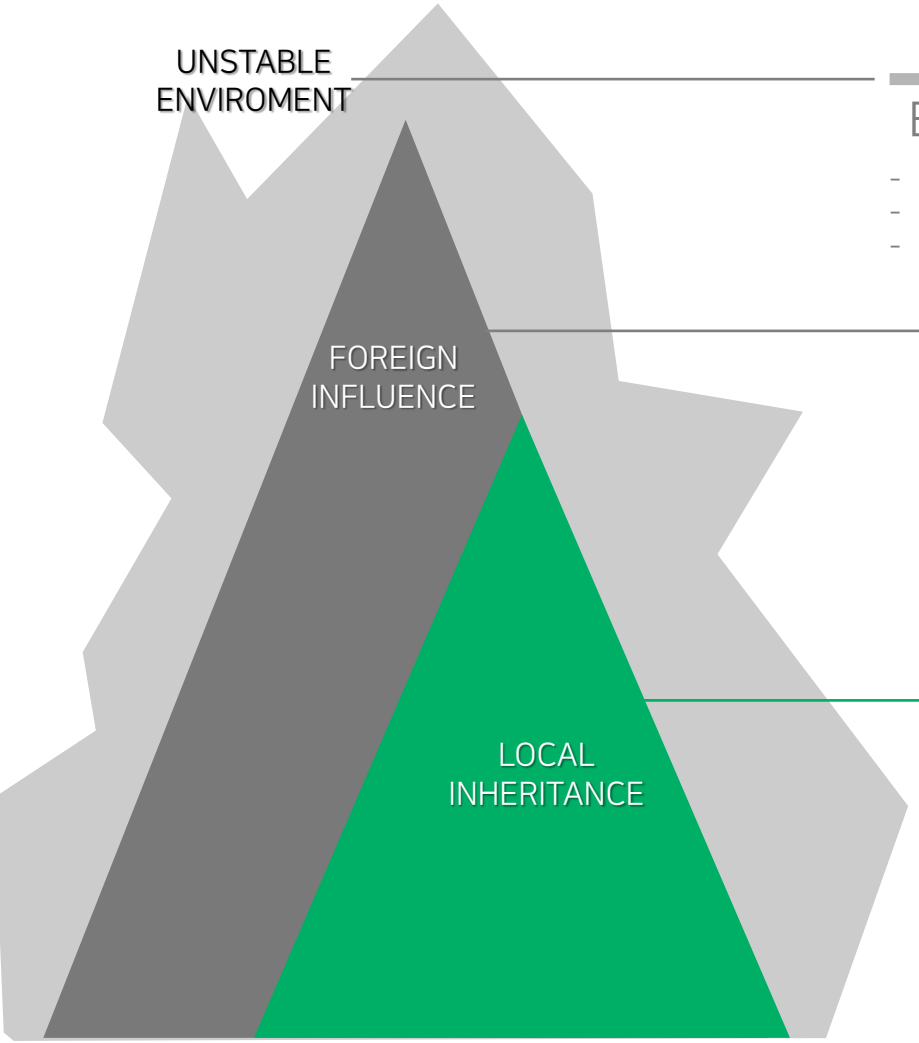
Latin America is extremely **diverse**



Skin needs, types and tones **varies extensively**

High ethnic mix resulted in **stronger skin**

What shapes LatAm consumers mindset?



Economy

- Inflation
- Unemployment
- High Tax

Infra-Structure

- Barriers to e-Com
- Regulatory process

Language

- Spanish
- Portuguese

Technology

- Local products have limitations
- Import products are too expensive
- Not familiar with latest innovation

Beauty Standard

- American and European beauty idealized
- Whitening process

Popular Wisdom

- Beauty Recipes

Local Traditions

- Diet
- Fresh Feel

LatAm Consumer Mindset

SHORT TERM PROBLEM FIXER

RECOGNIZES FOREIGNERS AS SUPERIORS

MAINTAIN LOCAL TRADITIONS

SHORT TERM PROBLEM FIXER

Especially in beauty, consumers look for fast fix instead of preventive solutions

Total Plastic Surgery

Rank	Country	Total Cosmetic Procedures
Gold	USA	4,042,610
Silver	Brazil	2,324,245
Bronze	South Korea	1,156,234
4	India	935,487
5	Mexico	907,913
6	Germany	617,408
7	Colombia	548,635
8	France	488,718
9	Italy	418,760

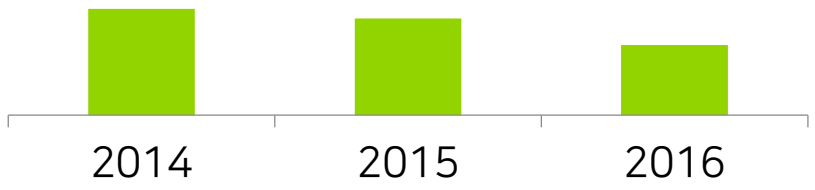
Eyelid

Rank	Country	Total Eyelid Surgeries
Gold	Brazil	143,165
Silver	USA	141,505
Bronze	South Korea	101,985

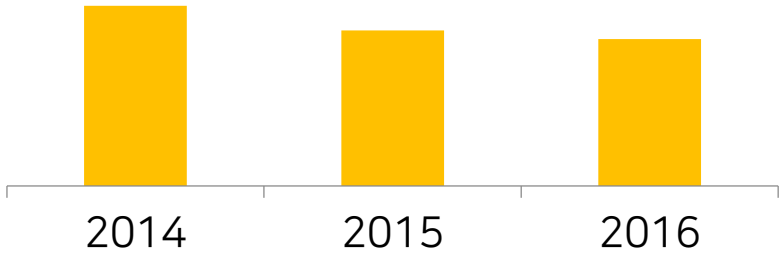
Botox

Rank	Country	Total Botox Injections
Gold	USA	1,141,595
Silver	Brazil	359,865
Bronze	South Korea	279,019

Anti-Age Face Cream – Penetration (%) Brazil



Sunscreen – Penetration (%) Brazil



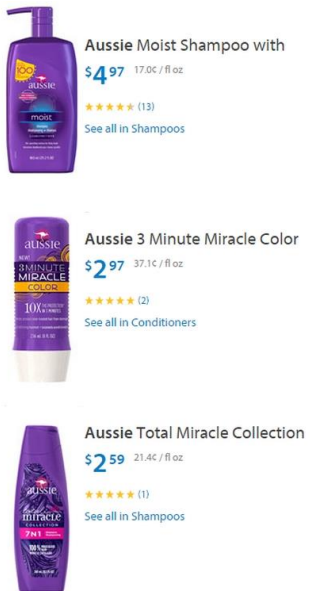
RECOGNIZES FOREIGNERS AS SUPERIORS

Imported brands are considered superior, but value equation has to be worth it

Top 10 Most chosen brands
Brand Footprint

2013 Rank	BRAZIL Brand Name	CHINA Brand Name
1	Coca-Cola	Master Kong
2	Ypê	Yili
3	Colgate	Mengniu
4	Tang	Want Want
5	Omo	Wahaha
6	Itambé	Uni-President
7	Antarctica	Shuanghui
8	Qualy	Orion
9	Maggi	Bright
10	Soya	Liby

USA



3 to 5 USD

BRAZIL

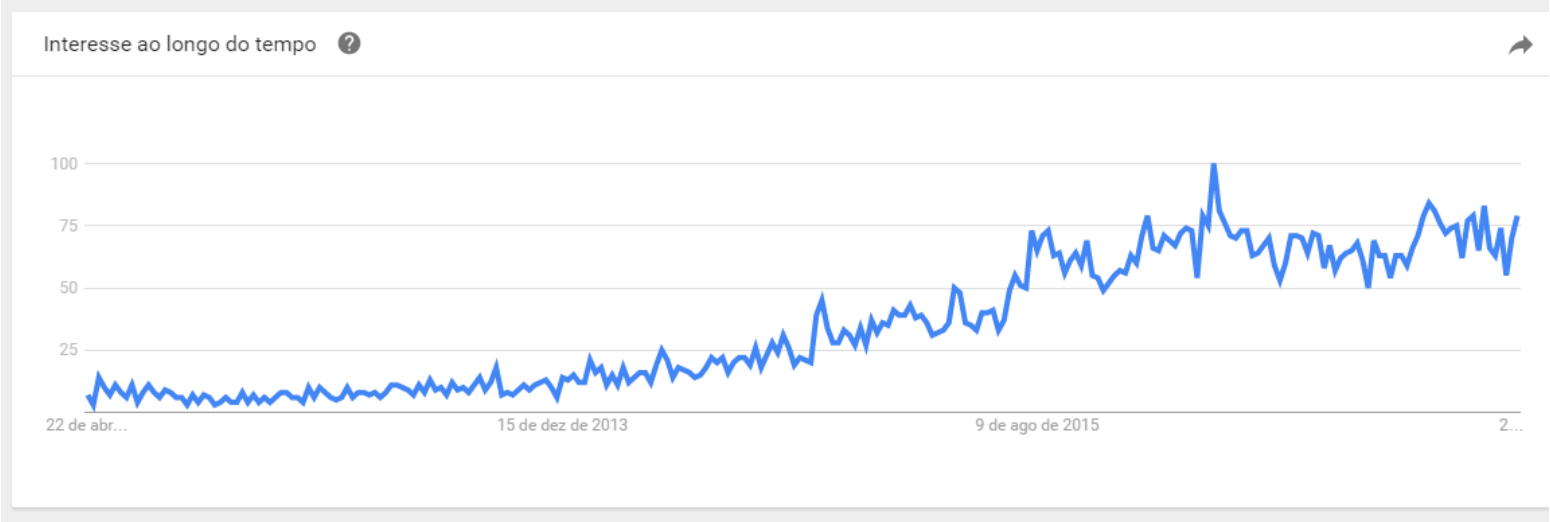
20 to 25 USD

Education about superiority and brand image are essential for **premium price to be accepted by consumers**

MAINTAIN LOCAL TRADITIONS

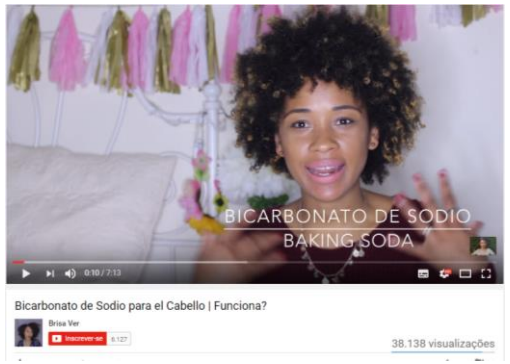
Having your own beauty recipe and hack is an old tradition that only gains force over time

Web Search Trends/ For Hair Care with vinegar in LaTAM
Source: Google Trends



Brazilian Blogger teaching how to darken foundation tone

Dominican Republic Blogger teaching how to clean Afro-Hair with Baking Soda



MANY EAGER CONSUMERS

WITH A DIFFERENT MINDSET

HAD LESS EXPOSURE TO COSMETICS

But that is changing

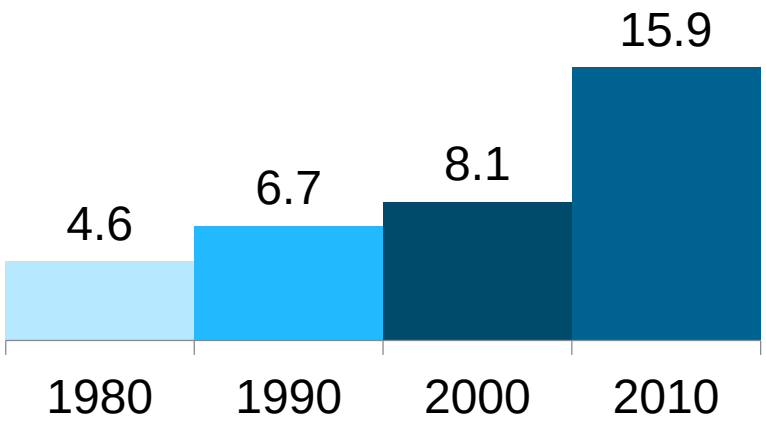
LatAm Millennials

Who are the Millennials of Latin America?

30% of Latin America population

MORE
Education

New University Students in Latin America (Millions of Students)



MORE
Income

In Brazil, Millennials have

+ 6 MM USD

in savings than the previous generation

36% have credit card debts (vs **43%** in the previous generation)

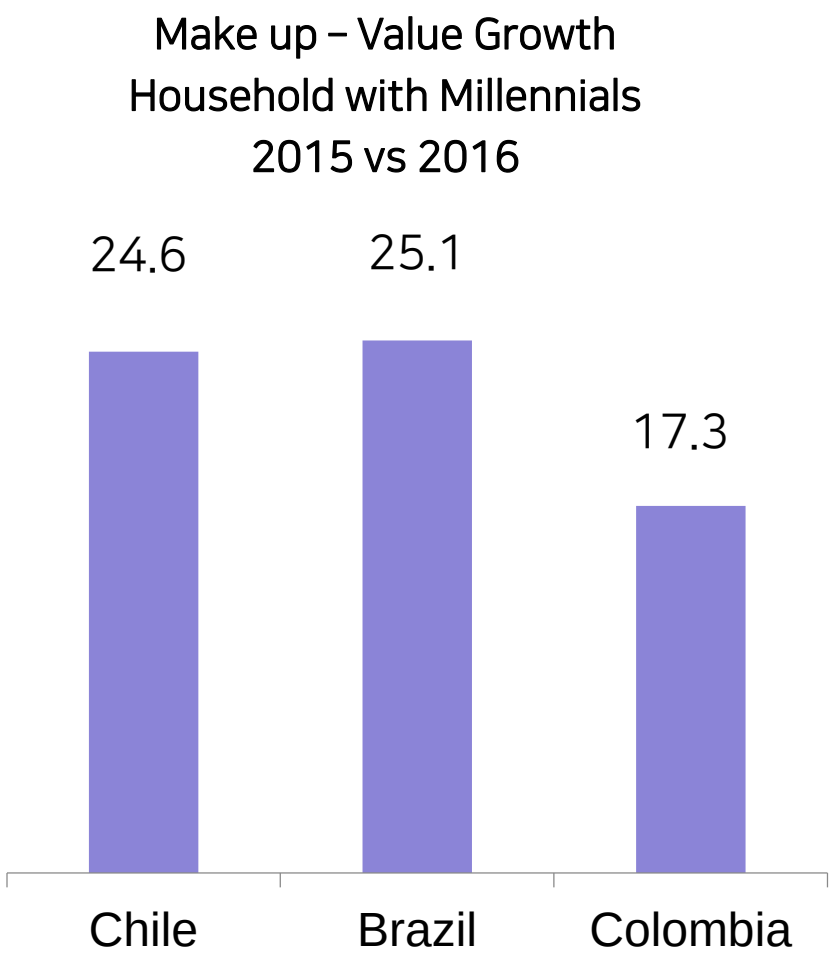
Source: Galileu

MORE
Access

Latin American Millennials Are Connected And Online

Globally, Millennials spend an average of 6 hours online each day

Digital Influencers have a key role educating consumers about categories they are not familiar with



Camila Coelho – 3 MM Subscribers
Partnership with Dior, Pantene , Misha and others

Venezuela Vlogger

Pantene Brand Ambassador – Brazilian Bloggers

Differentiated retail experience is a key element for Millennials Beauty purchase

Focused on Make Up only. Large range of colors palette. Young communication, "fun" products and custom-made kits available

Multi-Brand and Multi-Category store, where Boticario products are also available

Unlocking Beauty Market in LatAm

Reminders and Opportunities

Latin American Millennials are eager to consume

ACCESS

They had different exposure to Beauty Categories

EDUCATION

And have a different relationship with brands

INSPIRATION

europanel™

Powered by GfK and Kantar Worldpanel

EUROPEAN BEAUTY AND ITS OPPORTUNITIES

Julie Pons

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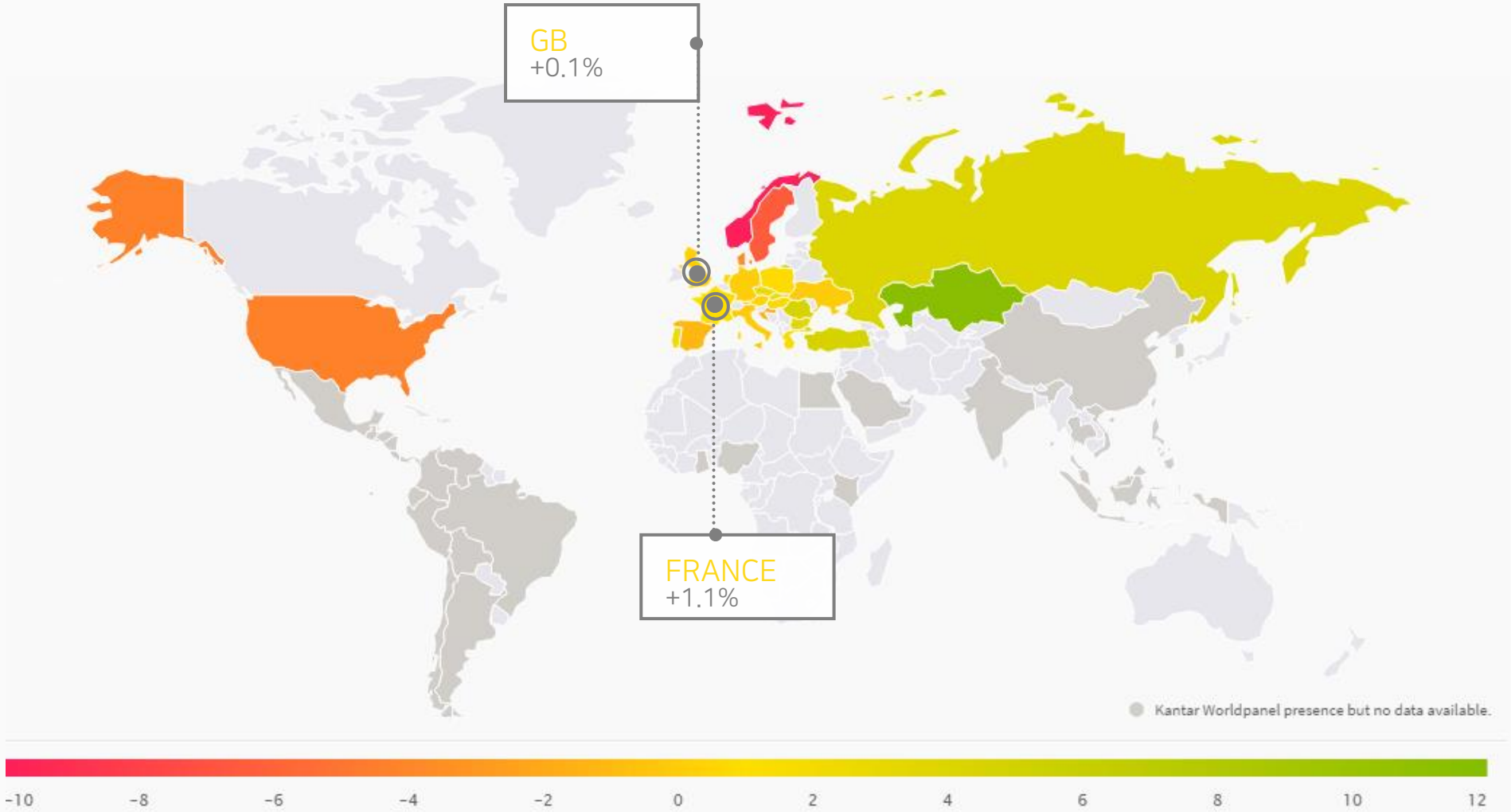
A stabilising Europe overall…



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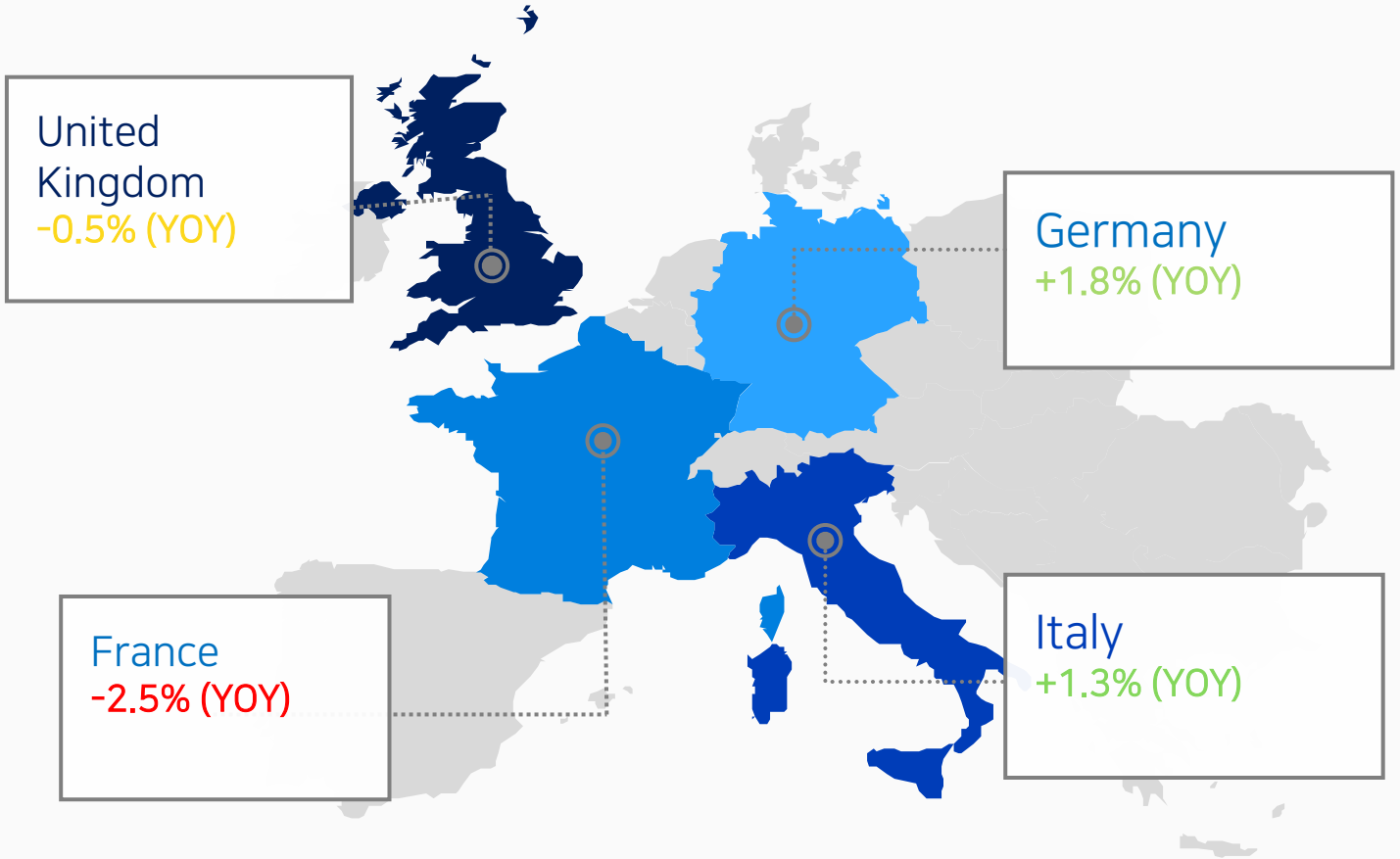
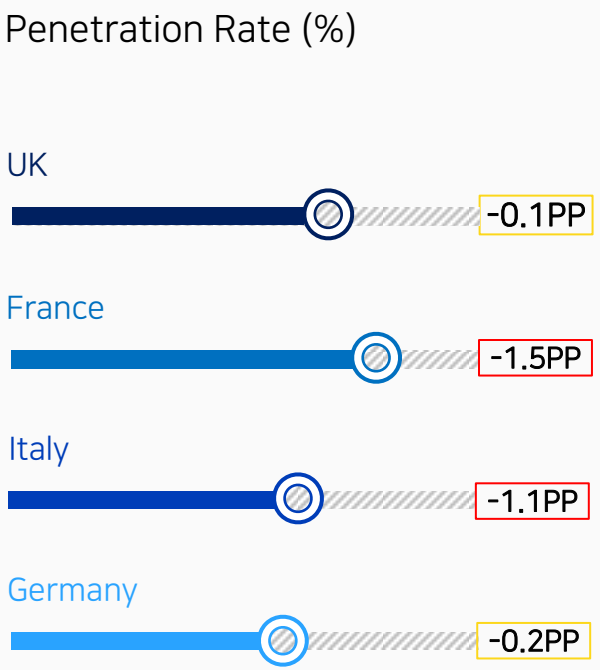
FMCG 2016 Q4 Year on Year (YOY) Value Change %

And so goes for Beauty, with a difficulty of recruitment…





VALUE
High — Low

©Europanel

Total Beauty Value actuals and YOY% growth; Penetration actuals and PP growth FY 2015. vs FY 2016

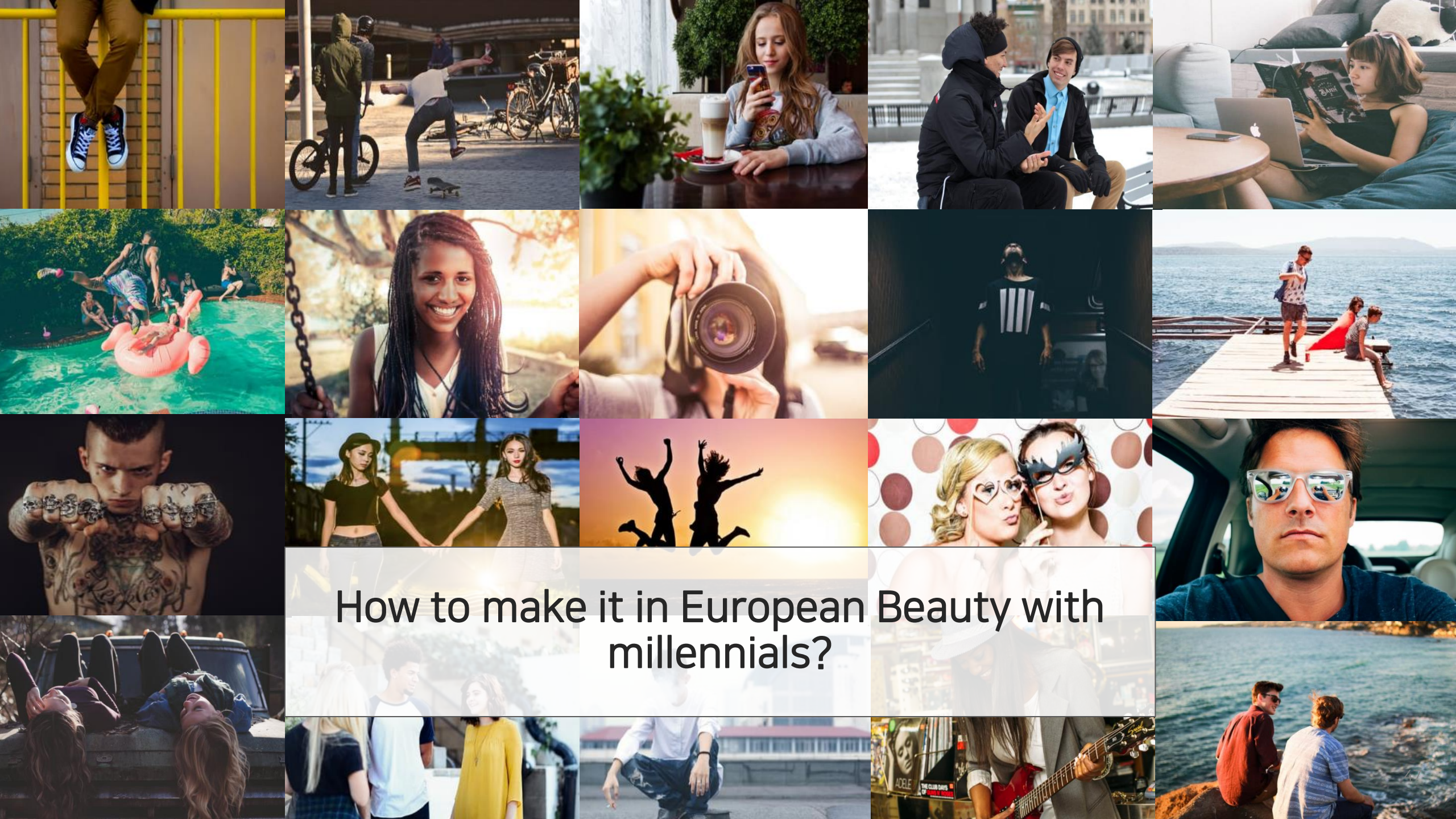
But it seems that one trend driving this decline, is younger people!

-3.4 PP

-1.4PP

©Europanel

GB & FR | Millennial Beauty Penetration change (in PP) FY 2015 vs. 2016



How to make it in European Beauty with millennials?

AGENDA

1. Play either the price or the experience.
2. Keep it natural… Or be bold!
3. Innovate, and create noise

© Kantar Worldpanel

AGENDA

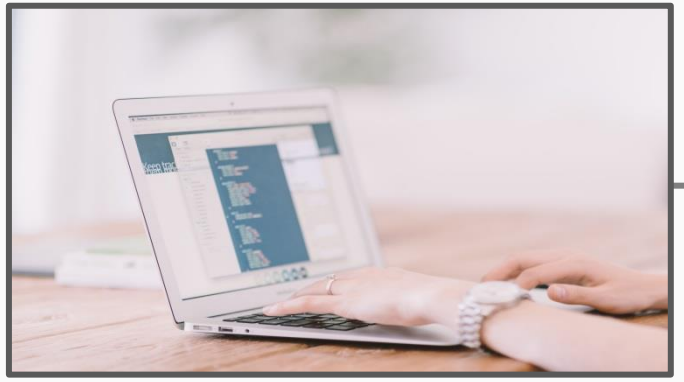
1. Play either the price or the experience.
2. Keep it natural… Or be bold!
3. Innovate, and create noise

© Kantar Worldpanel

Multi-channel is becoming essential… but some more than others!

FRANCE

+5.8%

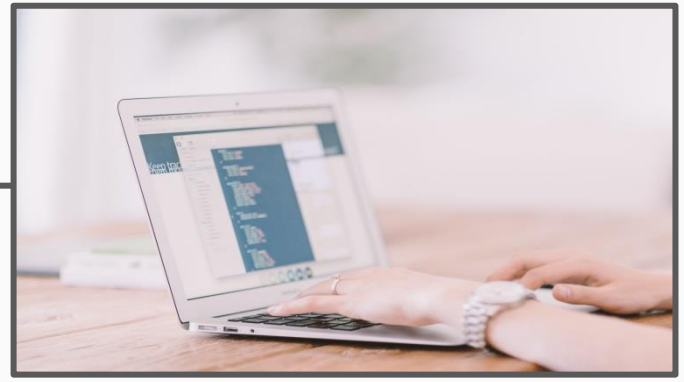


+2.9%

GB

+44%

+12%



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GB & FR | Total Beauty Value YOY growth in channels FY 2013 vs. 2016

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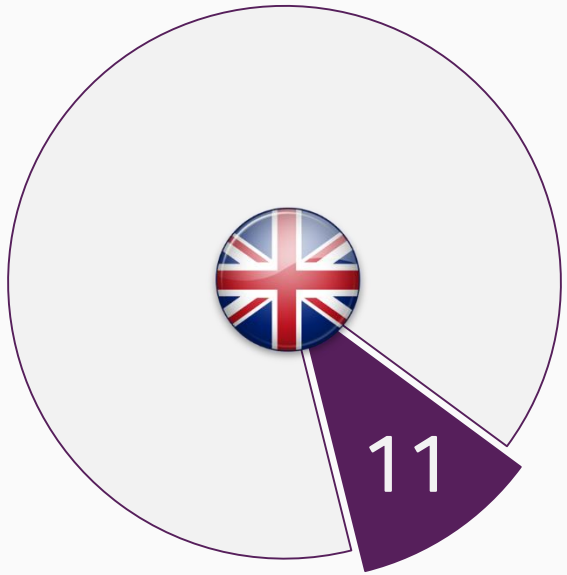
CONSUMER EXPERIENCE IS BECOMING KEY!

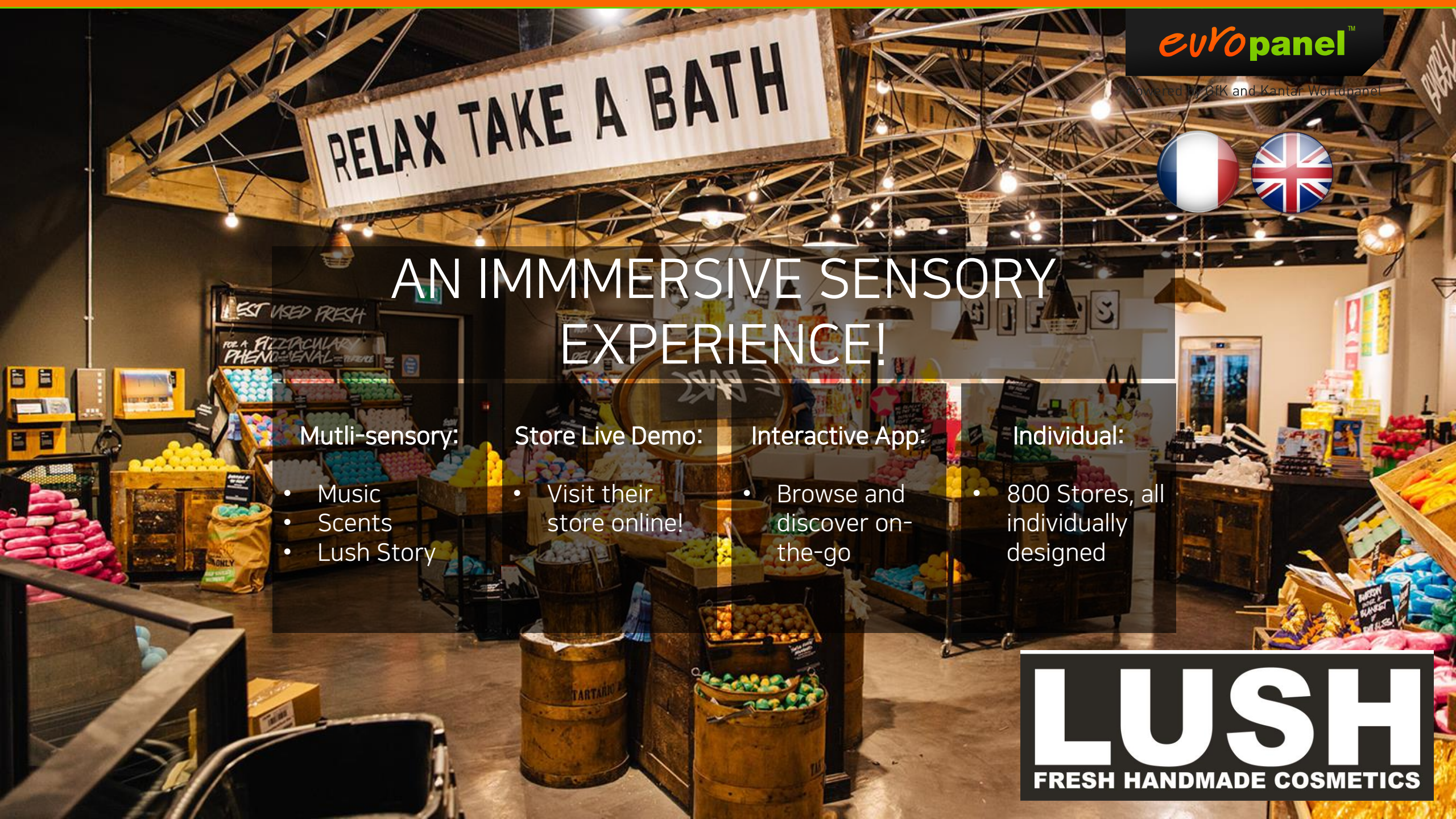
©Europanel



+5.3%

% of population buy in stand-alone stores..

GB | FY 2016 Penetration% of stand-alone stores and YOY buyers growth vs. 2015



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AN IMMERSIVE SENSORY EXPERIENCE!

Mutli-sensory:

- Music
- Scents
- Lush Story

Store Live Demo:

- Visit their store online!

Interactive App:

- Browse and discover on-the-go

Individual:

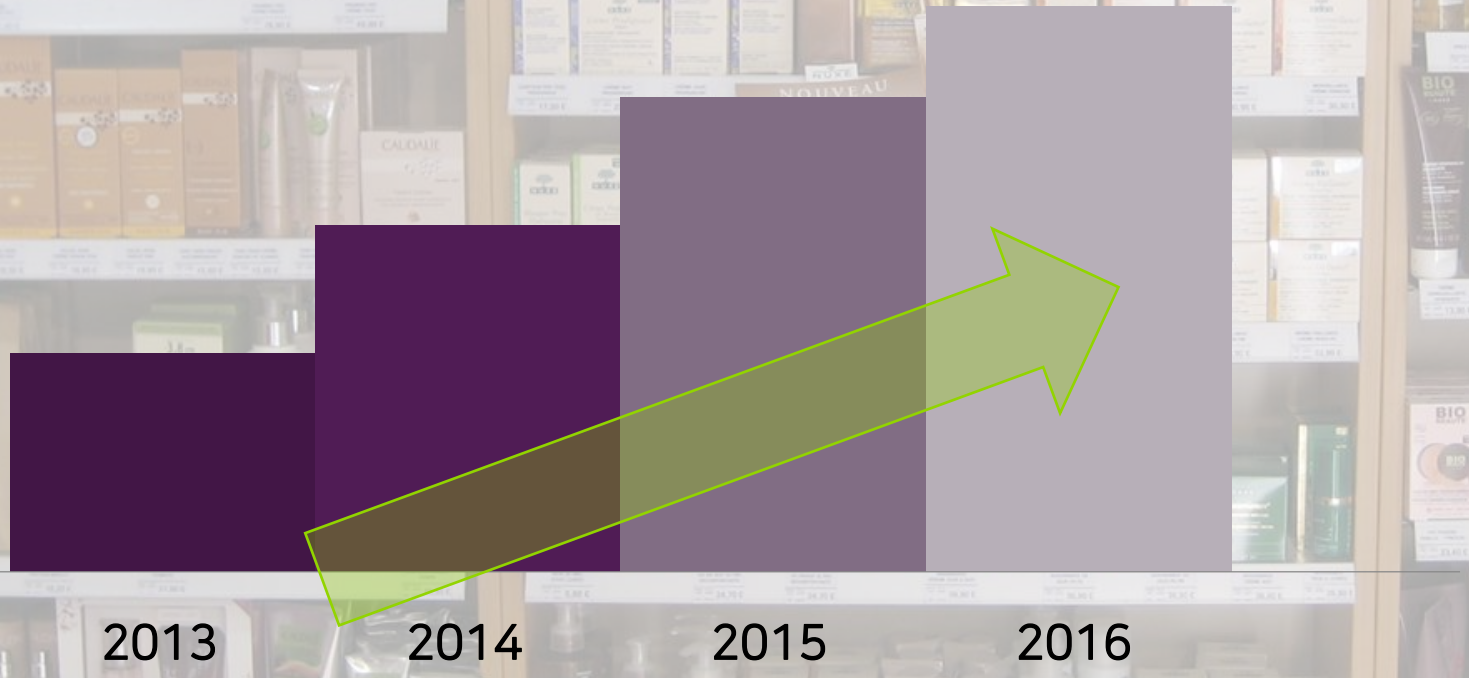
- 800 Stores, all individually designed

LUSH

FRESH HANDMADE COSMETICS

The pharmacy channel, the right offer at the right price!

Pharma value share (%) within Beauty in France



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SEPHORA

Sephora, already raising the EU Game

+10.5PP with 15-24YO
for Sephora brand

FR | Sephora Brand in Total Beauty Penetration Points growth of FY 2014 vs. FY 2016 within 15-24 age group

AGENDA

1. Play either the price or the experience.

2. Keep it natural… Or be bold!

3. Innovate, and create noise

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© Kantar Worldpanel

The overall PC routine is registering significant regime decline!

80 million
fewer PC occasions

101 million
fewer PC occasions

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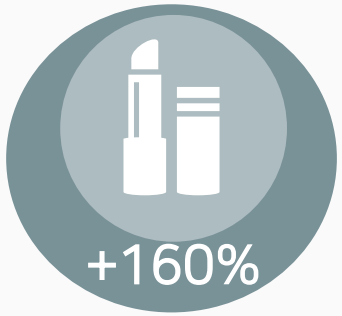
GB & FR | Average number of weekly personal care occasions FY 2012 vs. FY 2016

Particularly as natural look rises…

Google searches on "natural look" evolution over time

Index vs higher volume

% change 2016 vs 2012



DIY beauty products

Natural beauty products

Natural homemade deodorant

DIY face peel

Home natural toothpaste

©Europanel

Source: Google Trends – all countries

In Skincare, several reasons drive this decline!

Cleansing is driving a **devaluation** of the category

Multifunction, **diminishing** the number of product purchased for the **beauty routine**

But **masks** show significant **potential** (FY 2016)

1.2 Mln buyers

150 K buyers

©Europanel

DESPITE THE CHALLENGES **CLINIQUE SHINES** BY CHOSING THE **RIGHT INFLUENCERS** TO TALK TO MILLENIALS :

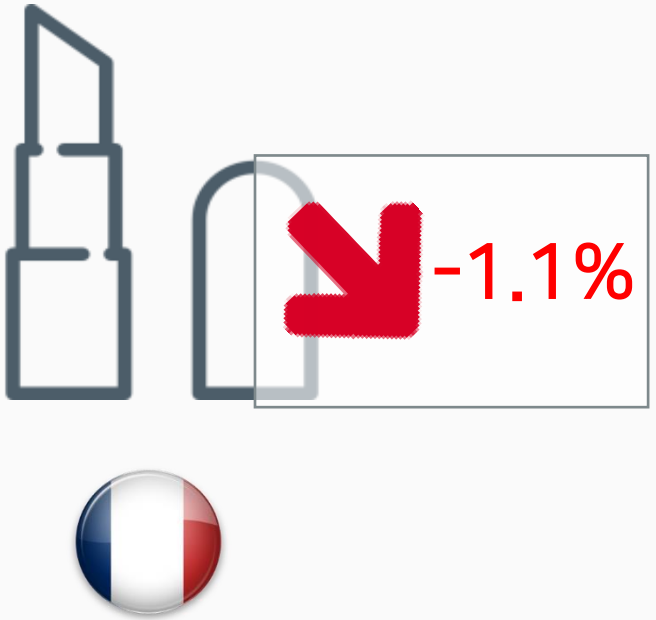
- **#Face Forward Campaign** to add youthful quick to a rather mature brand image
- **Minimalist** ad – to reflect the current trends
- How:
  - **Instagram**
  - **Youtube**

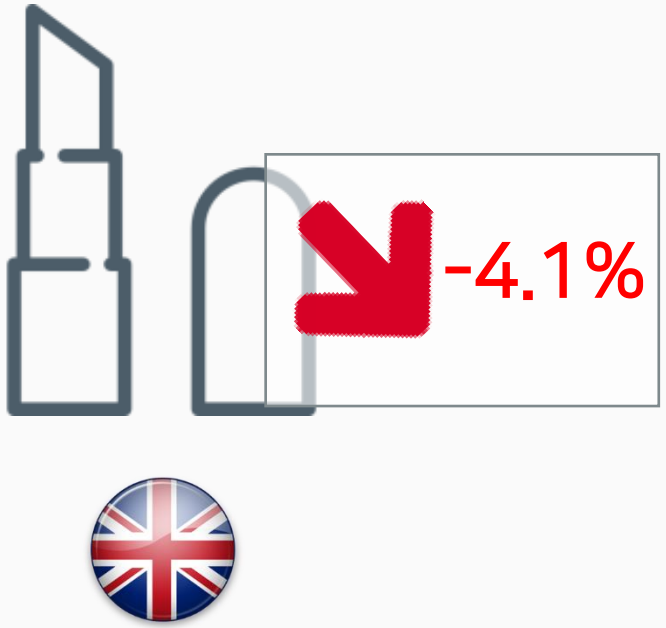
+1.1pp with 0-24
+0.4pp with 25-34

GB |Clinique Penetration point growth within Skincare FY 2015 vs. 2016

While for make-up, the big emphasis in on simpler routine!

Total Volume (units)





©Europanel

FR & GB | Total volume in units for Makeup YOY growth% FY 2015 vs. FY 2016

L'UFC-Que Choisir pointe 400 cosmétiques contenant des substances indésirables

Science of skincare: why you should be using azelaic acid

24 Nov 2016, 6:00am

Fabriquer ses cosmétiques naturels et bio

IKEA

01-janv.-2016

Commencez l'année avec de nouveaux produits de beauté, entièrement naturels, bio et faits maison ! Mia et Jakob sont étudiants. Ils nous livrent leurs recettes maison de shampooing, déodorant et même spray de coiffage.

Comment Faire | Eco-Gestes | Idées À Petits Prix | Salle De Bain

Les actifs qu'il faut éviter en cosmétique

Femme actuelle

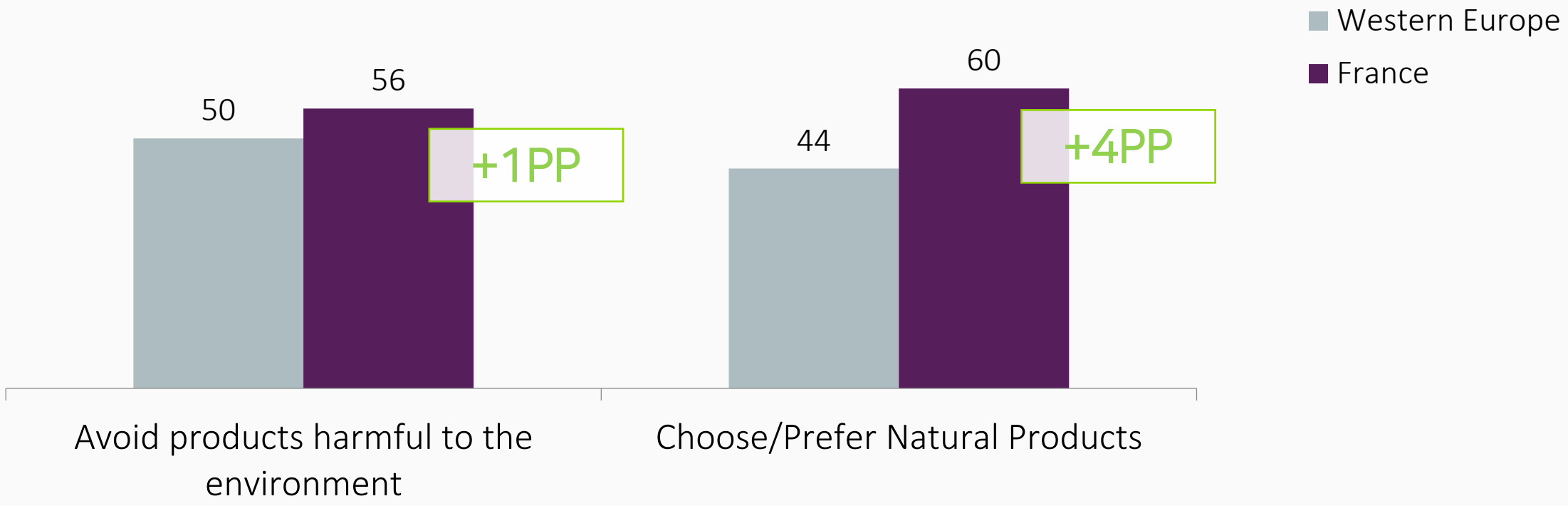
Give your cosmetics a safety makeover by using this simple website

theguardian

©Europanel

Although impacting all EU, the French are the most environmentally conscious!

% of people agreeing with this statement:



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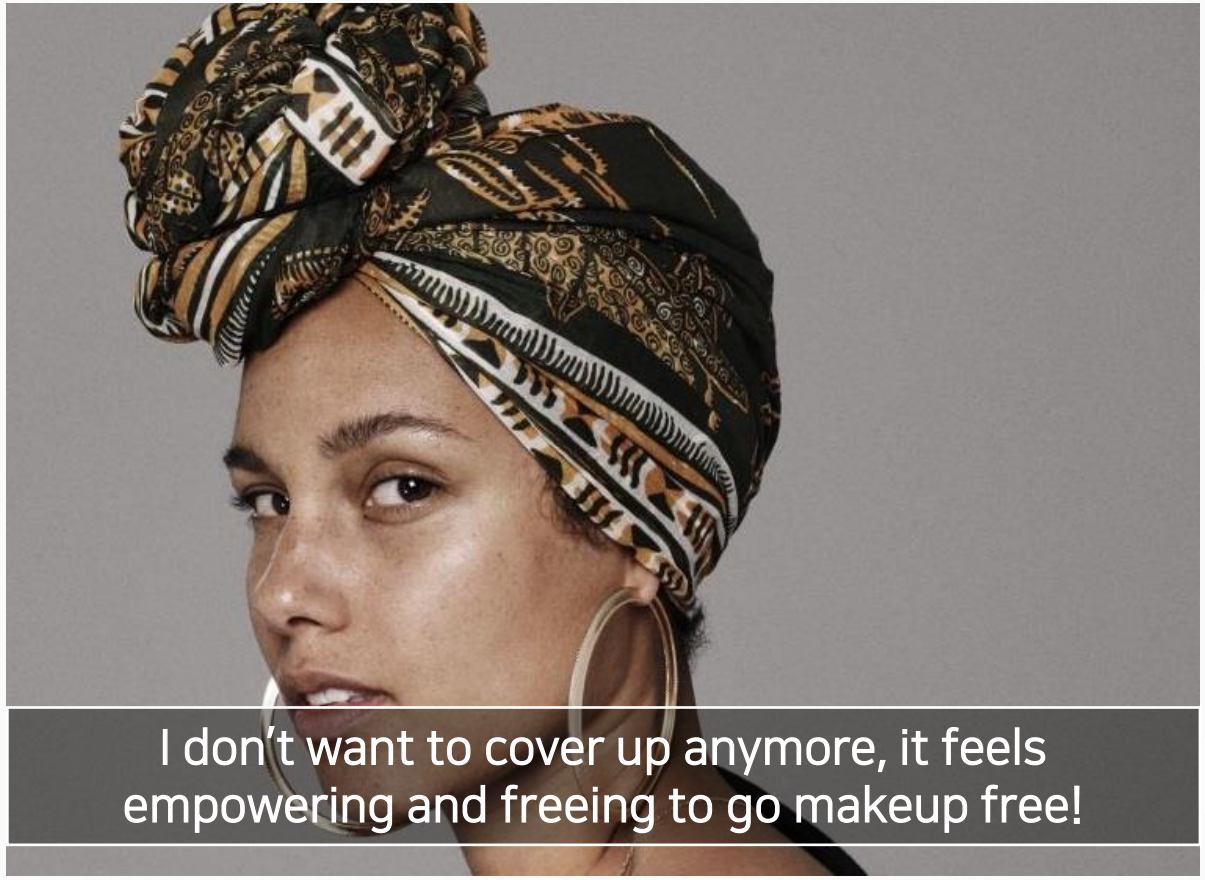
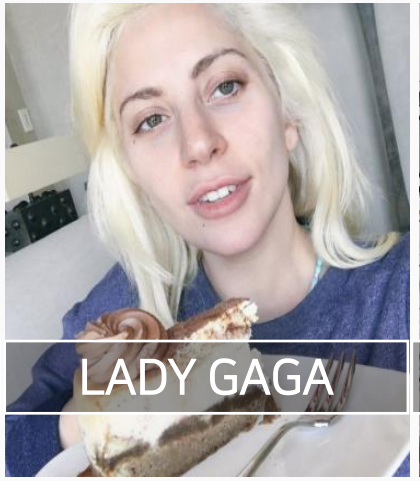
Think Dirty – The app that detects dangerous products!

©Europanel

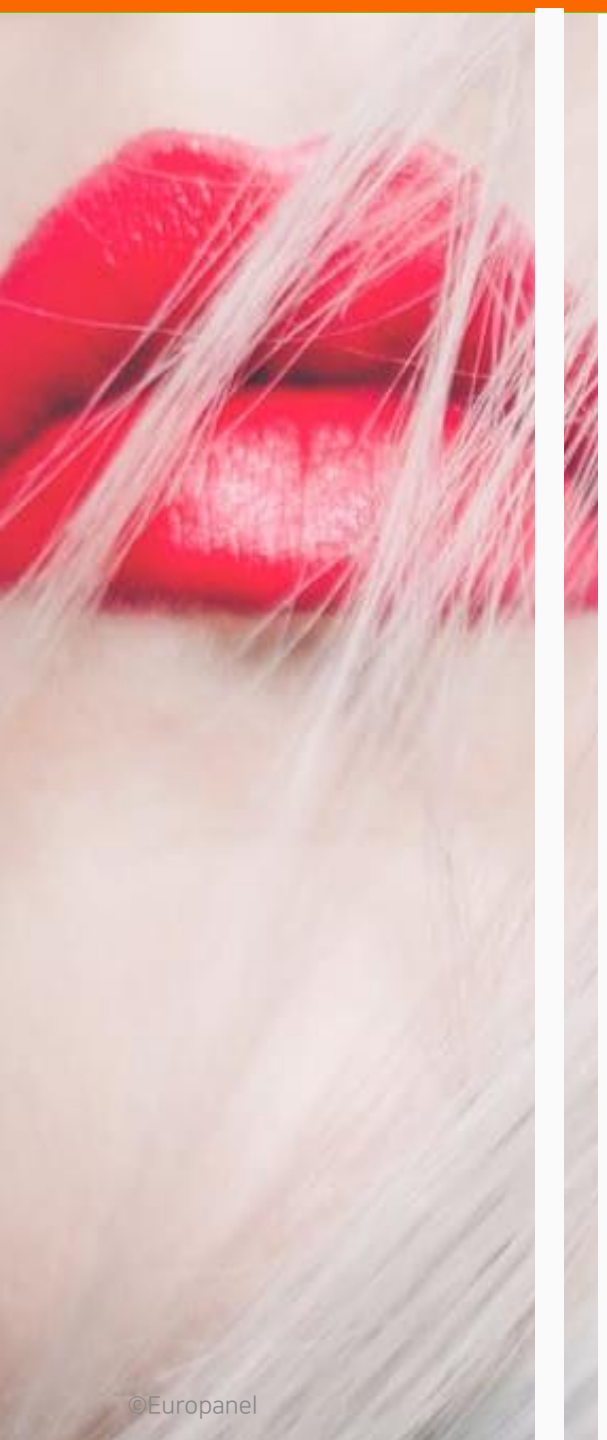
Natural Beauty is supported by Fashion Leader…





#nomakeup 13,681,964 posts	#naturalmakeup 767,581 posts	#wokeuplikethis 573,379 posts

©Europanel



Powered by GfK and Kantar Worldpanel

But one segment defies the trend : LIP!

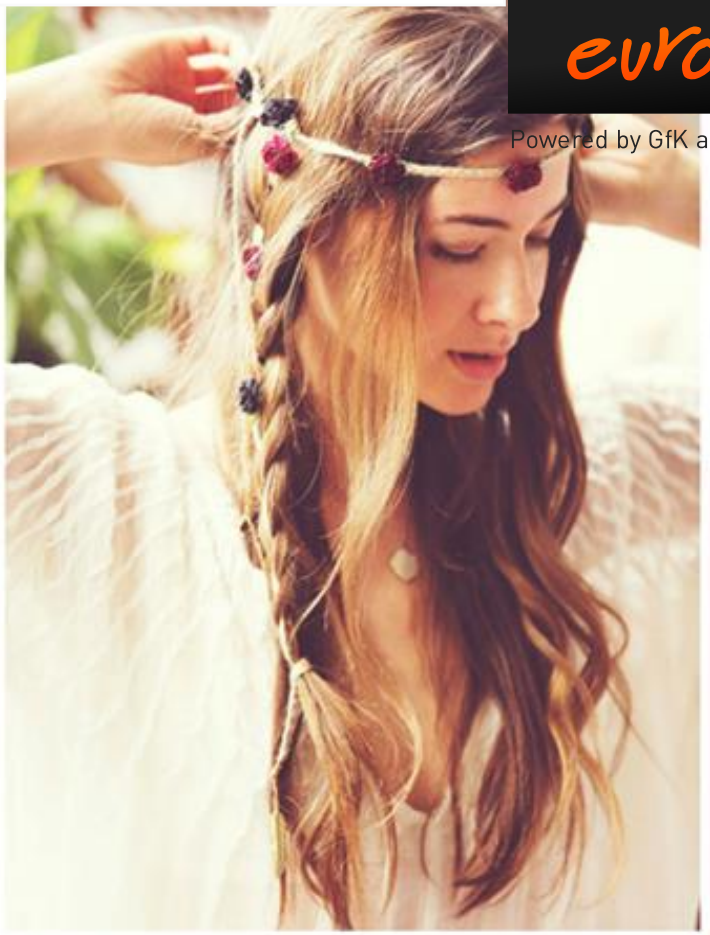
+36% in GB

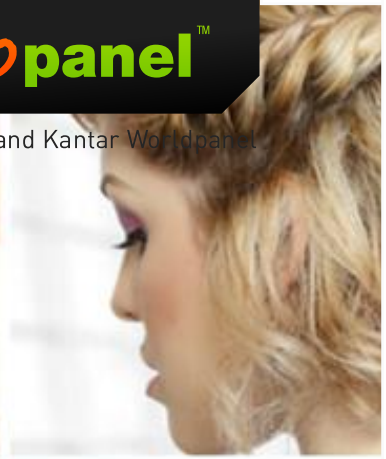
+14% in France

©Europanel

GB & FR | Lip Category Value YOY% Growth FY 2013 vs. FY 2016

Which brands make it with Millennials?





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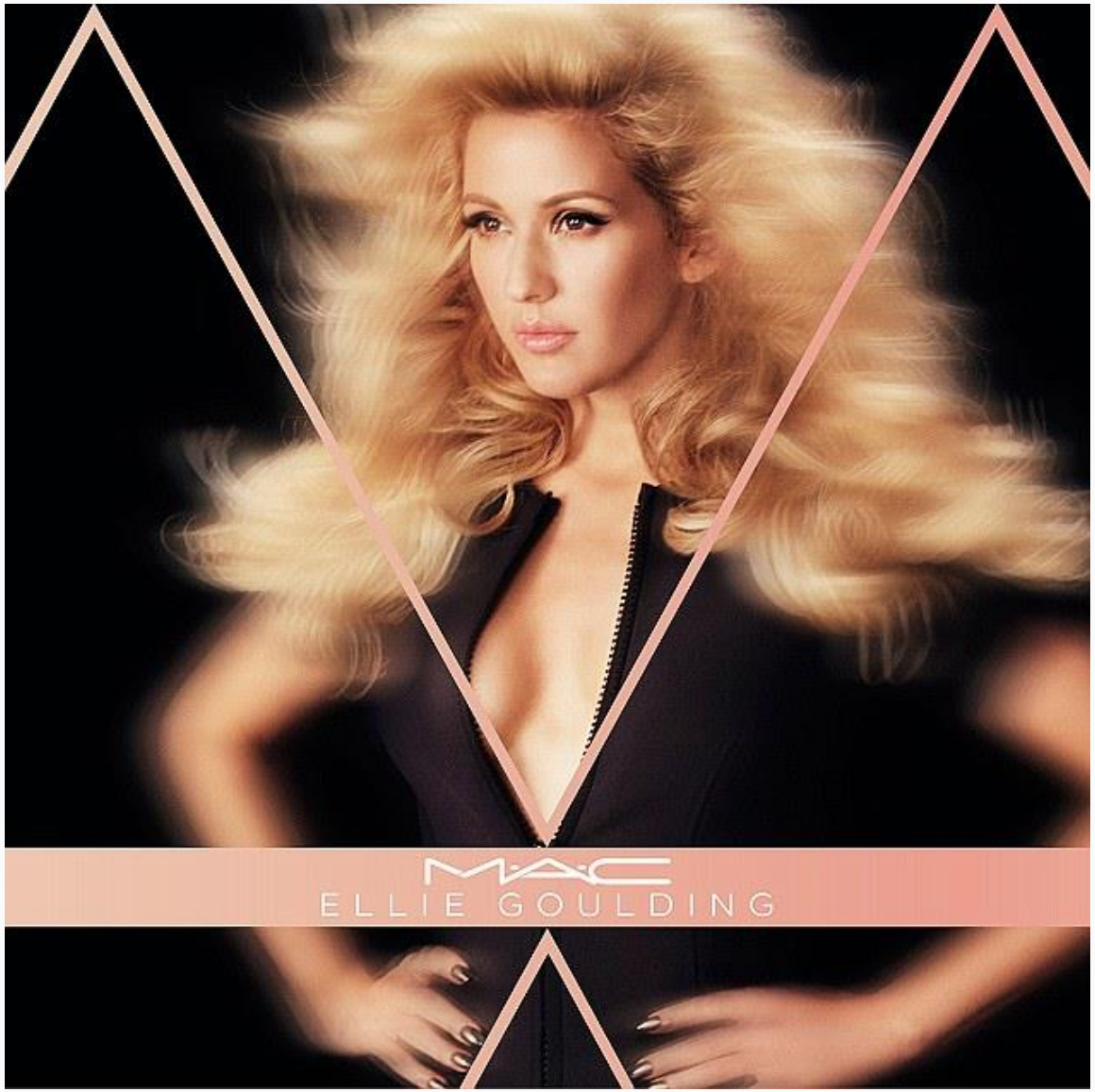
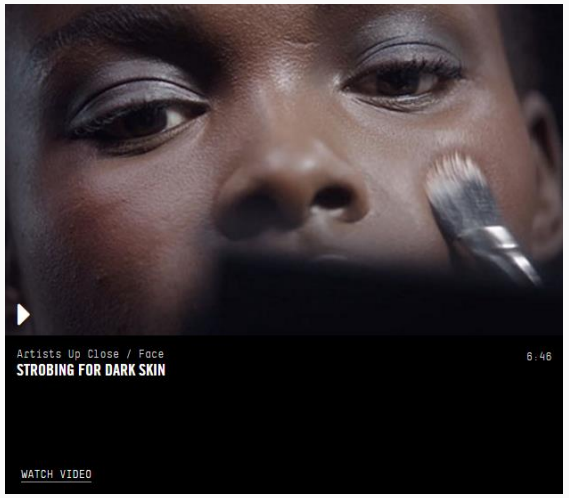
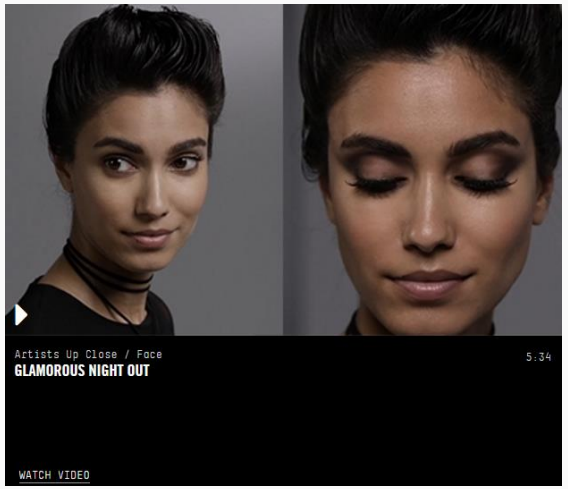
MAC

+450K WITH 0-24
SINCE 2013







MAC WHAT'S NEW

MAKEUP SERVICES

GB | MAC Makeup Buyers actual growth FY 2013 vs. FY 2016

KIKO
MAKE UP MILANO

+500K BUYERS IN 2015

FRANCE | KIKO Buyers growth (actuals) within Makeup FY 2014 vs. 2015

YVES ROCHER

+500K Millennials

in 1 year

FRANCE | Yves Rocher Buyers growth (actuals) within Makeup FY 2014 vs. 2015

AGENDA

1. Play either the price or the experience.

2. Keep it natural… Or be bold!

3. Innovate, and create noise

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There are **2.3 mln fewer fragrance buyers** in 2016 vs. 2013

GB & FR Fragrance Buyers lost (actuals) between FY 2013 vs. 2016

Calvin Klein

+ 125k Shoppers
inc. 30k Millenials

+ 259k Shoppers
inc. 132k Millenials

Core Brand

Limited Edition

NPD

GB & FR Calvin Klein Fragrance Buyers won (actuals) between FY 2015 vs. 2016

Target Millennials:

- Advertising
- Products available in 30, 50 and 90 ml
- Gift boxes
- Engraving

+ 129k new shoppers in 2016 /inc. **75k Millenials**

©Europanel

GB YSL Fragrance Buyers won (actuals) between FY 2015 vs. 2016

In conclusion, what works with Millennials?

MAKE IT SPECIAL

ALLOW THE INDIVIDUAL

FOLLOW THE LATEST TREND

BE BOLD

BE REAL

©Europanel

But also, base your communication on your Korean Expertise!

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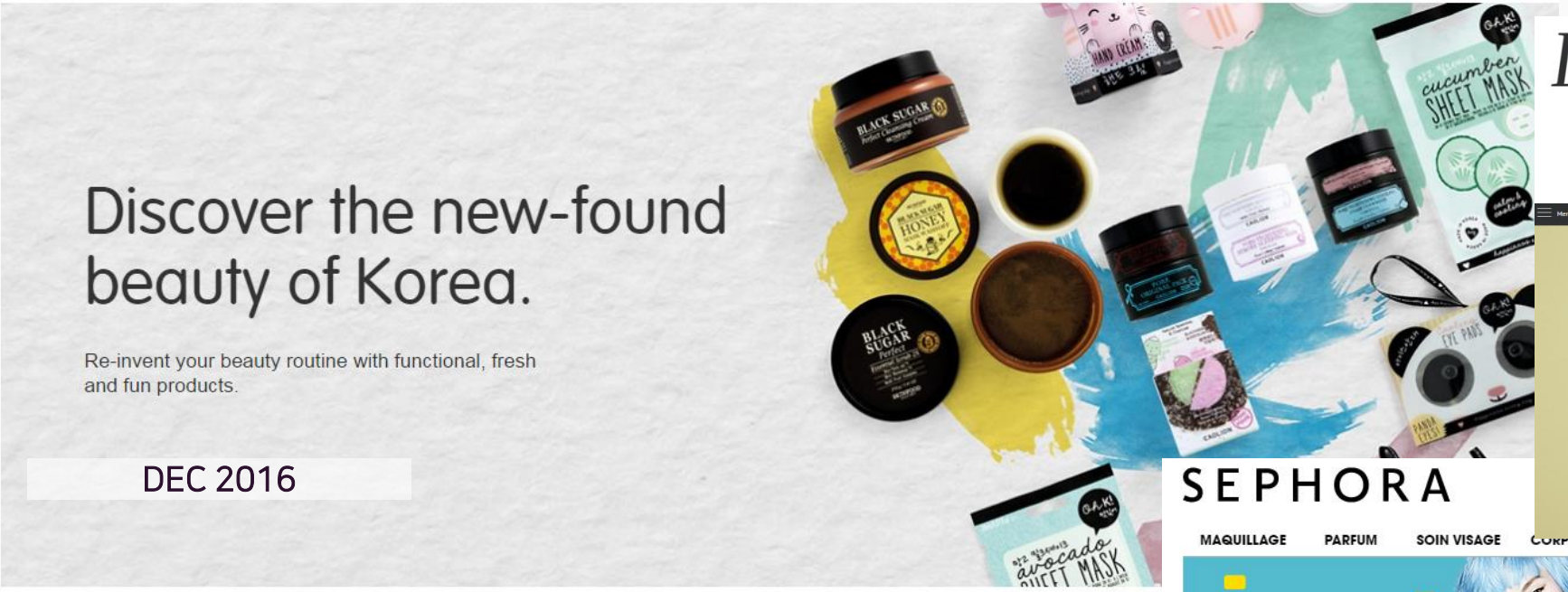
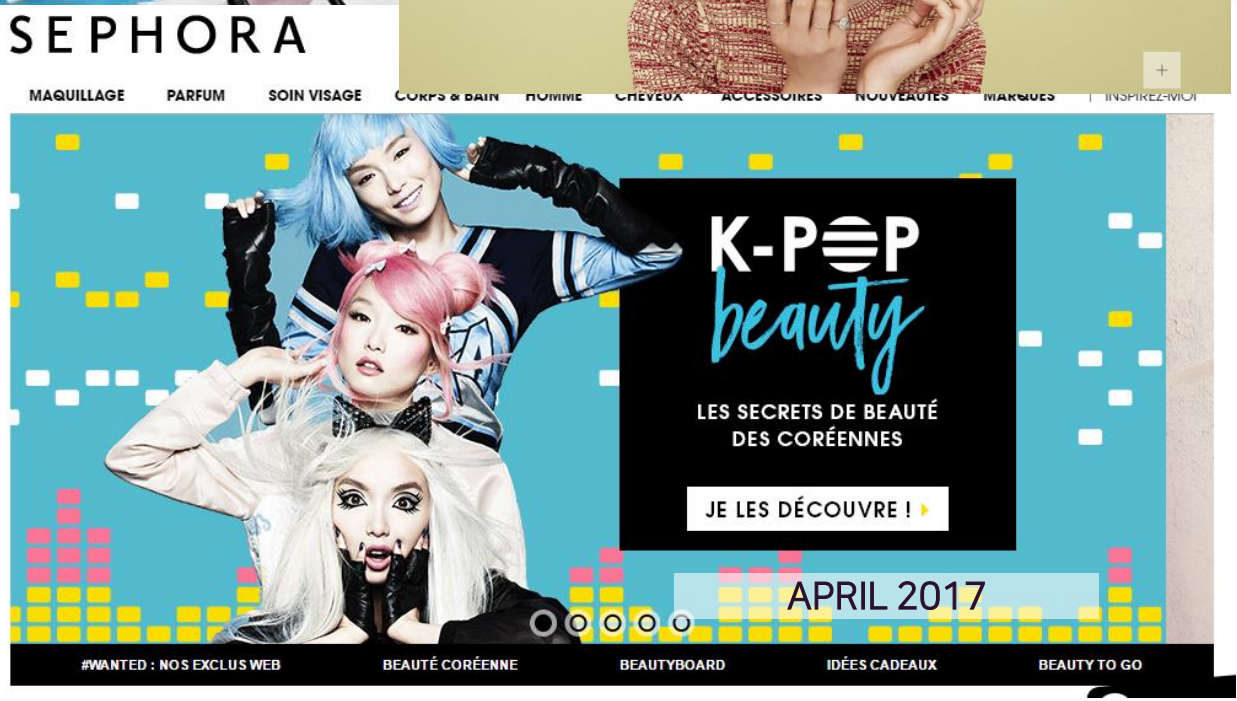


Soleil levant
Les 10 produits de beauté que les Coréennes s'arrachent



Read later

SEOUL MATES
Exhibition of Korean fashion and design in Paris

VANITY FAIR

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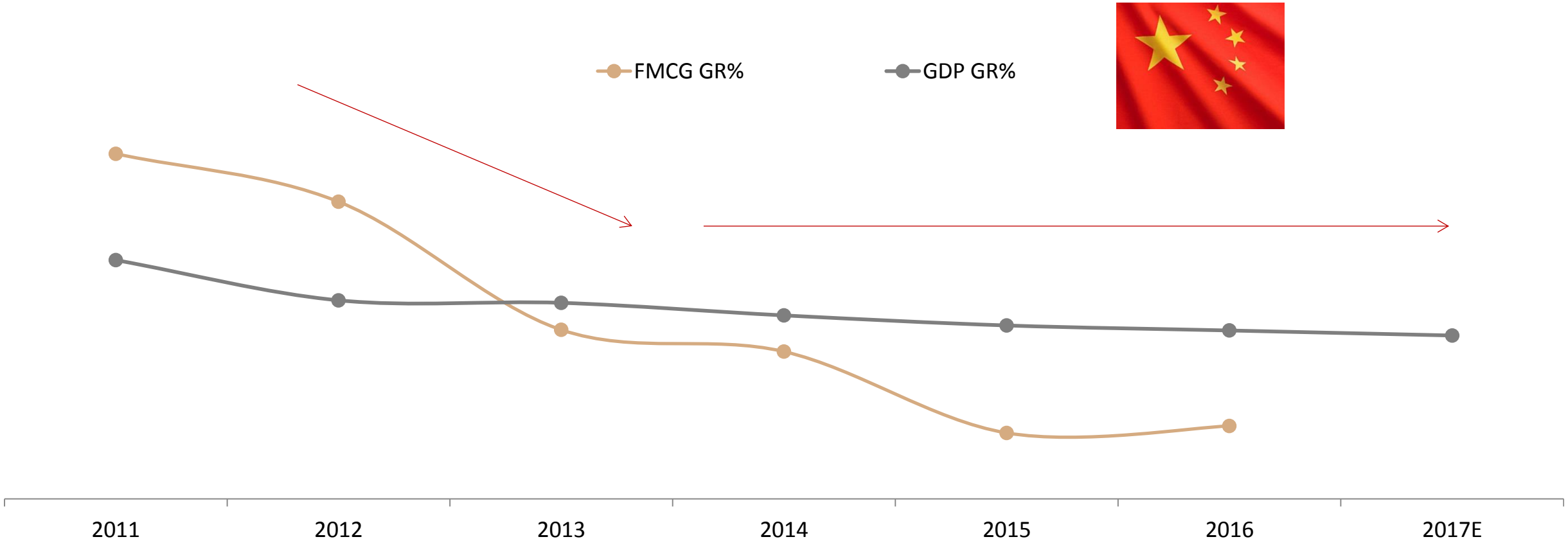
NEW BEAUTY GENERATION OF CHINA

China Beauty Market, Today and Tomorrow

Elaine Liu

“New Normal” economy environment of China will continue with a slower but sustainable development.

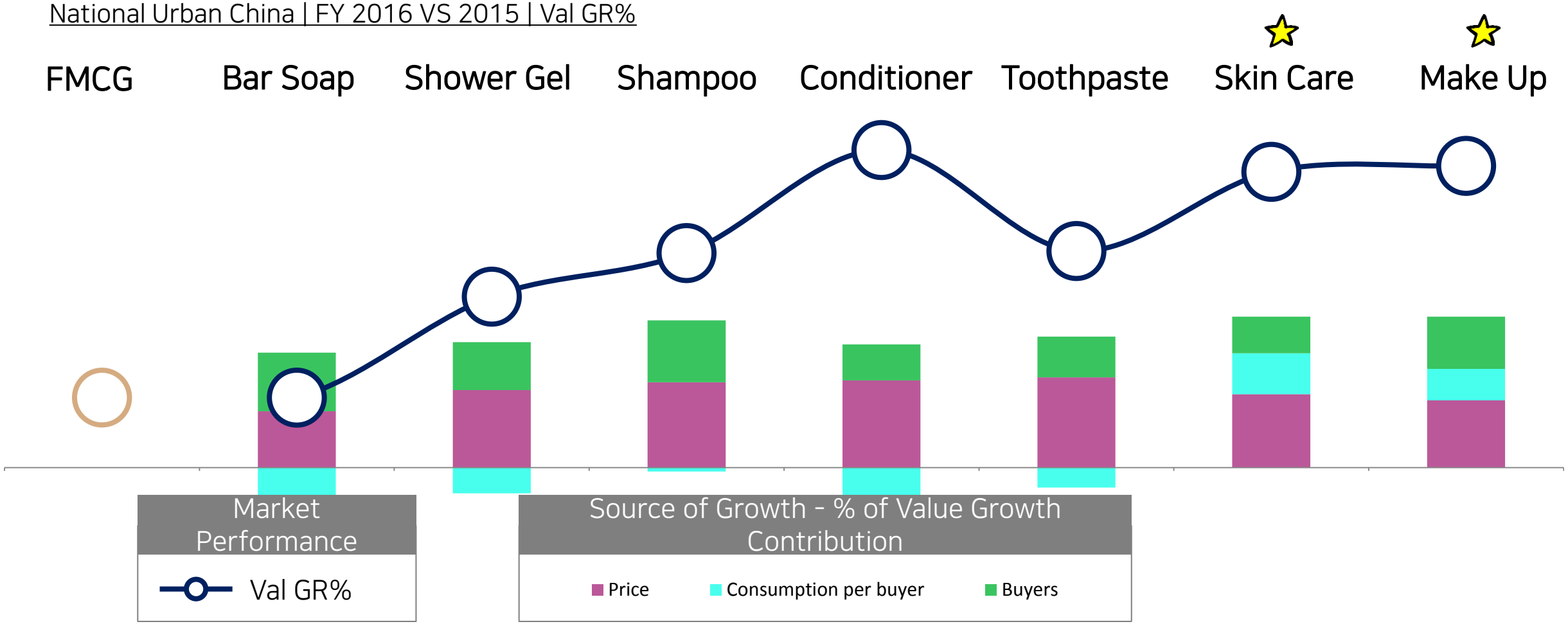


Data Source: GDP GR% is from National Bureau of Statistics of China
GDP estimation is from IMF

FMCG GR% is from Kantar Worldpanel China, Household Panel

While all personal care categories are on a strong growth, driven up by premiumization.

Personal Care Category Performance And Growth Engines In China
National Urban China | FY 2016 VS 2015 | Val GR%



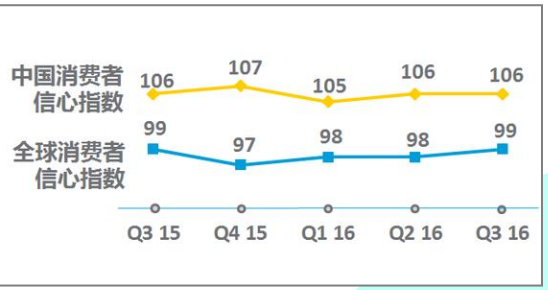
Data source: Kantar Worldpanel Household Panel

Consumer upgrade is happening across all industries in China. CCI remains high.

Outside Meal

Entertainment

Consumer Confidence Index



Cloths

Travel

Exercise

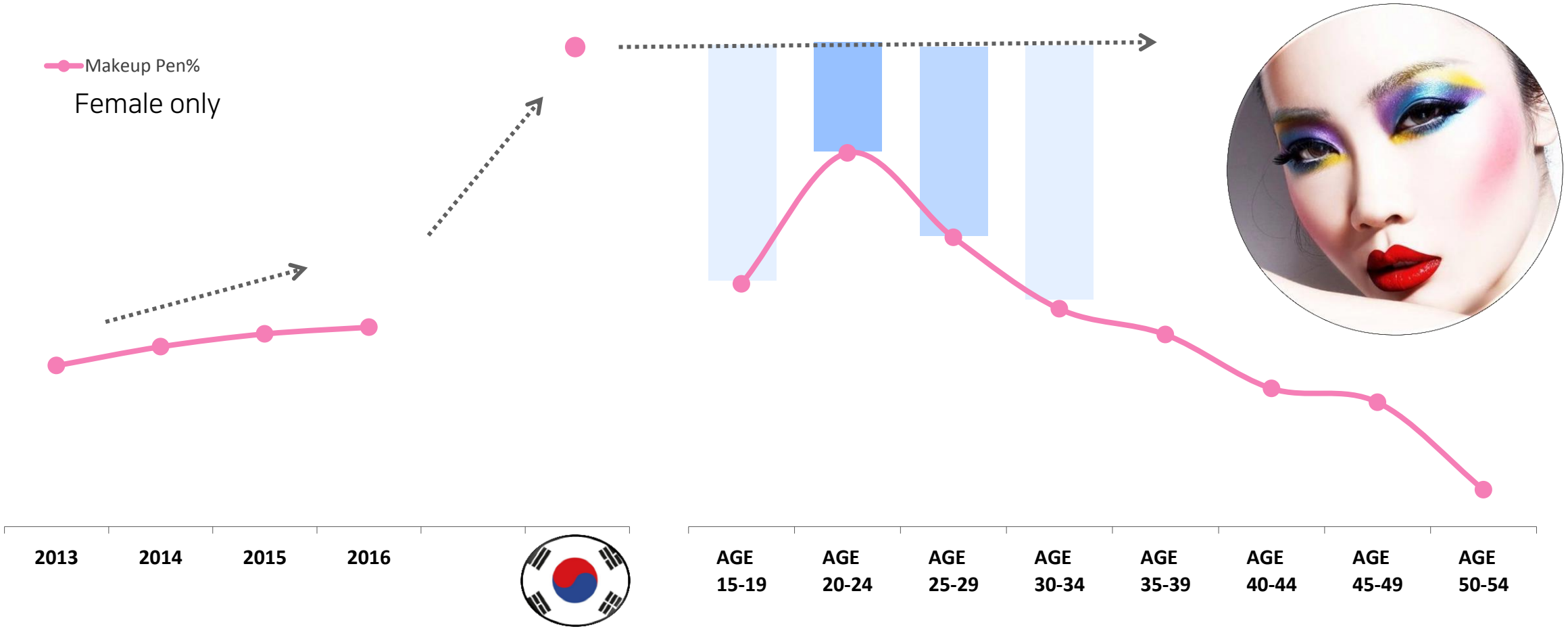
whole day

brunch

THE SIX ROOT ENGINES

Increasing amount of women start making up. Young girls lead the trend and will raise up China market penetration in long-term.

Regime Sophistication



* The back trend is recalculated based on the GR% from HHP and latest 2016 status from BTP

Data source: Kantar Worldpanel Household Panel / Kantar Worldpanel Individual Beauty Panel

Women are spending more time on their skin care through more advanced regime. Full advanced regime will consistently grow led by mask and serum.

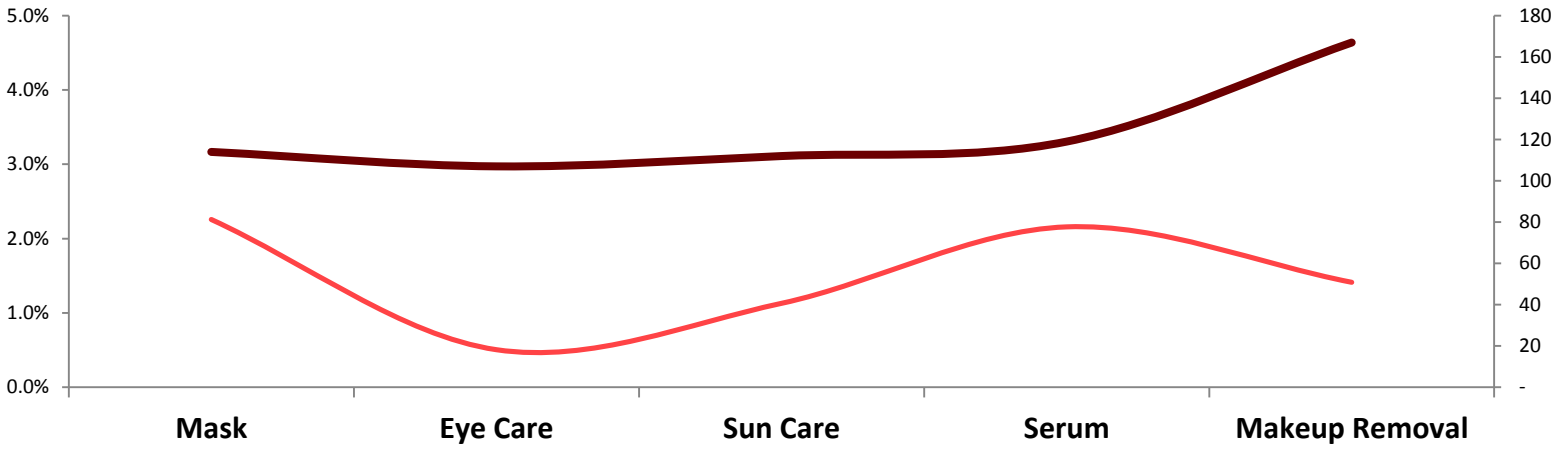
Regime Sophistication

38%

of consumers using more regime steps than last year

Pen% Chg of Points | FY 2016 vs 2015

Relative Pen% Index | Women Age 20-29 VS Total | FY 2016

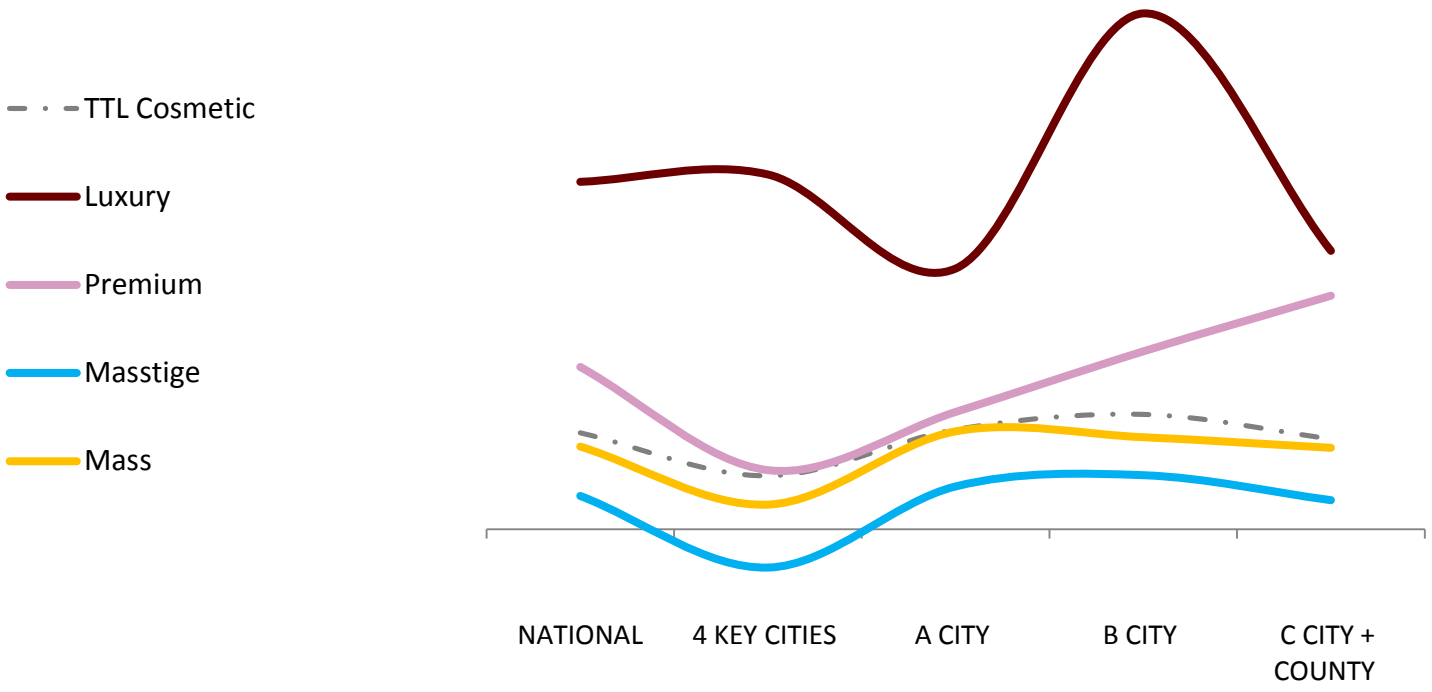


Data source: Kantar Worldpanel Household Panel / Kantar Worldpanel Individual Beauty Panel

Consumers willing and able to pay for high quality. Premiumization is the most important growth engine.

Pay For Premium

Cosmetics Performance by Price Tiers | FY 2016 VS 2015 | Val% & Val GR%



30%

of consumers purchased more premium cosmetics than last year

Data source: Kantar Worldpanel Household Panel

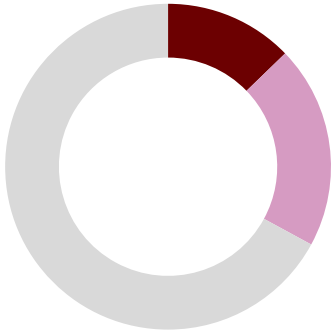
Premium price can be charged only when consumers are convinced with the product value, through the analysis and test done themselves.

Consumers More Picky

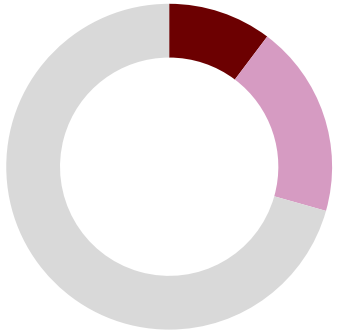
Relative Penetration% of Luxury+Premium

- Luxury Brands
- Premium Brands

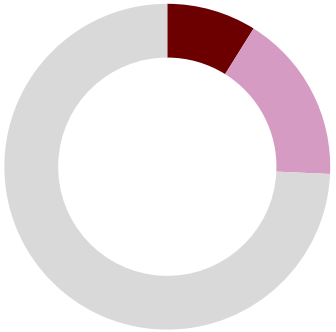
Serum



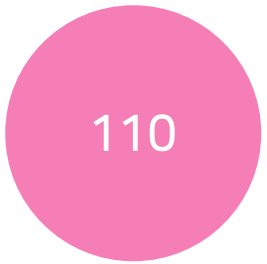
Eye Care



Face Makeup



of Perceived Benefits Index*



- # of Perceived Benefits Index = # of Usage Benefits selected by the consumers of each format, verses total category

Albion Skin Conditioner Essential

最开始先用的健康水 這真的是一個神奇的化妆水 它是顶着药字号的化妆水哈 每次额头 下巴起闭合粉刺痘痘什么 只要配着尤妮佳那个超省水的化妆棉敷一敷痘痘部位 很明显第二天就有强烈的改善～

我是混油皮，姨妈会冒痘痘，有时候不定期也会长一两颗。T区油，脸颊干。

我用的渗透乳2号，美白保湿。搭配健康水，祛痘效果真的很快。脸上有一颗又大又红又肿的痘痘，第二天，能消肿一半。一定要搭配他们家的化妆棉，我没有用过其他家的化妆棉，没法对比评价。

质地很水润，非常好推，延展性很棒；3号色虽然不是最白色号，但是也是很白了，刚开始涂的话会有点假白，但是过一会儿就好了，颜色非常柔和自然，妆感不重，不会死白，自然通透提亮的感觉哈。持久度还不错，一般早上化妆，下午3,4点钟几乎不太会脱妆的。

保湿度也给它5⭐，因为大家印象中粉底液都会比较干，可是这个涂上脸的时候一点都不卡粉（配合粉底刷）正是因为它很服帖很轻薄所以一点都不假面，我最爱的就是化完妆后几个小时脸上有点出油的时候，那时候的皮肤看起来简直跟磨了皮一样没毛孔还很有光泽💎

Giorgio Armani Designer Lift smoothing firming foundation

Data source: Kantar Worldpanel Individual Beauty Panel / Kantar Worldpanel Individual Usage Panel

The considered suitable products have been diversified greatly to meet growing complicated consumers' needs and knowledge.

Consumers More Picky

A suitable skin base color should consider the skin hue, whiteness and redness

COVERMARK

色调种类

Blue Tone			明度	Yellow Tone		
粉色系	自然色系	小麦色系		小麦色系	自然色系	粉色系
		BO 00	高	YO 00	YN 00	
	BN 10	BO 10			YN 10	YP 10
BP 20	BN 20	BO 20			YN 20	YP 20
	BN 30		低			YP 30

Skin conditions are classified into 8 types and product benefits should be selected properly

Sensitive skin

Oily Sensitive

Dry sensitive

Mixed skin

Oily Mixed

Dry Mixed

Dry skin

Desert dry

Dry

Oily skin

Super oily

Oily

Data source: Kantar Worldpanel Individual Usage Panel

Cosmetics market competition become increasingly fierce. “Big” only is not enough.

Market Fragmented

21,311

2016 Cosmetics New Products

The Val% of Top 20 brands in Skin Care

-5% vs. Year 2015

The Val% Index of Top 20 brands in TT Cosmetics Among Age 15-34 women VS Total

93

The number increased by

17% vs. Year 2015

The Val% of Top 20 brands in Makeup

-7% vs. Year 2015

Data source: Kantar Worldpanel Household Panel / Kantar Worldpanel Individual Beauty Panel

Real globalization burst out through E-Commerce. Niche and small brands win out.

Market Fragmented

E-commerce Allow Consumers Buying Good Products Across The Whole World

E-commerce channel | TT Cosmetics

23% Val% in 2016

+67% Val GR% 16 vs 15

小红书 全世界的好东西

洋码头

亚马逊 amazon.cn

淘

全球购 G.TAOBAO.COM

值 什么值得买 SMZDM.COM

Yuze 玉泽 Focus on Hydration

- Jointly developed with dermatology expert
- Repair skins' moisture barrier

Flamingo 火烈鸟 Eyelashes Thickening

- Curling and volume Mascara without agglomerating

Filorga Medical Beauty

- Using NCTF to implement Anti-age

KIKO MILANO

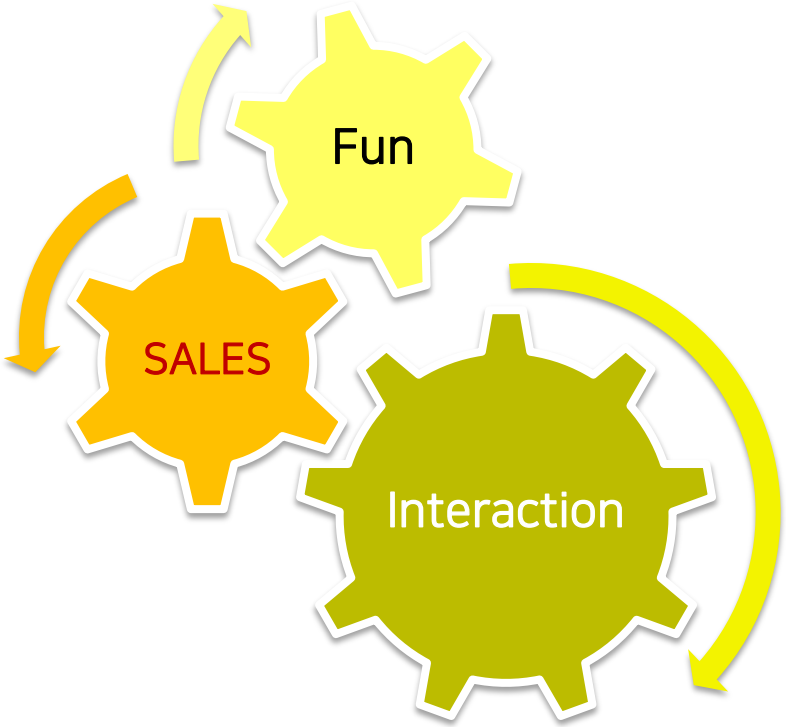
Kiko Hero products: Lipsticks

- Professional & Diverse Lipstick color at a lower price

Data source: Kantar Worldpanel Household Panel / Kantar Worldpanel Individual Beauty Panel

In new digital world, social and commercial are closely and happily bundled together.

Fast Fashion

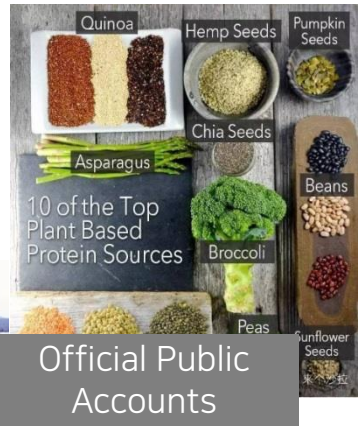


Social Happily & Sales Happily

Wechat

1.8% Pen%

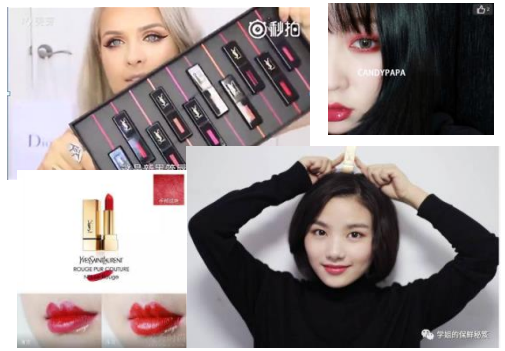
3 M. Buyers



Online Celebrities Lead The Trends Among Young

Weblog

Live Streaming



Wu Dawei 吴大伟

Data source: Kantar Worldpanel Individual Beauty Panel

Consistent and speedy new news is a “MUST”. Consumers spend money on fun rather than product itself sometimes.

Fast Fashion

FUN Innovations

New Format

Lancôme
Brightening & Replumping Mousse Lotion
Launch date:2017.3

New Packaging

Innisfree
Mini Repairing Capsule Mask
Launch date:2016

New Size

GIORGIO ARMANI beauty

Giorgio Armani
Matte Lip Tint
Nick name: Small fat
Launch data: 2016.10.

Expend the Pretty Faces

Fresh Meat Speakman

ESTĒE LAUDER

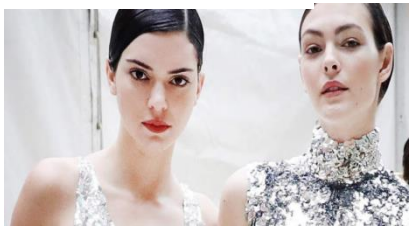
MAYBELLINE NEW YORK

LANCÔME PARIS

Embrace Fashion

Dior

CHANEL



Being health, natural and effectiveness are the continuous product themes in recent years.

Health & Effective

Natural Proposition

Non Addictiveness / Derma

在线咨询 Own doctors' endorsement

Deep clean through amino acid

Health

Effect

Toner Essence

CPB Correcteur Essence

SKII Treatment Essence

Pechoin Hydra Energy Essence Toner

Hyaluronic Acid

Hydra Smoother
高浓度玻尿酸面膜

Aquaring Mask
水库面膜

Korean brands can land in China market through 3 key paths

DIGITAL

Playing around digital world to drive business and attract millennials.

- Utilize social media (Wechat/Weblog/Live Streaming platforms) to build up digital WOM
- Invest in flagship store on Tmall/JD to generate traffics

HERO

Utilizing hero SKU, stand out in one format as the start and focus on your specific target group

- Build up the hero SKU which should be the best in one specific product cluster
- Health & intensity features can assist in the popularity of the hero SKU

TRENDY

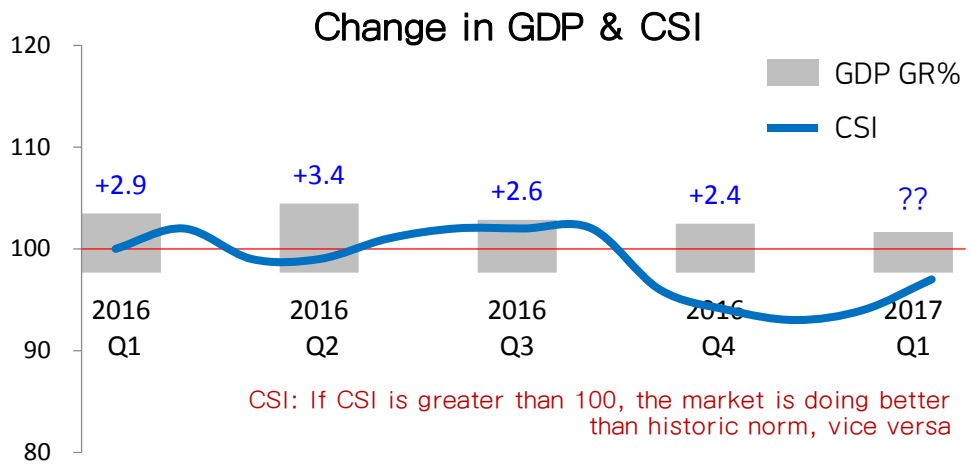
KR image & latest new innovation to be fully used.

- Launch new innovations (new format/size/package) based on the hero line consistently, annually at least frequency
- KR wave still popular. Trendy image can assist in awareness establish

Hair & Body Trend

Kim, Jiwon
Group Account Director

Who are the Millennials ?
What do they really need ?
NEXT

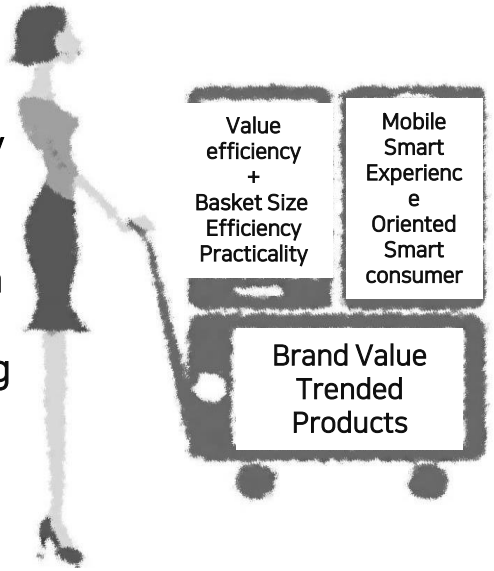


Political Anxiety

Economic Anxiety

Social Anxiety

Uncertainty & Spending contraction & Accelerating [-] growth



Current Key Words for Millennials

Natural

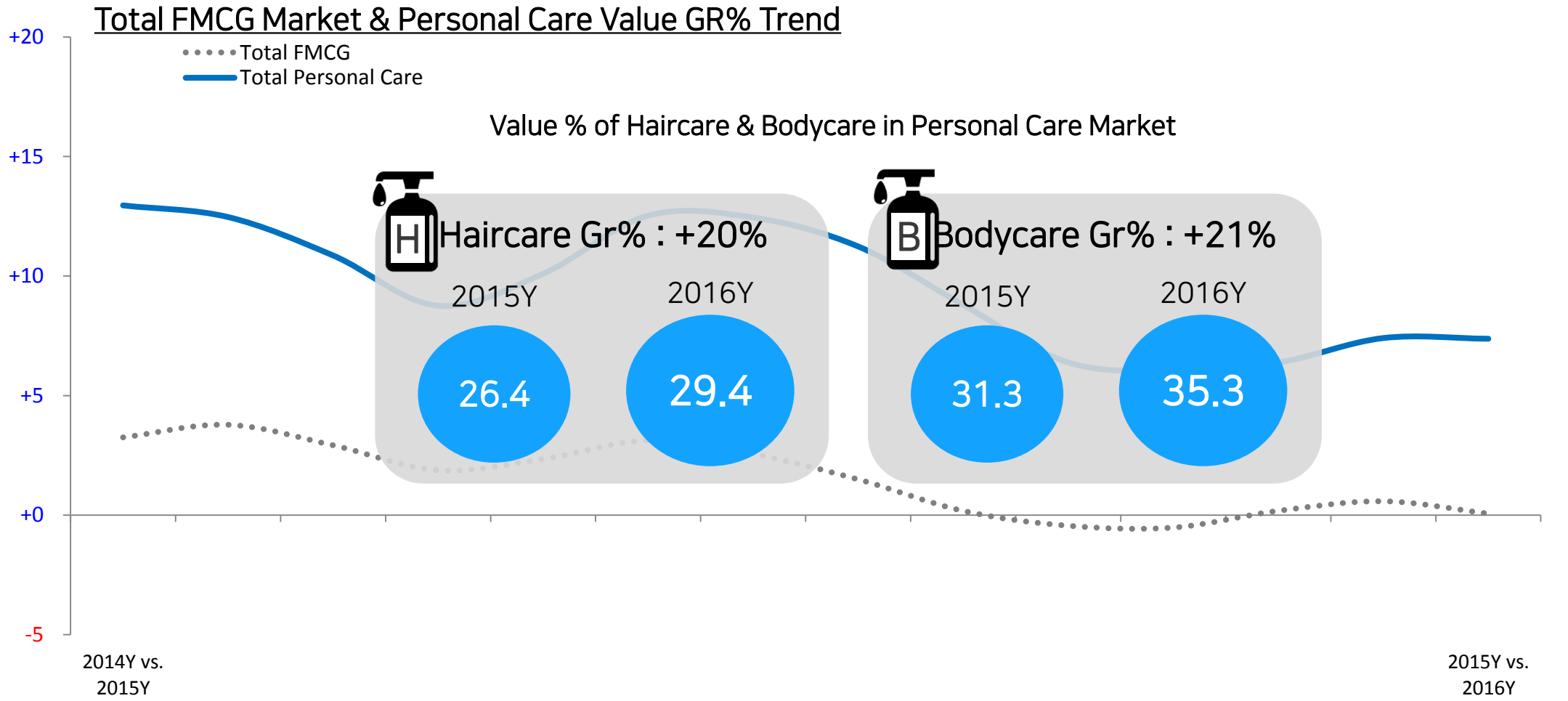
Evolve

Across

Trend Sensitive

Have strong needs in Healthy & New products…
Pursue Value consumption & Efficiency together…
Familiar in Digital devices and highly interested in Premium offline…
Look for 'Fun' in spending itself…
Consumers that are highly adaptive to change & leading new trend

The growth rate of FMCG has been slowed down, and a positive performance of Haircare & Body Care in Personal Care market has been continuing

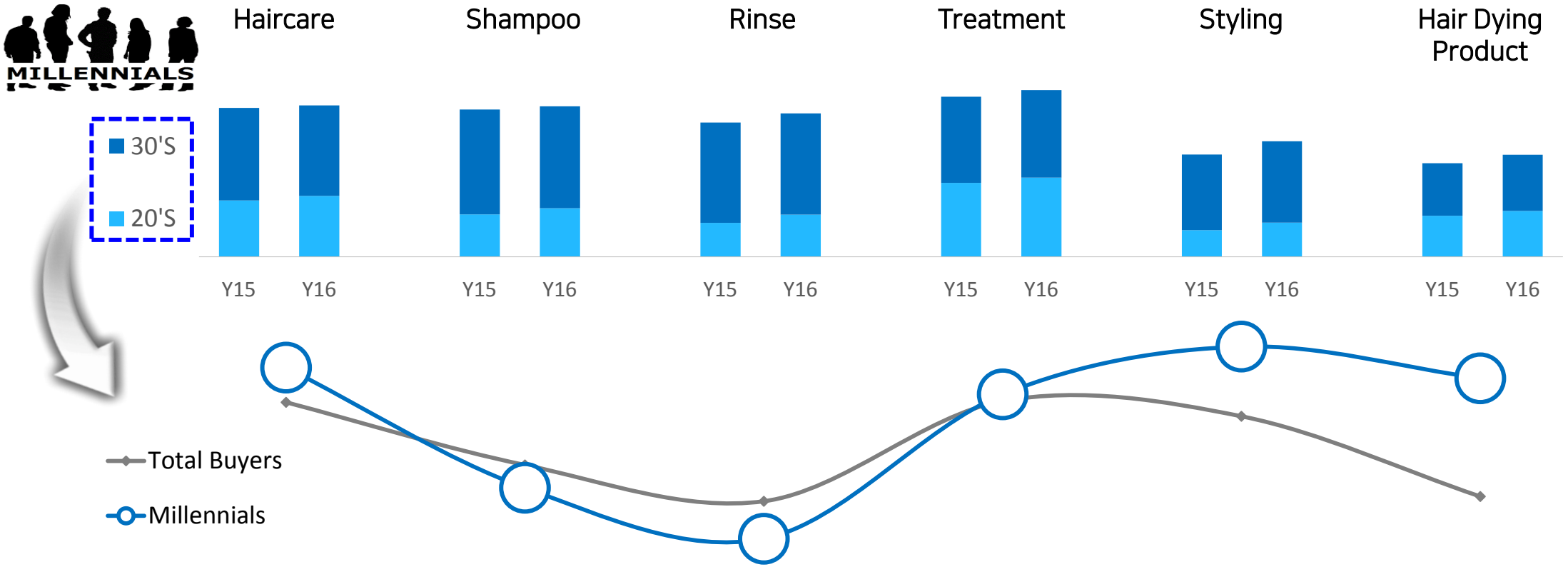


*Personal Care – Soap, Bodycare (Body Moisturizer, Wash, Suncare, etc.), Haircare (Shampoo, Treatment, Rinse/Conditioner, etc.), Oral Care (Toothpaste, Toothbrush, etc.), Fem Care (Pad, Panty Liner, etc.)

*Kantarworldpanel HHP 5,000 Household, Total FMCG, Value GR%, Direct Purchase

Millennials are becoming more influential in many hair categories, compared to total consumers of haircare

Buyer % by Haircare Types

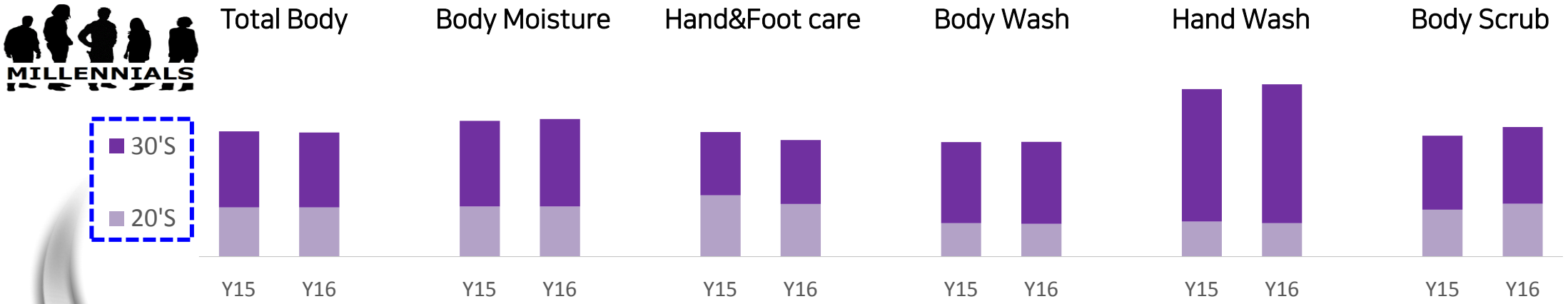


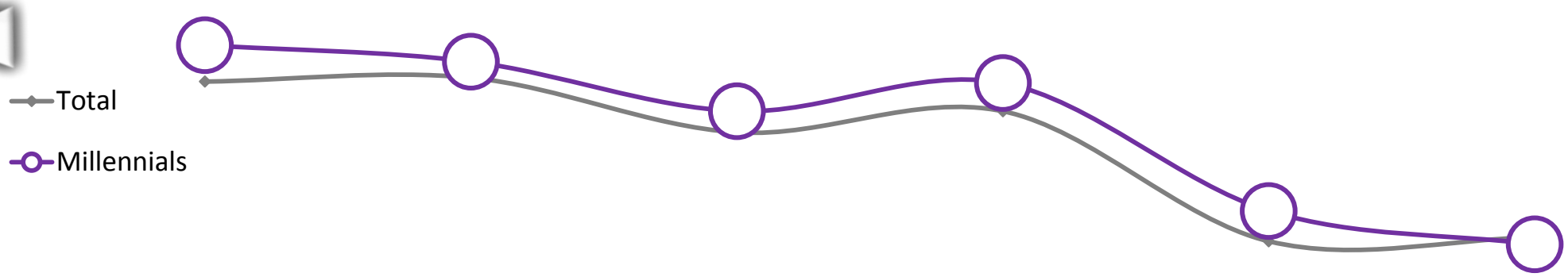
Ave. Spending by Hair Care type INDEX (2016Y vs. 2015Y)

*Kantar Worldpanel Lady Panel (9,700 individuals), Total Haircare, consumers / Avg. spending

Increase in number of buyer and purchasing power of Millennials against total market is shown in Body Care market as well

Buyer % of Millennials by Body care type





Ave. Spending by Body Care type INDEX (2016Y vs. 2015Y)

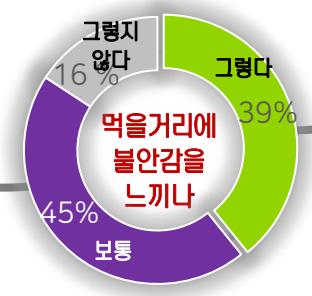
KANTAR WORLDPANEL

*Kantar Worldpanel Personal Panel (9,700 people), Total Body Care, Buyer/Avg. Spending
(Body Care: Body Moisture/Hand&Foot care/Body Wash/Hand Wash/Body Scurb/Makeup /Body Cleansing Others)

Natural

As a result of foreign issues constantly striking Korea, domestic consumers are becoming more anxious and getting more involved in health issues
Natural concept is expanding in food category as well as Home/Personal care

*Source: The Korea Chamber of Commerce

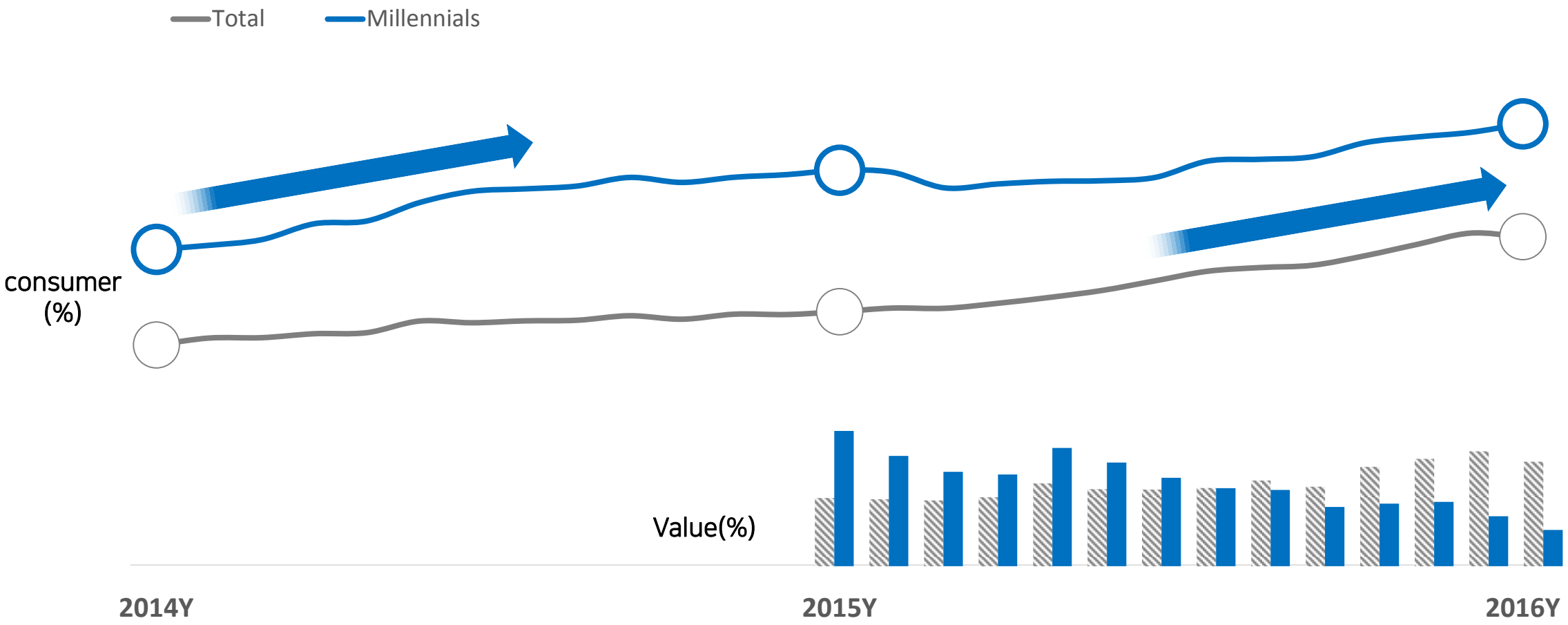


생활화학제품에 대한 소비자 불신, 안전성만이 답!?
지난해부터 이어온 화학포비아(화학제품 공포증) 현상이 2017년 들어서도 이어져오고 있다. 소비자들의 화학제품에 대한 불신은 그칠 줄 모르고 있으며, 이는 가성비보다는 안전성을 최우선으로 생각하는 안티폴루션(Anti-Pollution)이란 하나의 사회현상으로도 자리잡은 형국이다.

이러한 현상은 곧 생활화학제품 매출 하락으로 이어졌는데, 지난 2월 이마트에 따르면 표백제, 방향제, 탈취제 등 주요 생활화학제품 매출이 8개월째 마이너스 행진을 지속하고 있다. 옥시 제품 철수 직후인 지난해 5월 이후 매달 탈취제 30~50%, 방향제 30~60%, 방충제 및 주거세제 10~30% 매출이 줄었으며, 특히 표백제 매출은 지난해 5월 -57.1%에 이어 8월 -71.5%의 매출액 감소를 보였다.

2003 "SARS" | 2005 "Bird Flu" | 2009 "H1N1" | 2014 "Ebola" | 2015 "MERS" | 2016 "Zika Virus" | May 2016 "Humidifier Issue" | September 2016 "Oral Care Issue" | November 2016 "Bird Flu" | January 2017 "Waster Tissue/Diaper Issue"

The growth of natural shampoo is backed up by the growth of Millennials, and this trend is recently demonstrated in total consumers of haircare



*Kantar Worldpanel Lady Panel (9,700 individuals), Natural Shampoo, consumer %/Value GR%

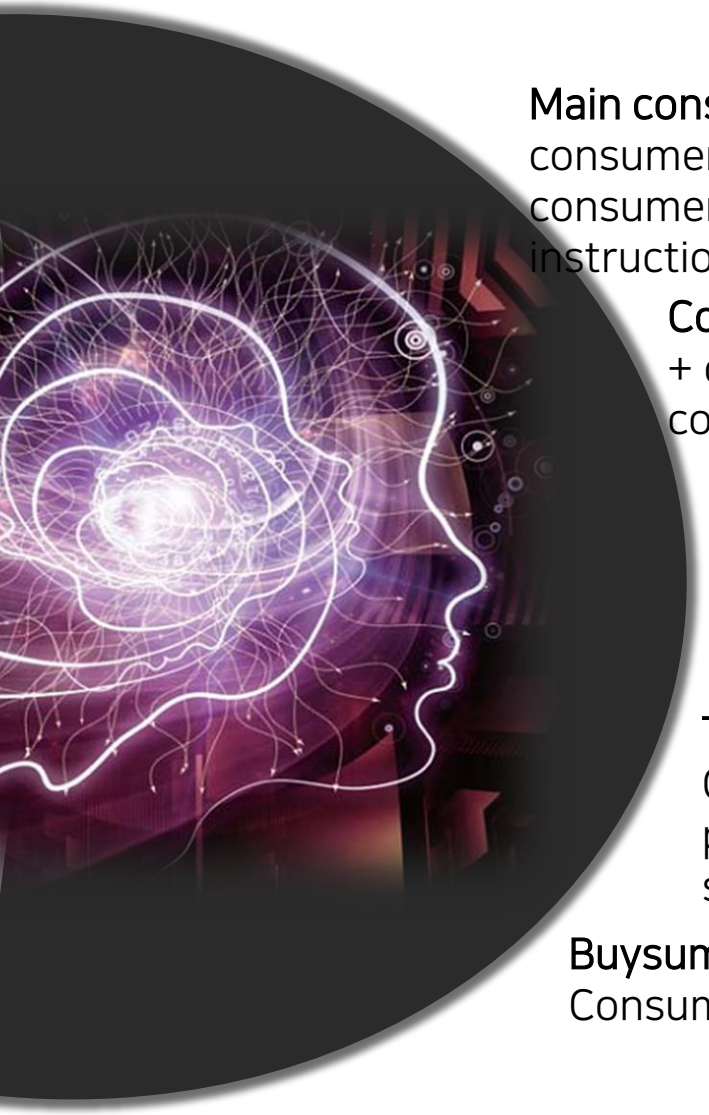
[Reference] Natural/Derma Hair& Body product

Natural Hair Product

Derma/Natural Body Product

Evolve

Evolving Information, Evolving Consumer



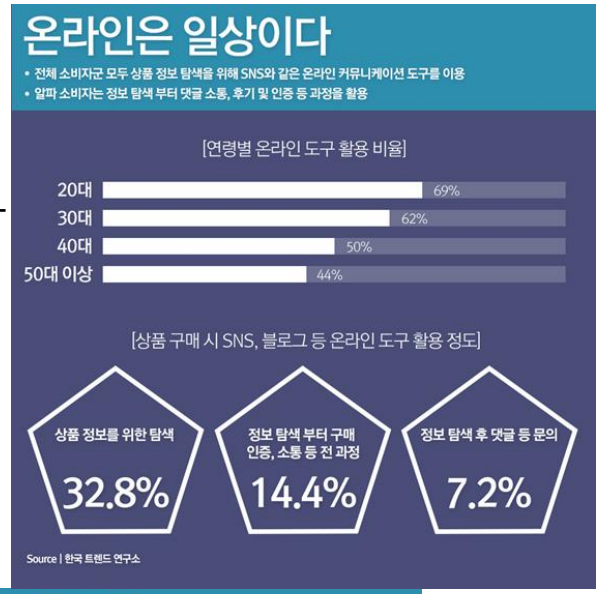
Main consumers of PB brand at convenience store– Modisumer: modify + consumer
consumers that modify and use a product in a different way from an instruction

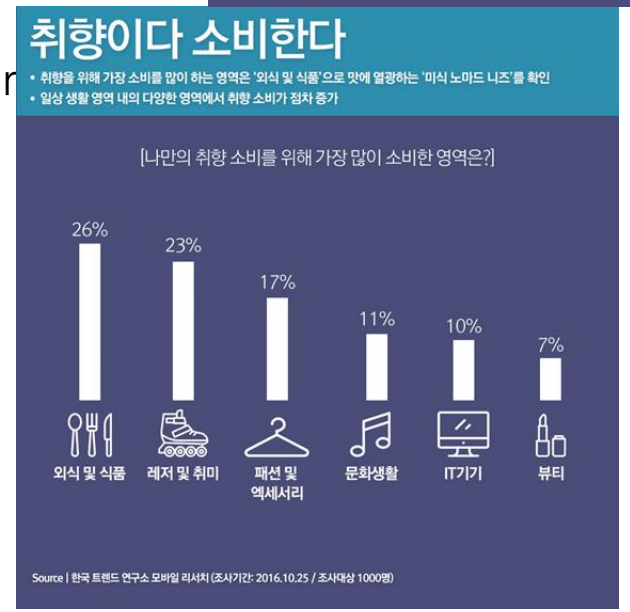
Consumers that create with a manufacturer– Cresumer: creative + consumer
consumers that create a new product to satisfy their taste

Researsumer: researcher + consumer
Consumers that constantly research/explore on their preferred categories

Twinsumer: Twins + Consumer
Consumers that use internet to connect with other people who have similar interest and preference, and share idea to make a decision

Buysumer: consumer + consumer
Consumers that have a role of buyers





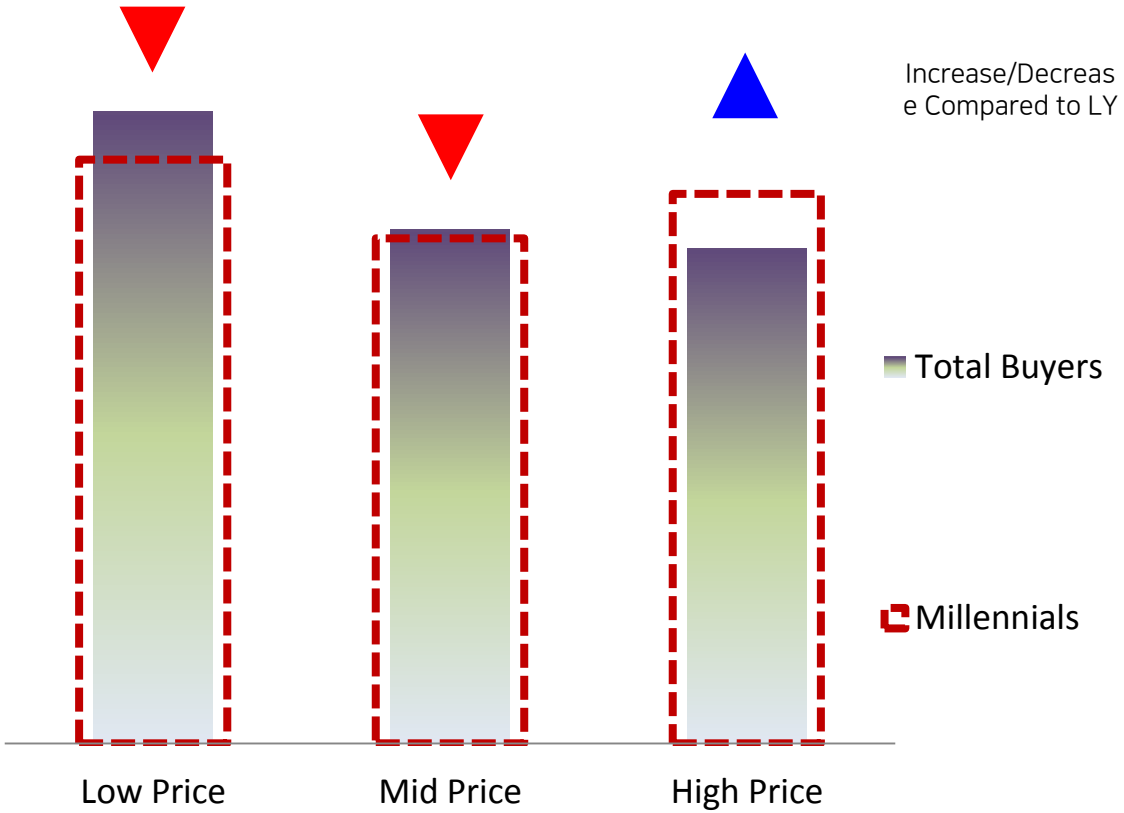
Average price of haircare market (incl. shampoo) is increasing, and the consumer % of Millennials is highly emphasized in high price range

Family Usage
Large Size
Affordable Price
Mass Brand

Highly Functional, Professional, Premium brand "For Myself"

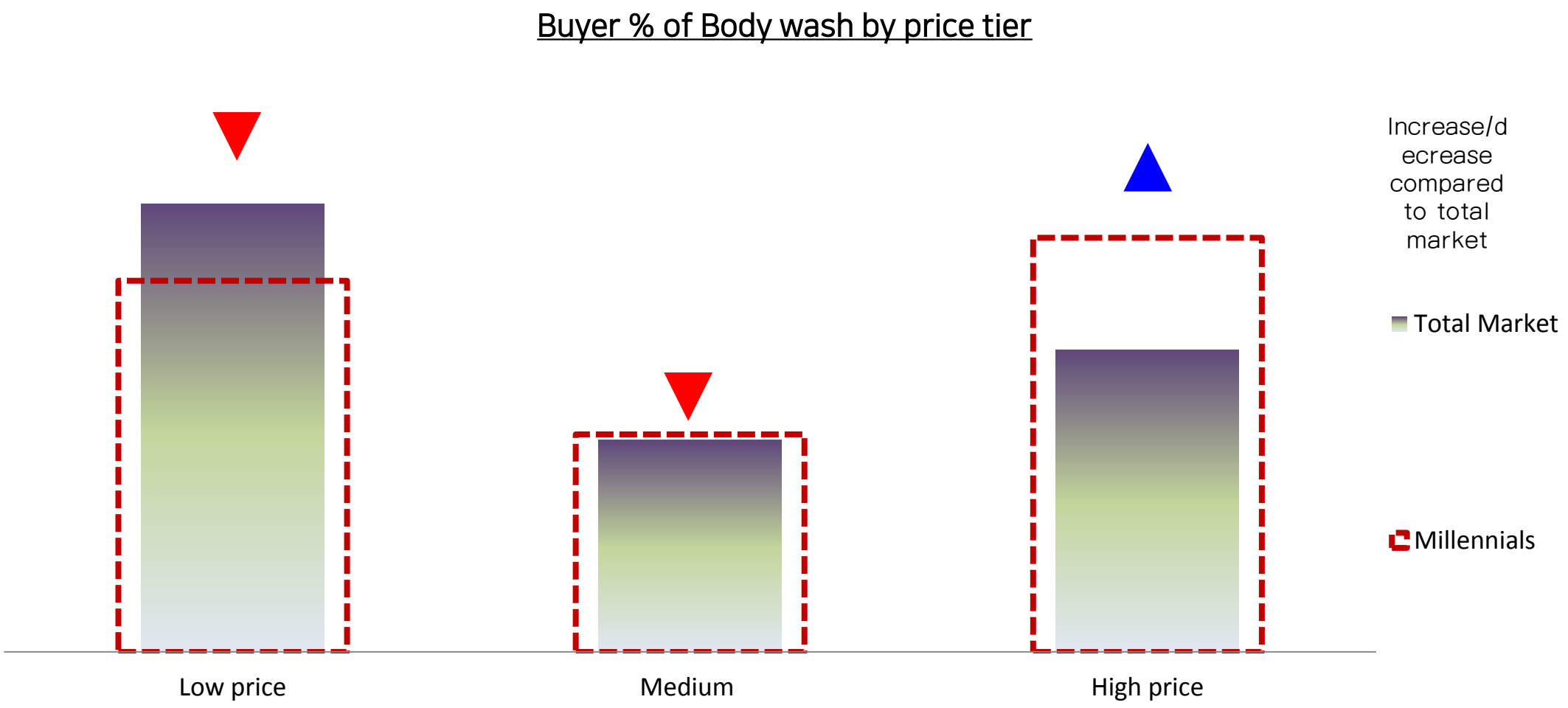
Avg. Price per Volume (KRW/Liter)

consumer % by Shampoo Price Range



*Kantar Worldpanel Lady Panel (9,700 individuals), Shampoo, consumer % / Value GR%, Direct Purchase

Purchasing weight for luxury body wash product of Millennials tend to be higher compared to total market



*Kantar Worldpanel Personal panel (9,700 people), Body wash, Buyer%/Growth rate of Value, Direct sales

[Reference] Evolving Value Consumption

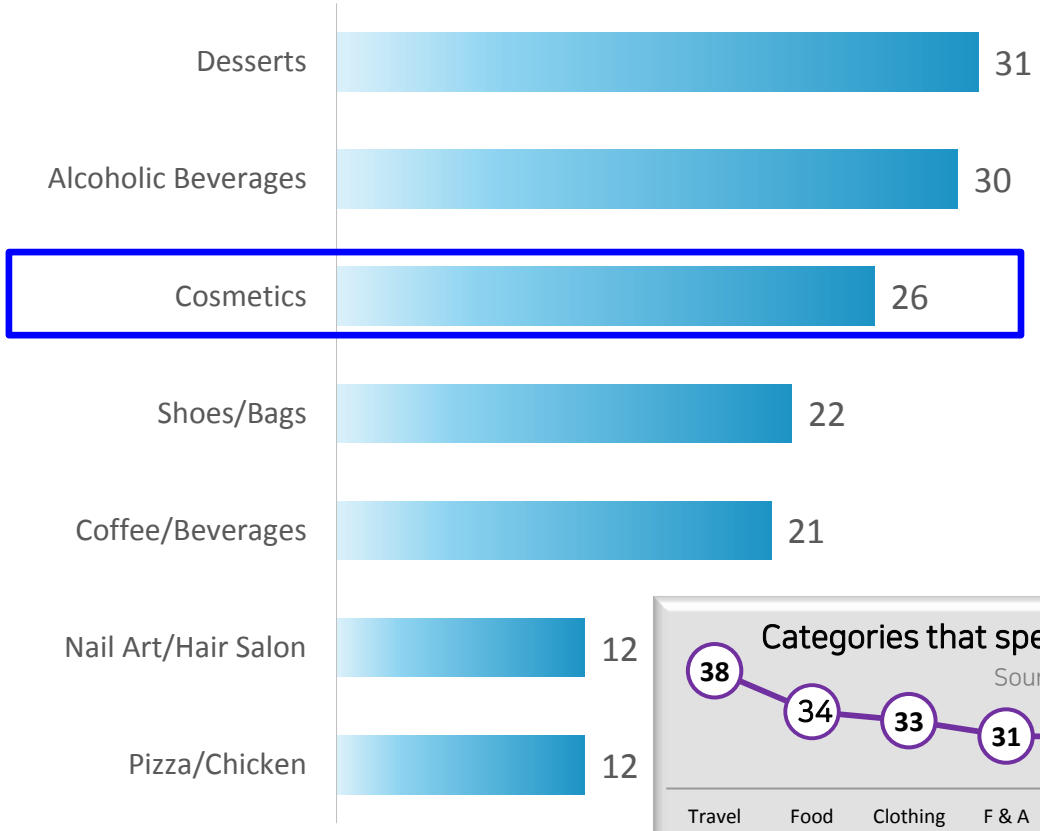
Small reward for myself ‘FXXK Cost’

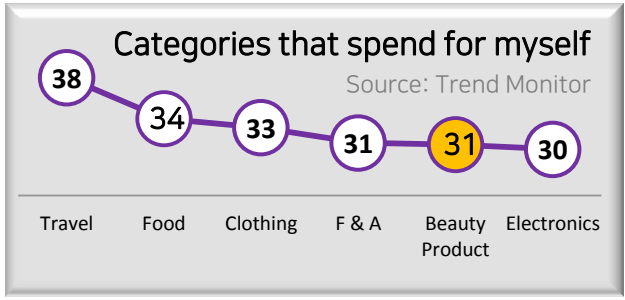
스트레스로 홧김에 지르고
SNS 전시 통해 공감 얻어

최근 'X발비용'이라는 신조어가 젊은층 사이에서 회자되고 있다. 비속어 ‘X발’과 ‘비용’이 합쳐진 단어로, ‘스트레스를 받지 않았으면 쓰지 않았을 비용’을 뜻한다. 홧김에 충동적으로 쓴 돈이란 뜻에서 ‘홧김비용’이나 ‘울화비용’이라고 할 수도 있다. 스트레스를 받아 충동적으로 시킨 치킨 배달, 평소라면 대중교통을 이용했을 텐데 모범택시를 탄 경우 등이 그 예다.

취업포털 인크루트가 지난달 회원 910명을 대상으로 조사한 결과에 따르면 스트레스로 홧김에 쓰지 않아도 될 돈을 지출한 경험이 있다고 밝힌 응답자는 전체의 80%에 달했다. 스트레스 비용의 가장 대표적인 사례는 ‘불필요한 물건 구매(25%)’ ‘온라인 충동구매(24%)’ ‘치킨 시키기(19%)’ 등이었다. 이들이 1년간 쓴 스트레스 비용은 평균 23만5,000원이었다.

Products that are hashtagged as ‘FxxK Cost on Instagram





The price range and the basket size in haircare has polarized recently
Millennials tend to purchase smaller basket size compared to total haircare consumers

Family Usage
Large Size
Affordable Price
Mass Brand

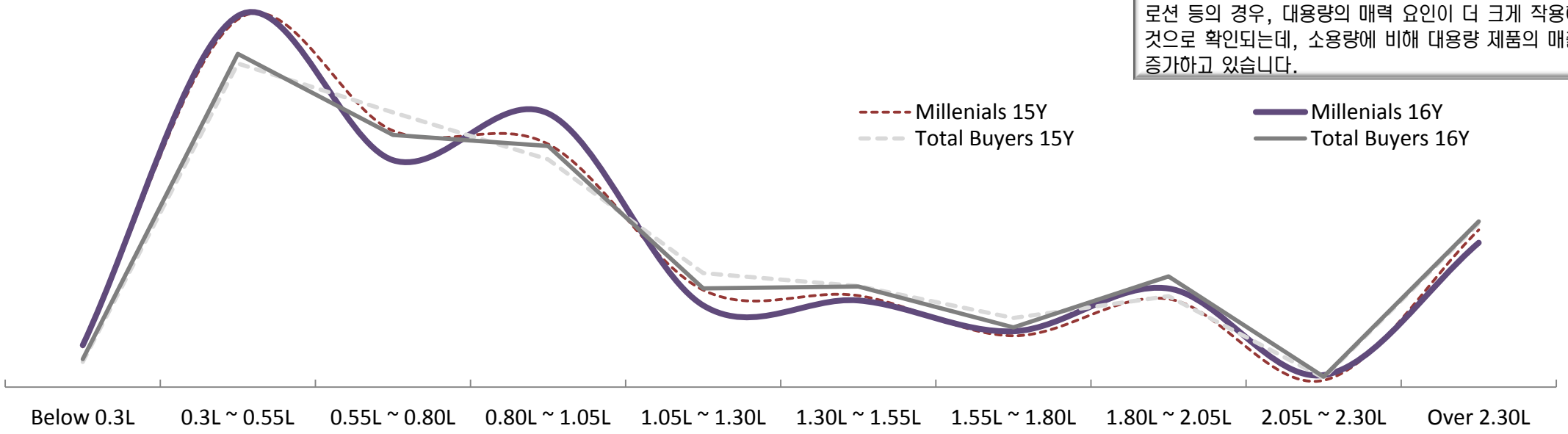
+

Highly
Functional
Professional
Premium
"For Myself"

대용량 · 무한리필··불황이 만든 신조어 '가용비'

장기적인 내수 불황에 가격 대비 성능을 뜻하는 가성비가 소비 트렌드로 떠오른데 이어 가격 대비 대용량을 선호하는 성향도 짙어지고 있는 것으로 나타났습니다.
화장품, 스킨부터 로션 - 샴푸와 트리트먼트 같은 헤어제품도 대용량을 출시했습니다. 최근에는 화장솜과 마스크팩 같은 제품도 대량으로 쟁여놓고 사용하는 사람들이 많아지고 있습니다. 그 중에서도 세안제와 바디 로션 등의 경우, 대용량의 매력 요인이 더 크게 작용하는 것으로 확인되는데, 소용량에 비해 대용량 제품의 매출이 증가하고 있습니다.

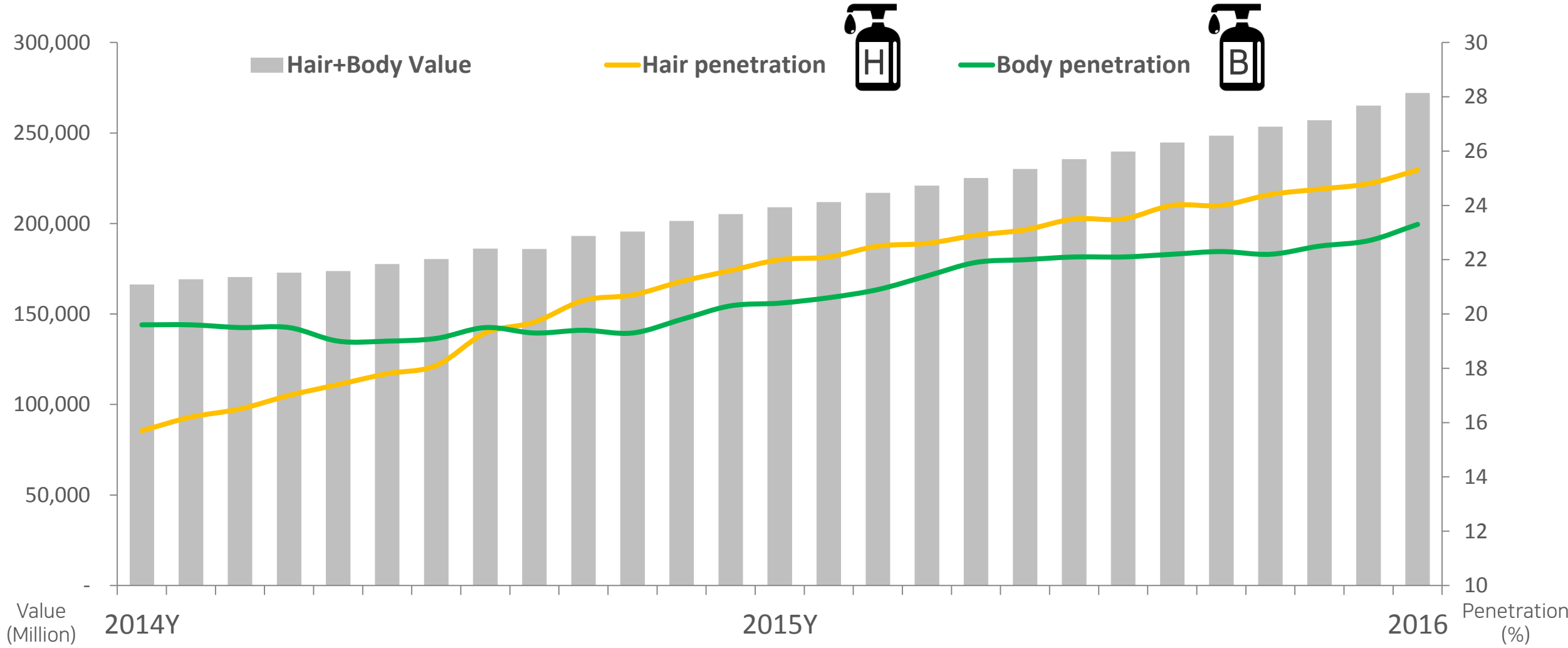
consumer % by Shampoo Basket Size



2015Y vs 2016Y, consumers, Shampoo, Direct Purchase

X (across)

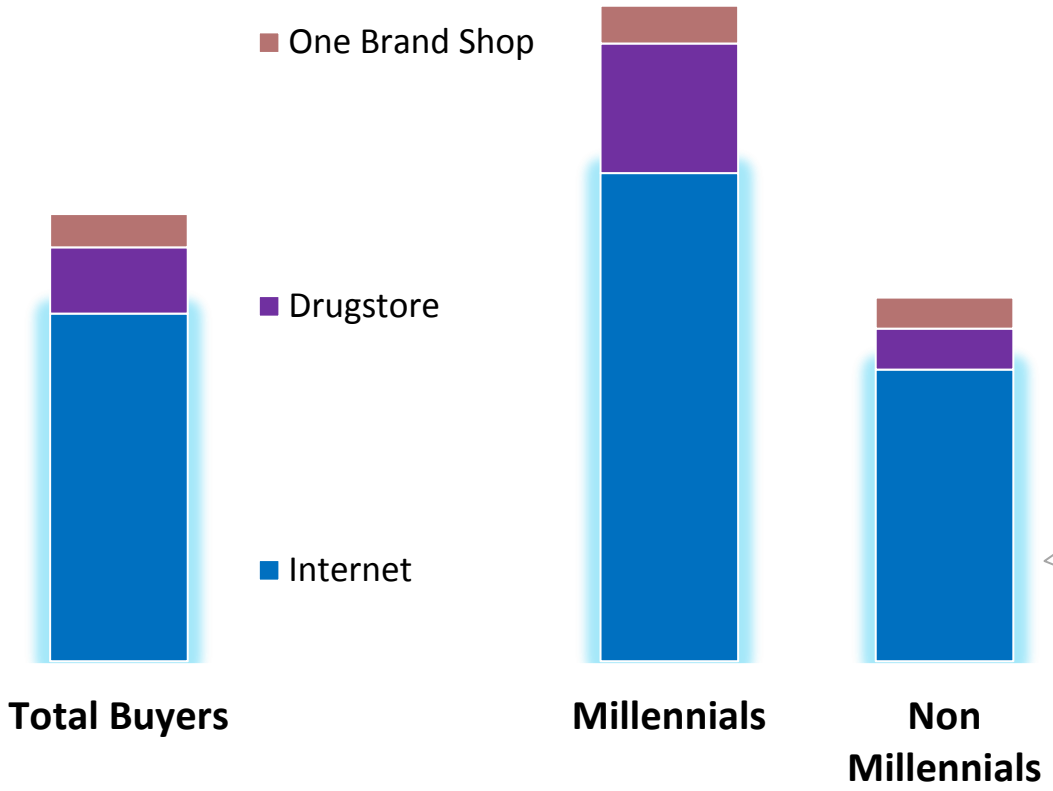
Accelerated growth of internet channel becomes stable, and other Niche/premium offline channels rise

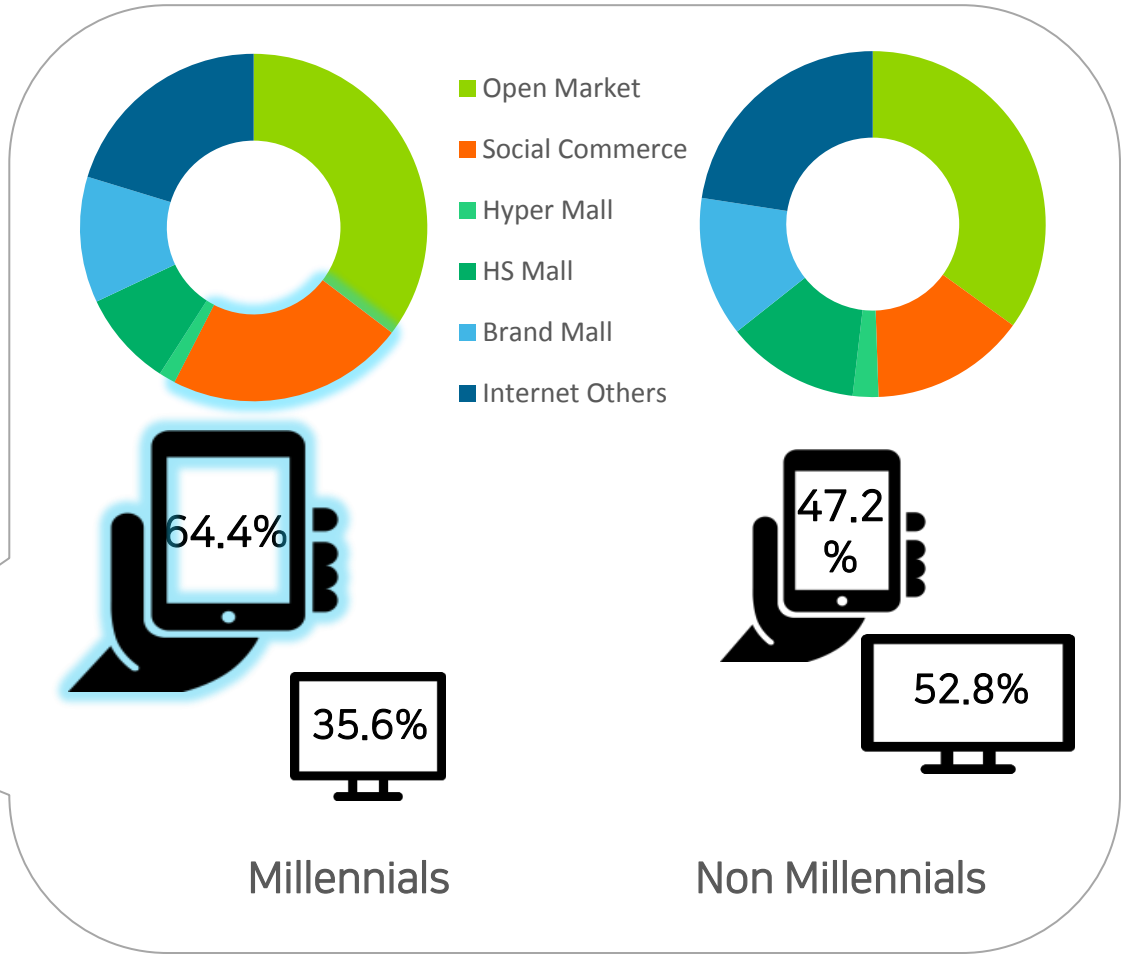


KANTAR WORLDPANEL

*Kantar Worldpanel personal panel (9,700people), Hair & Body care, Value/penetration Index, Internet

Internet channel shows high importance in Millennials through mobile device and social commerce
Among offline channels, drugstore > one brand shop demonstrate high portion as well

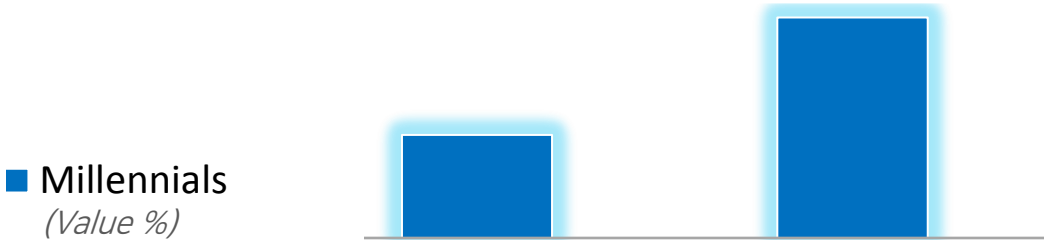




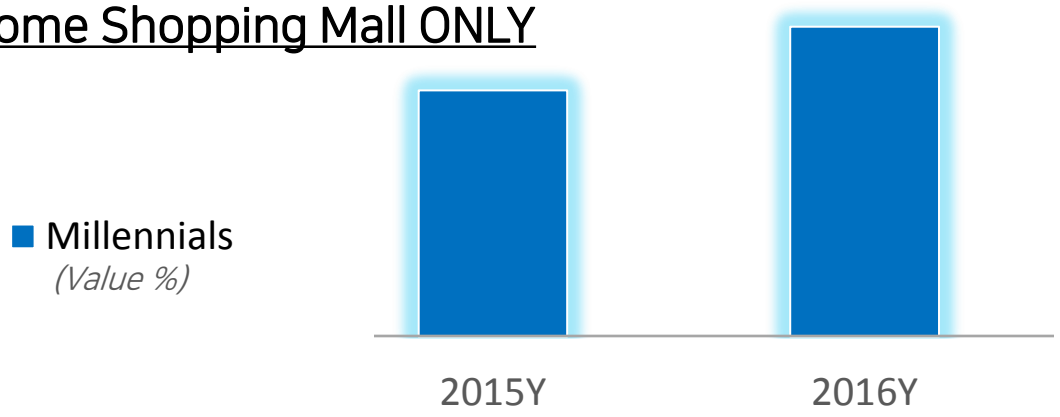
*Kantar Worldpanel Lady Panel (9,700 individuals), Haircare, Value %, Internet

Omni Channel: The value % of Millennials in HS channel is small, but it is growing at a fast pace compared to other type of consumers

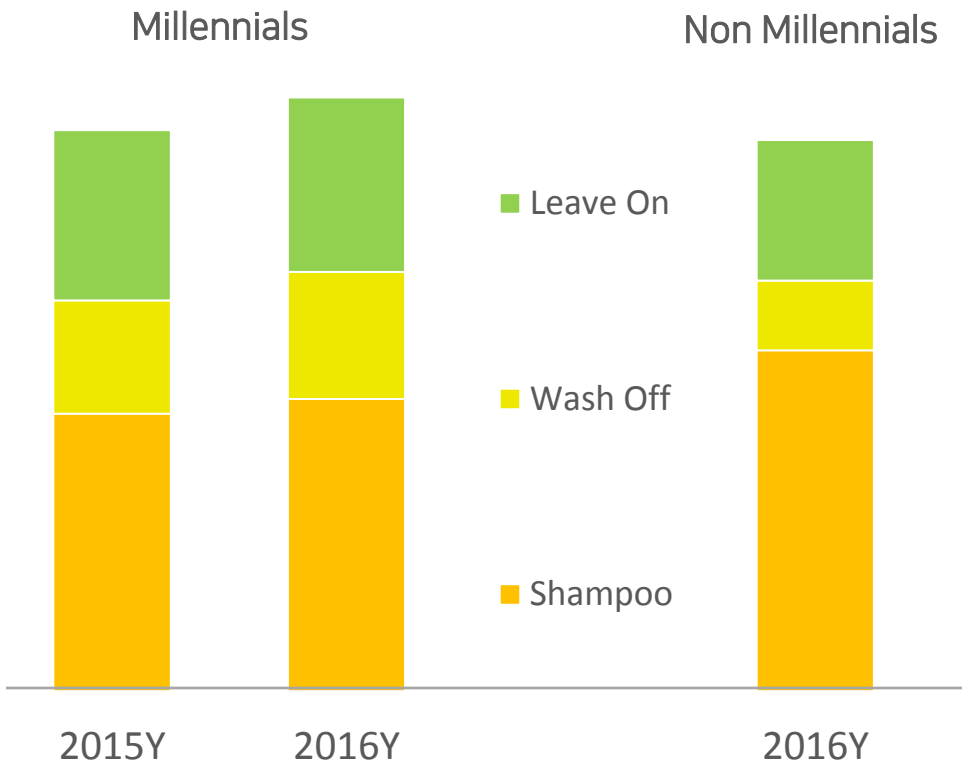
TV Home Shopping + Home Shopping Mall



Home Shopping Mall ONLY



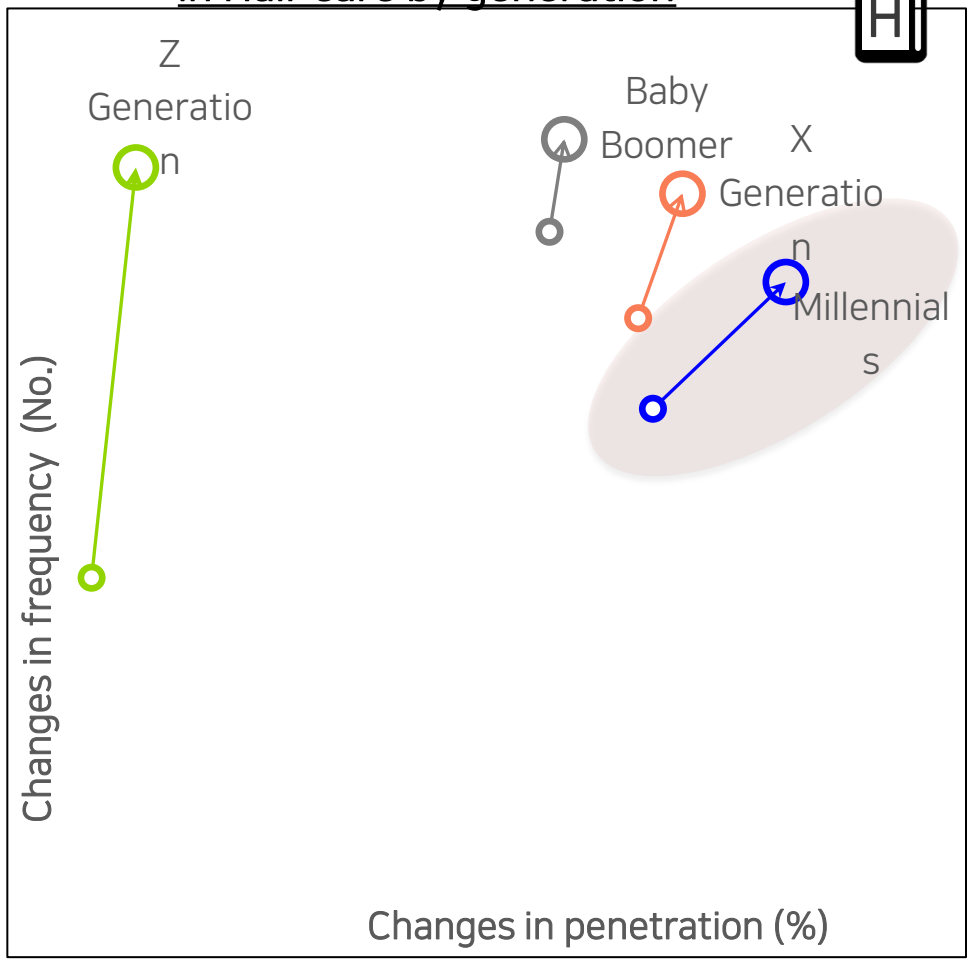
TV Home shopping + Home Shopping mall



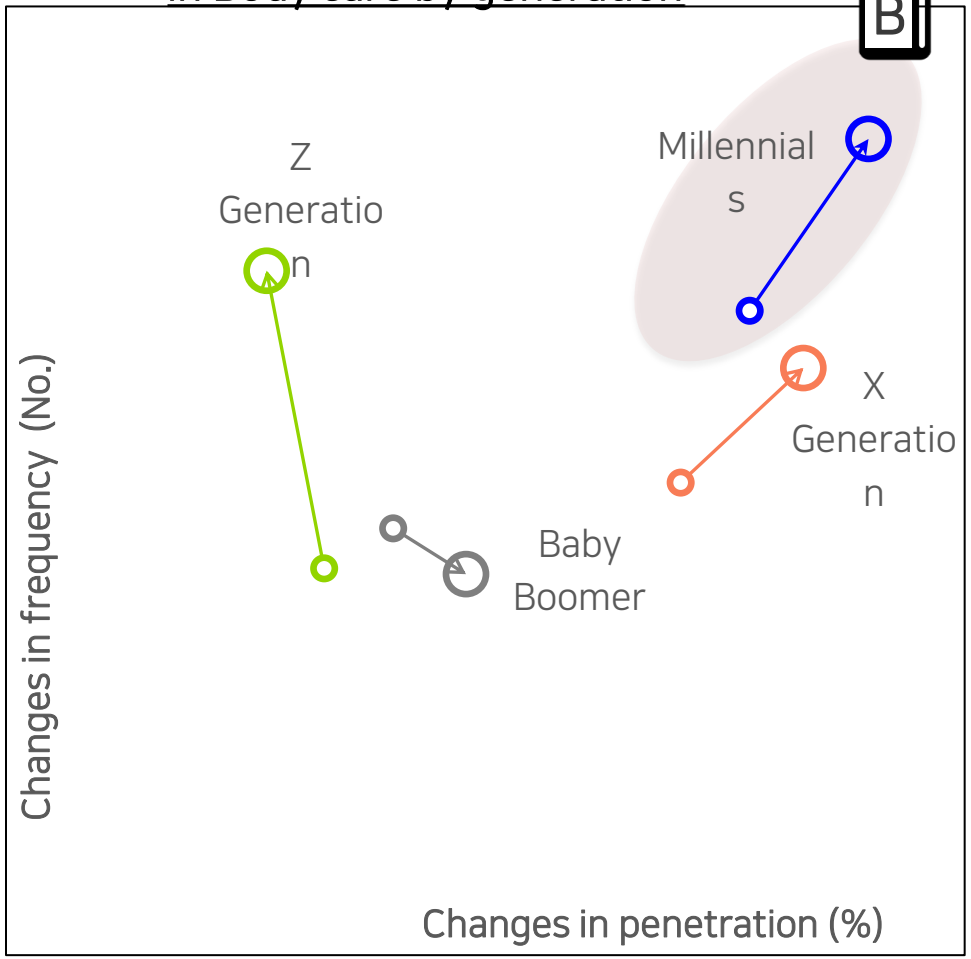
*Kantar Worldpanel Lady Panel (9,700 individuals), Total Haircare, Value %, Internet

Millennials expand Cross Over purchase pattern vigorously both in Hair/body care market

Changes in Cross Over purchase pattern in Hair care by generation



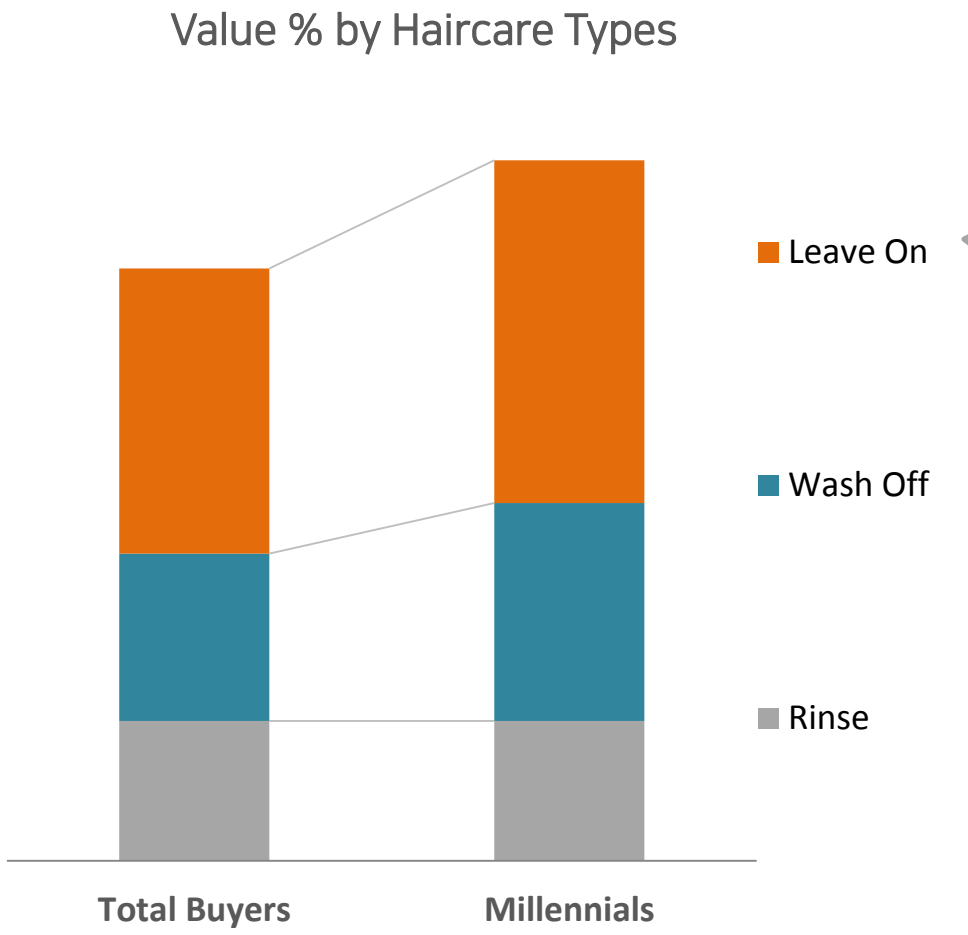
Changes in Cross Over Purchase pattern in Body care by generation

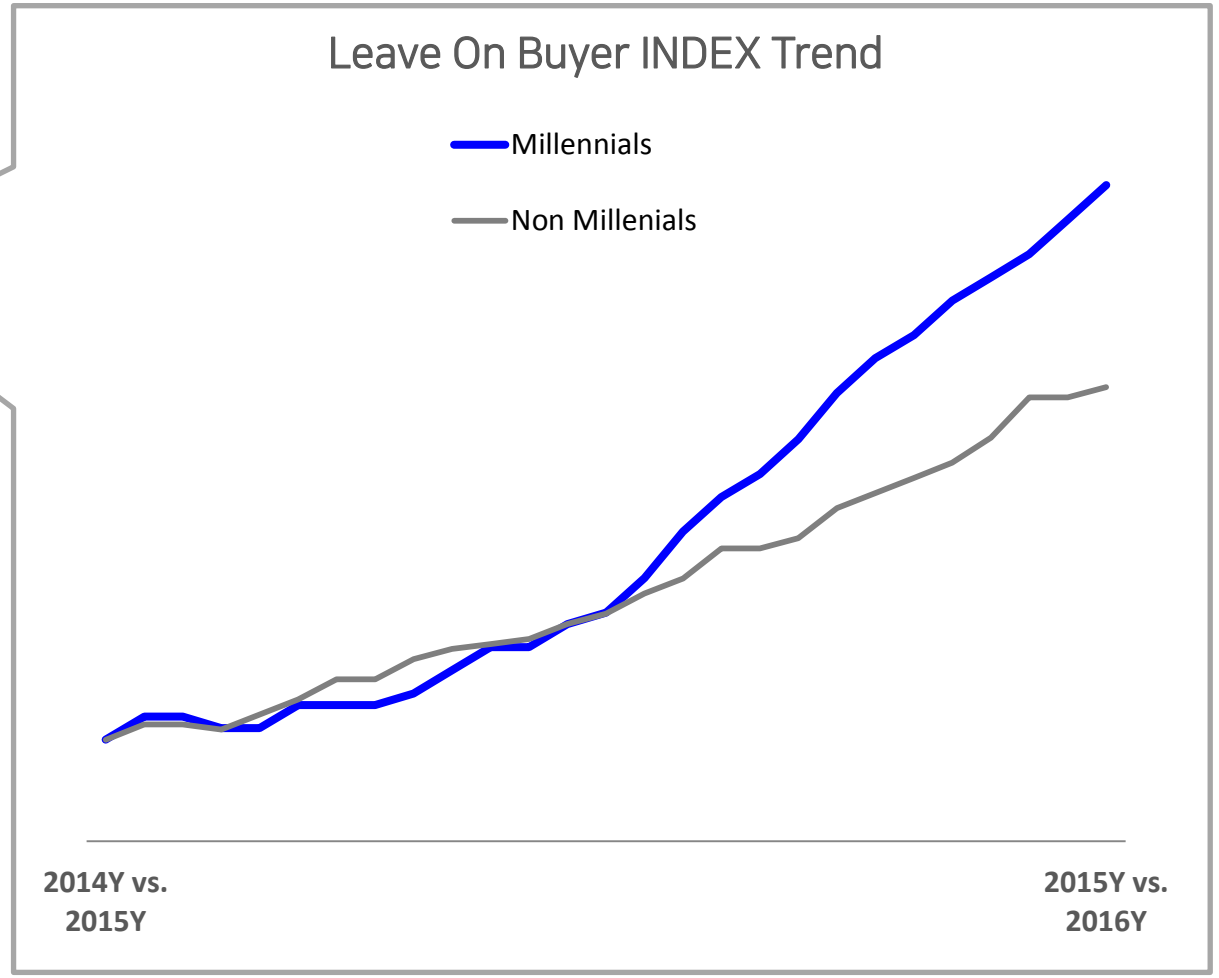


*Kantar Worldpanel Personal panel (9,700people), body moisture+ body wash, buyer/value, Hair/Body Y2016 online/offline Cross Over buyer, Direct sales

Trend
sensitive

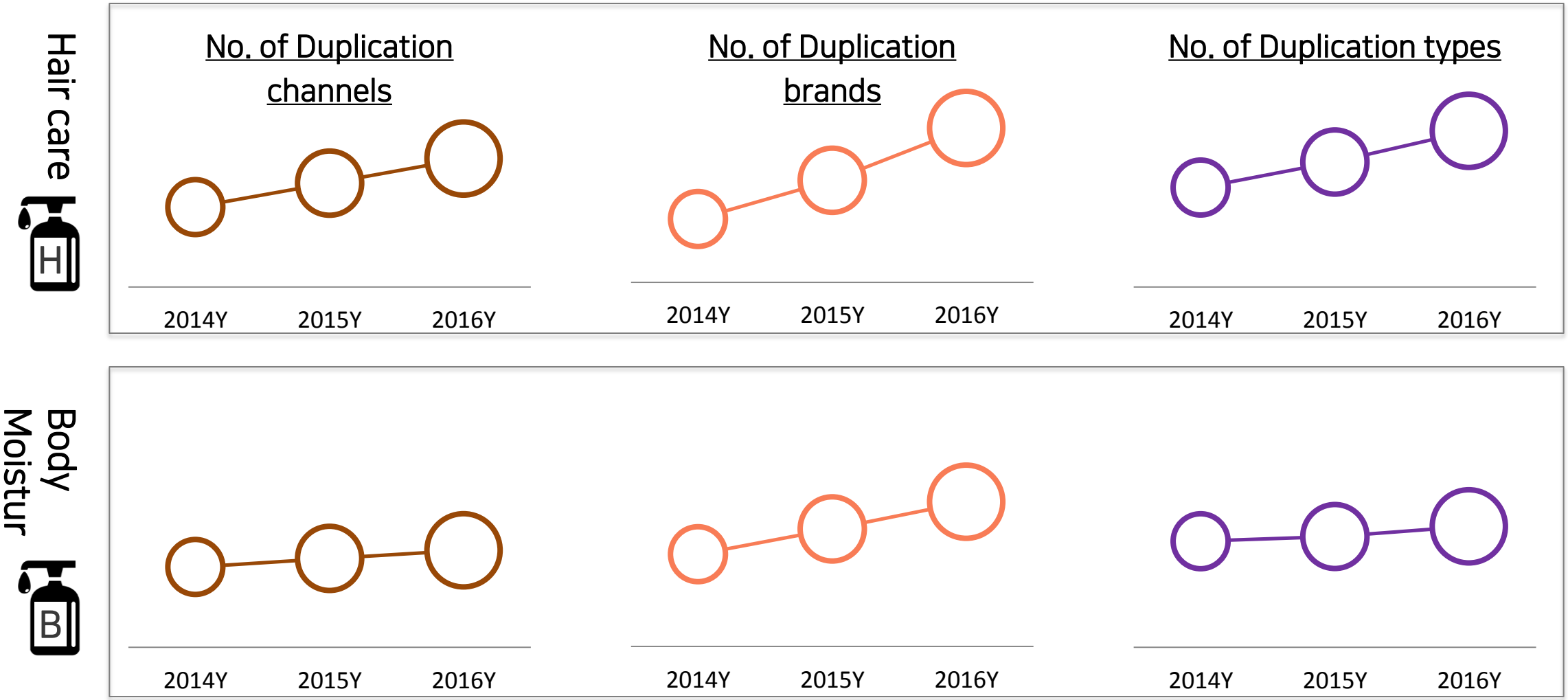
The value % of Millennials in treatment market is higher than that of total buyers, especially in Leave On market
Along with natural shampoo, 'trade-up' trend is clearly and rapidly demonstrated in Millennials





*Kantar Worldpanel Lady Panel (9,700 individuals), Total Haircare, Value/Buyers, Direct Purchase

Duplication usage of diverse channel touch points, brands, types increase mainly by Millennials compared to past
→ which demonstrates the feature of Millennials who are trend-sensitive



*Kantar Worldpanel Personal panel (9,700people), Hair care & body moisture, buyer, Millennials, Direct sales

[Reference] Body care Cross type product

애경 샤워메이트 "오일과 바디워시의 만남"... '프레쉬 오일 테라피' 출시

샤워메이트 프레쉬 오일 테라피는 자연에서 추출한 오일과 100% 식물유래 계면활성제 성분을 함유한 내추럴 바디워시이다. 특히 피부타입별 맞춤오일을 함유해 지성, 건성, 악건성 등 모든 피부타입에 사용할 수 있도록 개발된 맞춤형 제품으로 오일 특유의 끈적임 없이 바디피부를 촉촉하게 관리해주는 것이 특징이다.

오일이 피부에 잘 흡착될 수 있도록 도와주는 폴리머 기술을 적용해 샤워 후에도 마치 바디로션을 바른 듯 촉촉한 보습효과를 느낄 수 있다.

샤워메이트 프레쉬 오일 테라피 밸런싱 오일샤워는 바디의 부위별 피지가 고민이거나 유분케어가 필요한 지성피부용에 적합하다. 피부진정 및 스트레스 완화에 도움을 주는 티트리, 메도우폼씨, 베르가모트 등 열매오일을 함유했다.

샤워메이트 프레쉬 오일 테라피 모이스춰라이징 오일샤워는 샤워 후 건조함과 당김이 느껴지는 건성피부용 제품이다. 수분보호막 형성에 도움을 주는 바바수, 바오밥나무씨 오일 등을 함유해 바디피부에 영양공급과 보습에 탁월하다.

'명품향수'가 바디클렌저로…천연 퍼퓸 바디워시의 반란

천연화장품 전문 브랜드로 각광받고 있는 '천사연구소'에서 바디클렌저 신제품이 출시되어 화제가 되고 있다. 한경 비즈니스 주관 '2014 여성소비자가 뽑은 프리미엄 브랜드', '2015 고객이 신뢰하는 브랜드' 천연화장품 부문 대상을 2년 연속 수상한 천사연구소의 '아르덴테 지미 바디워시'는 피부 진정과 보습에 탁월한 보성 녹차수 63%를 베이스로 천연 유래 성분을 사용한 자연 유래 천연바디워시이다.

[Reference] Combined types/functions of haircare products

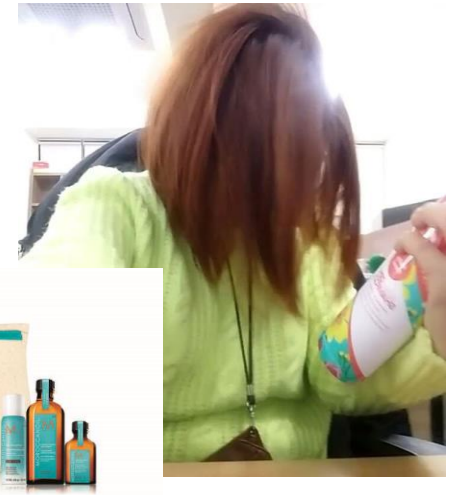
작은얼굴 빠르게 만드는 ‘헤어섀도우’ 인기
울퉁불퉁한 헤어라인 시술없이 작고 입체 얼굴 연출

최근 화장품 시장에서는 이러한 헤어라인에 콤플렉스를 가지고 있는 소비자들을 위해 헤어라인 섀도우 제품들을 출시하고 있다. 쉽고 빠르게 예쁜 헤어라인을 연출해 줄 뿐 아니라 저렴한 가격대로 소비자들에게 큰 사랑을 받고 있다. 비어 보이는 헤어라인을 촘촘하게 채워 주는 헤어라인 섀도우 제품들이 인기를 얻고 있다

물 한 방울 없이 머리를 감는다
바쁜 현대인은 드라이샴푸, 스프레이샴푸를 쓴다

파우더 방식의 드라이 샴푸
파우더가 두피와 헤어의 오일을 흡수하는 방식의 샴푸다. 파우더를 제거하는 과정에서 빗질이나 드라이기를 사용해야 하므로 스트레이트 헤어에 적합하다.
액체 형식의 드라이 샴푸
알코올이 주 성분으로 두피에 바르면 시원한 느낌이 난다. 악취의 주 원인인 박테리아를 멸균함으로서 두피와 헤어를 청결히해주는 샴푸다.

30분 더 잘까 말까, 머리를 감을까 말까, 드라이어로 말릴까 말까. 당신의 고민과 귀차니즘을 한번에 해결해줄 새로운 샴푸의 정체를 밝힌다.뿌리기만 하면된다. 칙칙!



[Reference] Body care trendy product and Package design

'향기'에 취한 바디제품 시장 '후끈'

향 관련제품 매출 급증하면서 해피바스·온더바디·입큰 등 향기 트렌드 바디제품 잇따라 선봬

향 바디 제품

디자인·제형·성분까지..톡톡 튀는 뷰티 제품 '눈길'

'바나나 우유' 모습 재현, 라운드어라운드 '바나나맛·딸기맛 우유 바디 로션'

KR Households total

Clothing Food Housing

Professional New Product Niche channels to experience

Expansion of M-commerce due to pursuing convenience

Increase in eco-friendly spending

Millennials that knows to spend wisely for themselves & family

Enhanced social status of women

Efficient spending due to economic recession

Thank you
NEXT

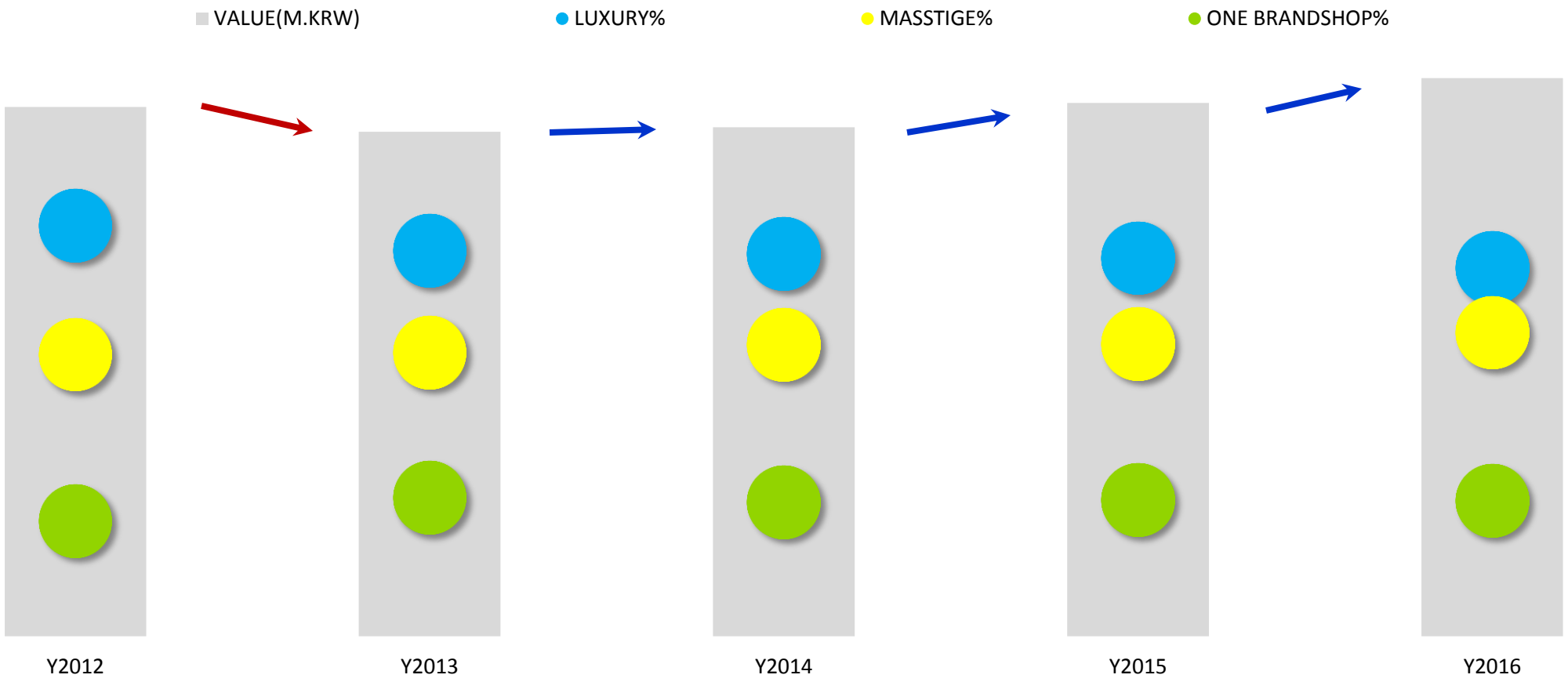
KANTAR WORLDPANEL

LECTURE 6.
Korean Cosmetics Market Trend

Lee, Kibeum

Kantar Worldpanel Beauty
Insight Senior Account Manager

Masstige Segment is Leading Korean Beauty Market Growth



Volume Growth in Skin Care, Value Growth in Color Cosmetics

Skin Care

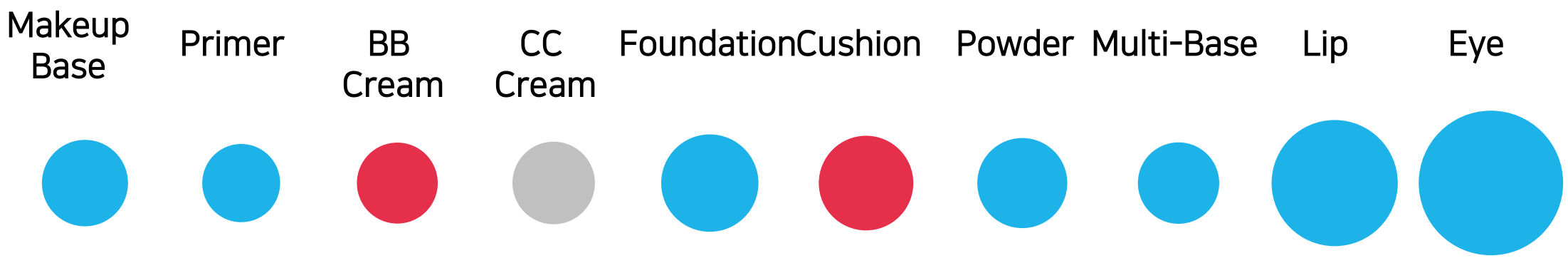
15 vs. '16 GR.

Make Up

15 vs. '16 GR.

Number of Make Up Category Purchase Increased

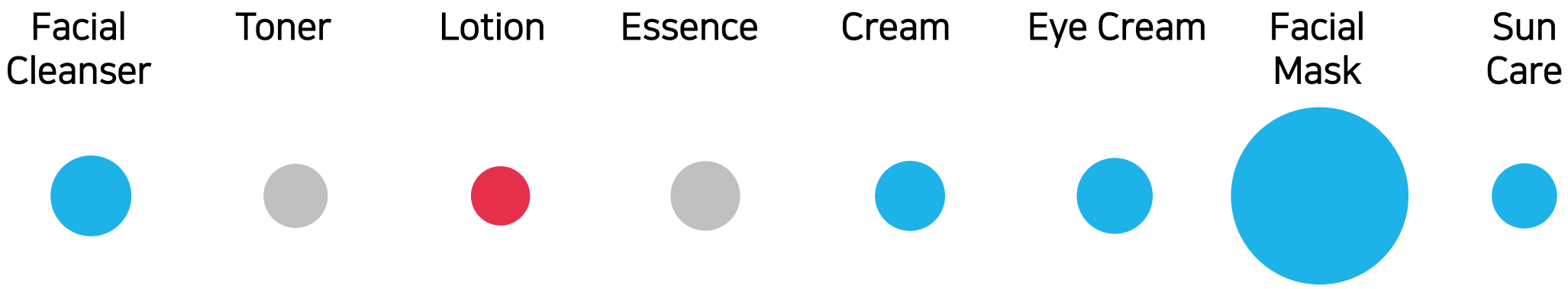
Average Volume purchased per buyer (Units)



Y2016, Blue : Gr above or equal to 3%, / Grey: -3%~+3% Gr/ Red: below -3% Gr

Number of Skin care Category Purchase Increased as well

Average Volume purchased per buyer (Units)



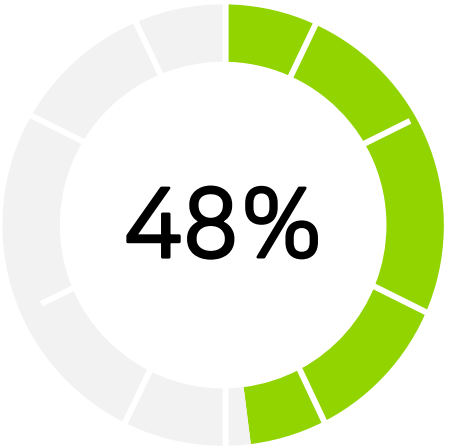
Y2016, Blue : Gr above or equal to 3%, / Grey: -3%~+3% Gr/ Red: below -3% Gr

Usage Change in Skin Care Categories

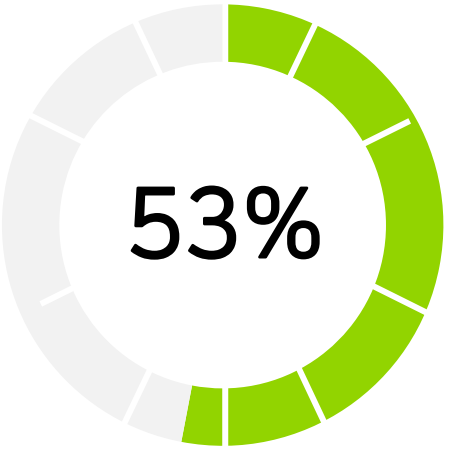
Average number of skin care products increased as morning and evening has different skincare rituals.

Usage Comparison (Morning/Evening)

2015 H1

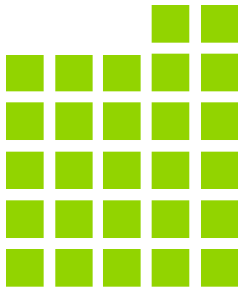


2016 H1

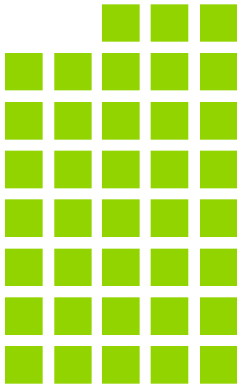


Skin Care Average Volume per Buyer

2015



2016



Contribution of people using different skin care types morning/evening

Excl. Gift & giveaways

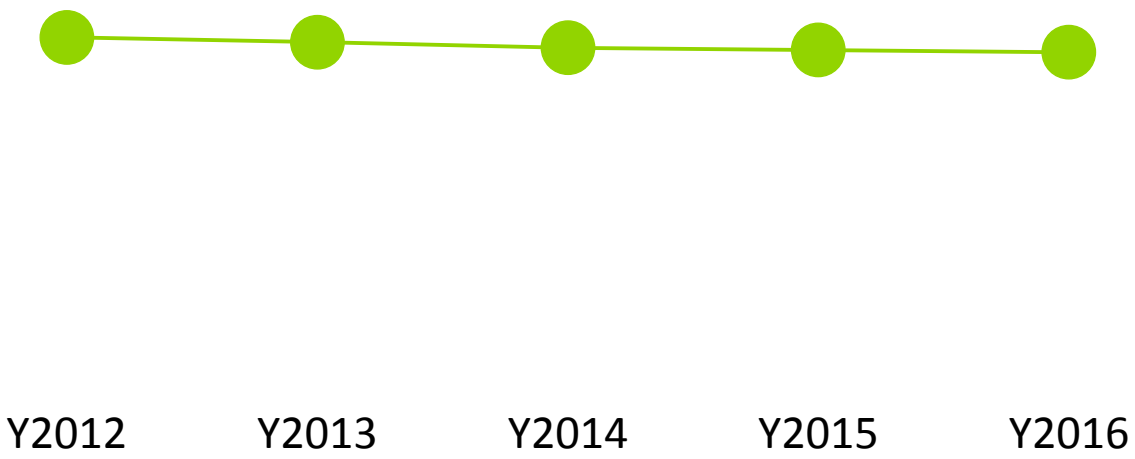
Simplified Skin Care Steps

Simplified Skin Care Steps

31%

Consumer answered they have reduced the skin care steps than a year before

Average number of Skin Care Categories



1) Open Survey
2) Kantar Worldpanel Beauty Panel

Diversification Of Texture Has Led The Range Of Product Usage

	Cleansing	Toner	Lotion	Essence	Cream	Eye Cream	Sun Screen	Facial Mask
Same Step, but different texture	Water			Regular			Lotion/ Milk	Sheet
Occasion-based usage resulted in the importance of product texture	Water			Oil			Stick	Sheet
	Tissue			Ampoule			Gel/ Essence	Wash-off
	Mixture						Lotion /milk	Sleeping Mask
	Oil						Cushion/ Balm	Mixed

Korean Beauty Market Keyword

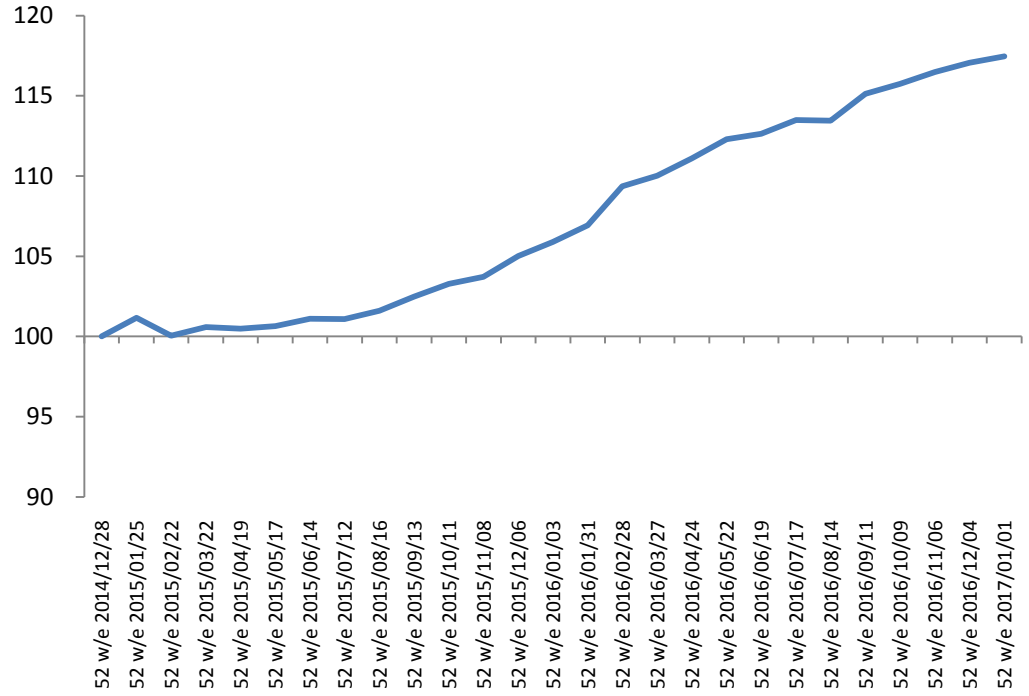
Texture Care

It is An Era of Texture Play

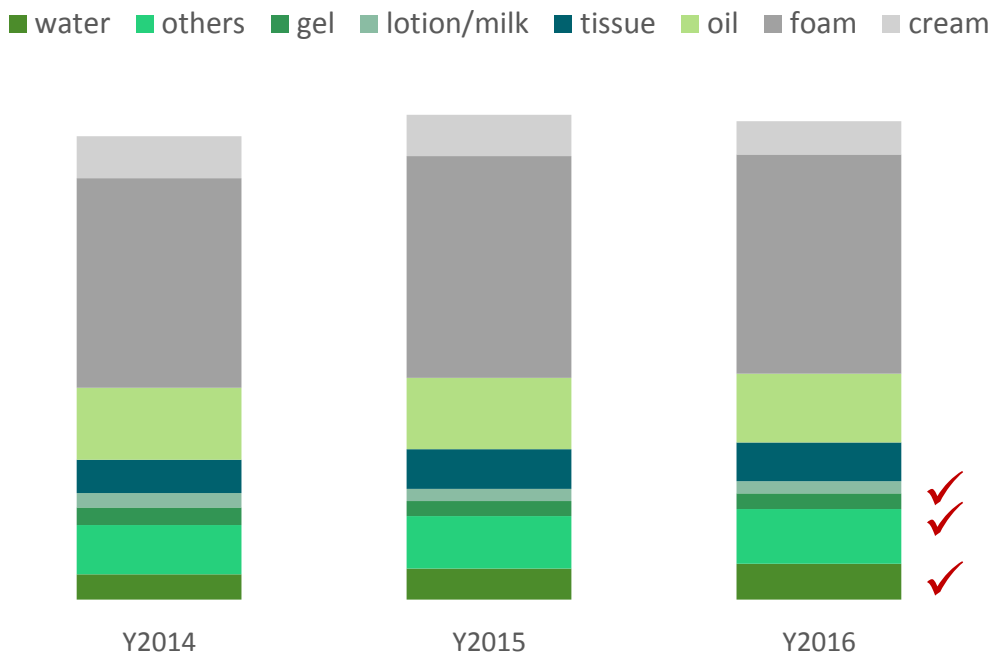
Texture of 1st Cleansing has been diversified

Cleansing Category is on the rise along with the growth of Make Up

Make up Purchase occasion evolution (Index to Y2014=100)

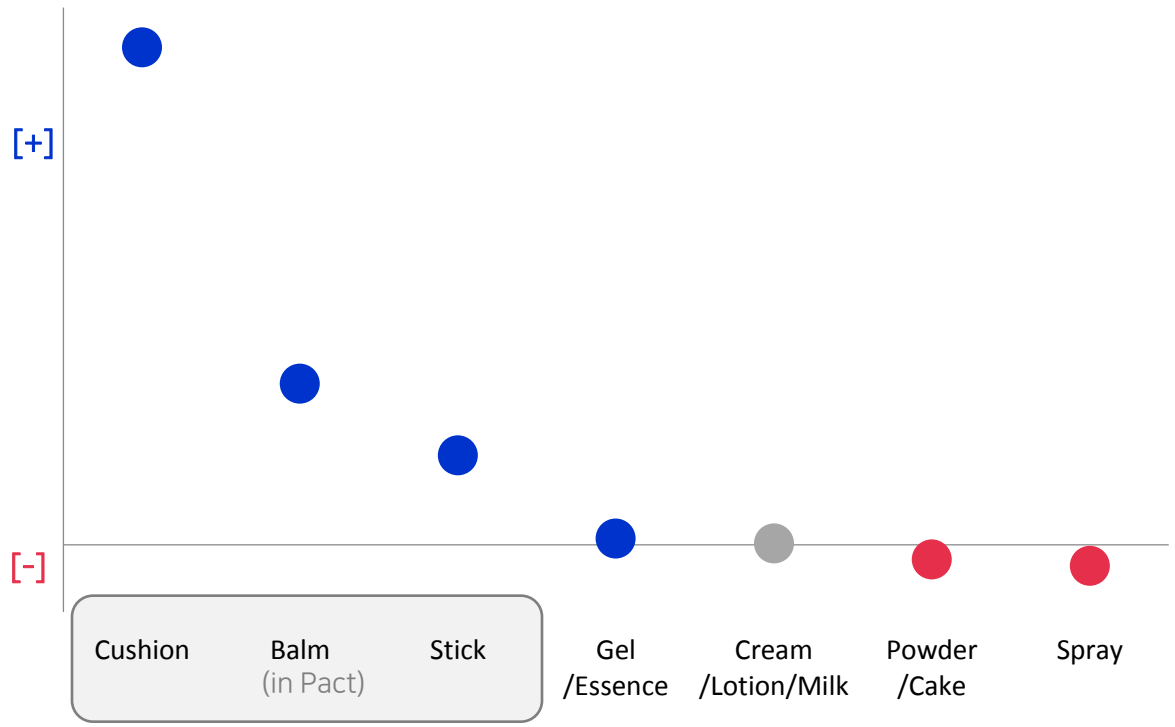


Facial Cleansing Penetration % by sub-categories

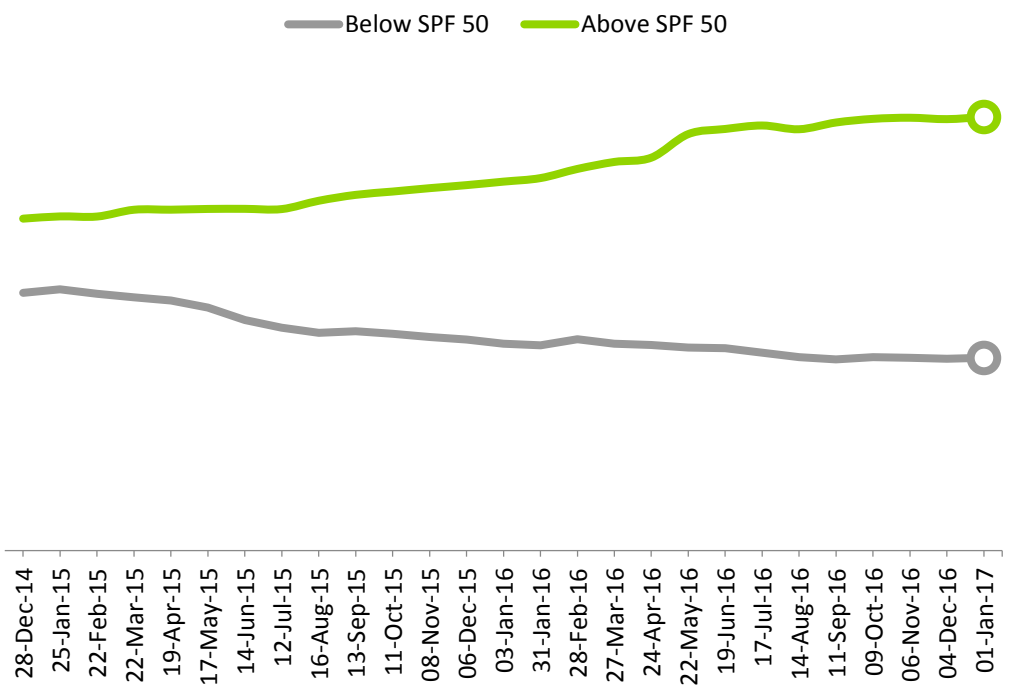


Sun Care Also Showed A Big Growth Thanks To Texture Diversification

Occasion Gr% by Sun care sub-categories



Occasion revolution by SPF[1)]



1) Latest 3 years 52 w/e rolling, Dermo Skin Care

Base Make Up Texture Diversification

Powdery Texture

Light Texture

Airwear Protexture Foundation

Sheer Fluid Foundation

Jasmine 3D Jelly Foundation

Bounce up Pact Ultra

Balm Texture

Lip Make Up Texture Diversification

Water

Oil

Pencil

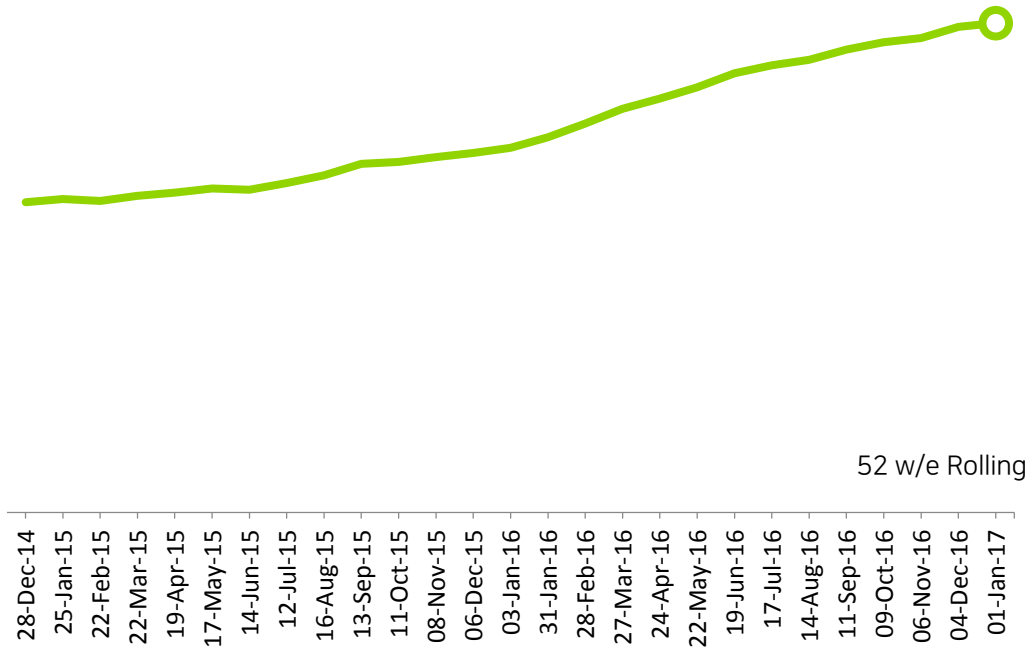
Korean Beauty Market Keyword

Texture Care

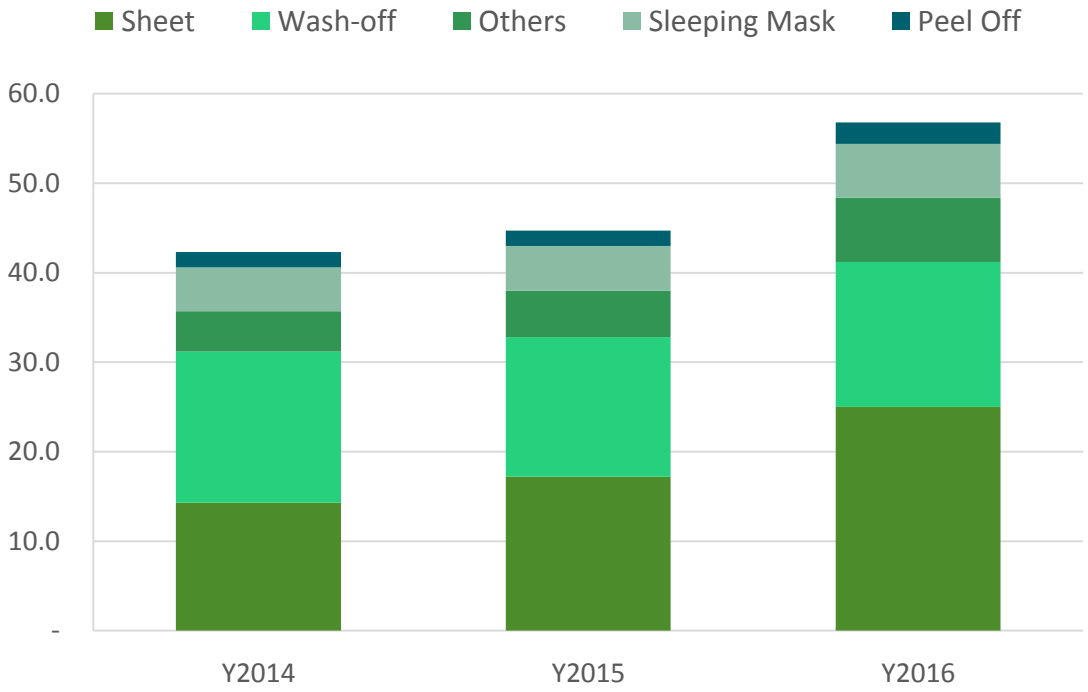
Occasional Care

Facial Mask has increased by convenience of usage on skin condition

Facial Mask Occasion Evolution ('000)



Facial Mask Penetration% by Sub-Categories



Take Proper Action Upon the Skin Condition/ Problem of the time

키엘

아포테커리 맞춤 에센스

가격 30㎖ 12만8000원대

키엘 전문 상담원 KCR이 피부 상태 체크용 북 '스킨 아틀라스'를 사용해 피부 고민을 상담한 후 제작돼요.
주름, 모공결, 피부결, 미백, 수딩 중 두 가지 피부 고민 해결을 돕는 앰플을 섞어 완성하죠.
제품 보틀과 패키지에 이름과 상담 정보, 제조 날짜가 적힌 '맞춤 라벨'이 부착돼 더욱 특별해요.

Cosmetics Usage Diversifies by TPO (Time, Place, Occasion)

Cosmetics Usage Diversifies by TPO (Time, Place, Occasion)

Korean Beauty Market Keyword

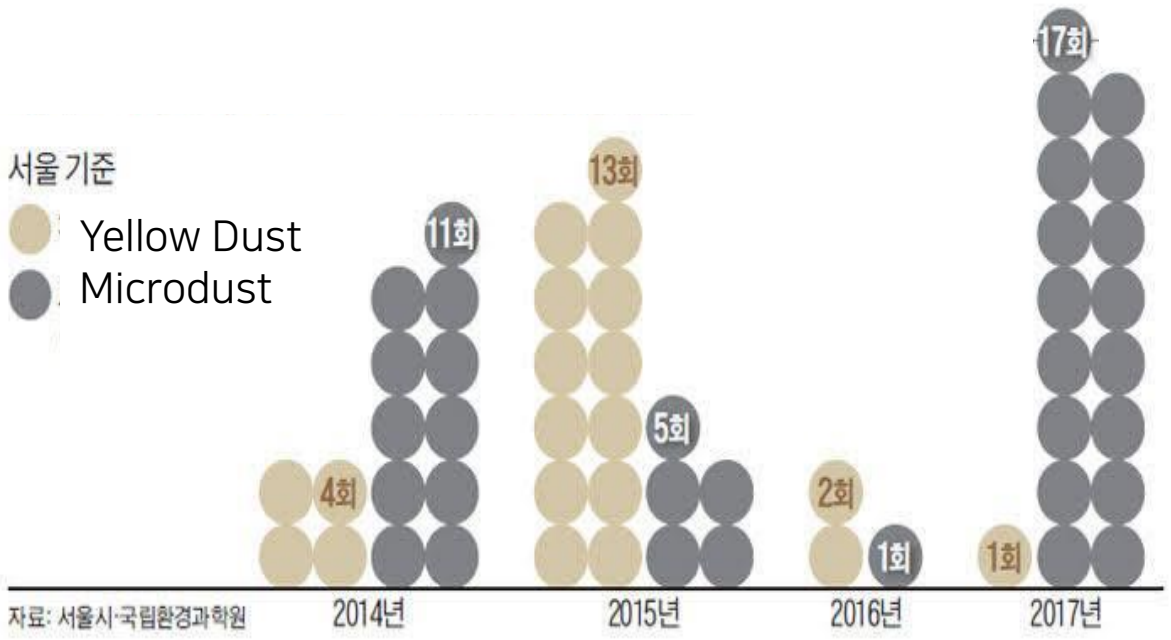
Texture Care

Occasional Care

Minimal Care

Skin Is Easily Irritated By Harmful Element In The Environment

Yellow dust/Micro-dust Occurrence (Latest 4 years January-March)



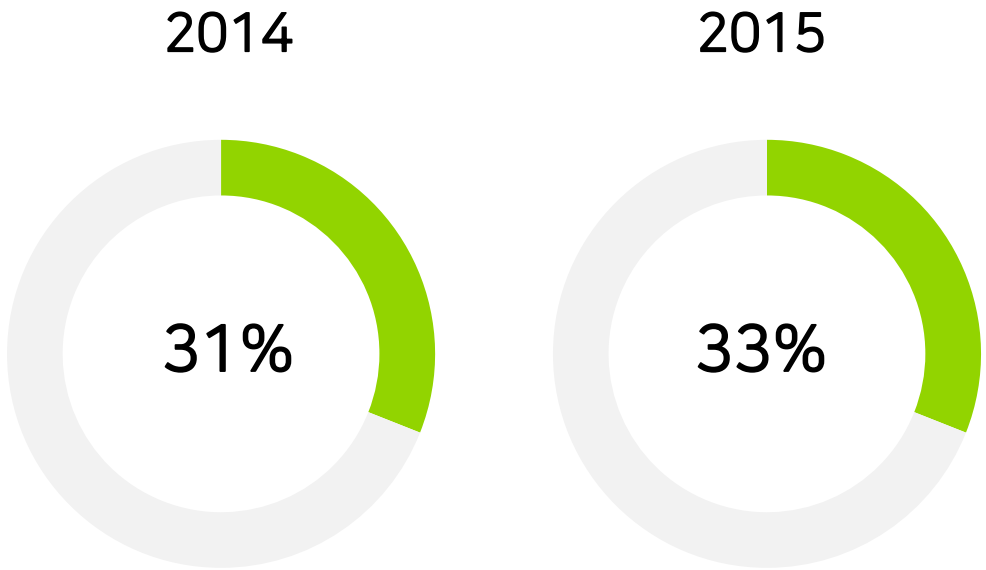
Keywords relevant to Micro-dust(Top 10)

1) Source: Chosun.com 'Microdust over yellow dust.due to Northwester' | 2017. 4. 6
2) Kantar Worldpanel Survey (n=3,000), Have you received any professional skin care treatment in the past 6 months?

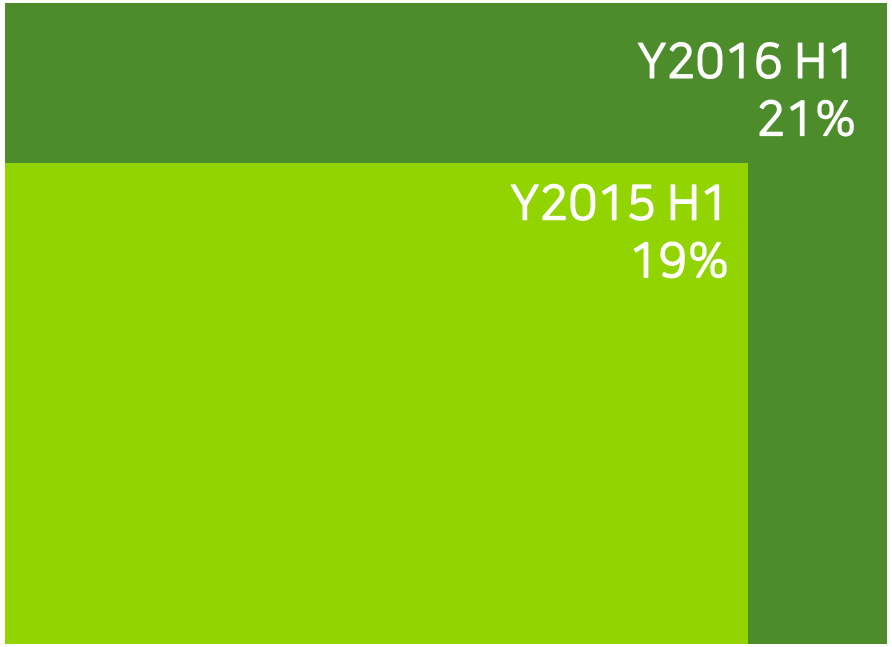
Skin Irritation by External Factor

Skin sensitivity is on the rise due to Harmful Environment and other external factors

Professional Skin Treatment Penetration%



Sensitive Skin Type



Product Focusing On Skin Stability Has Been Launching

Products with Safety Certificate

Products With Minimized Chemical Ingredients

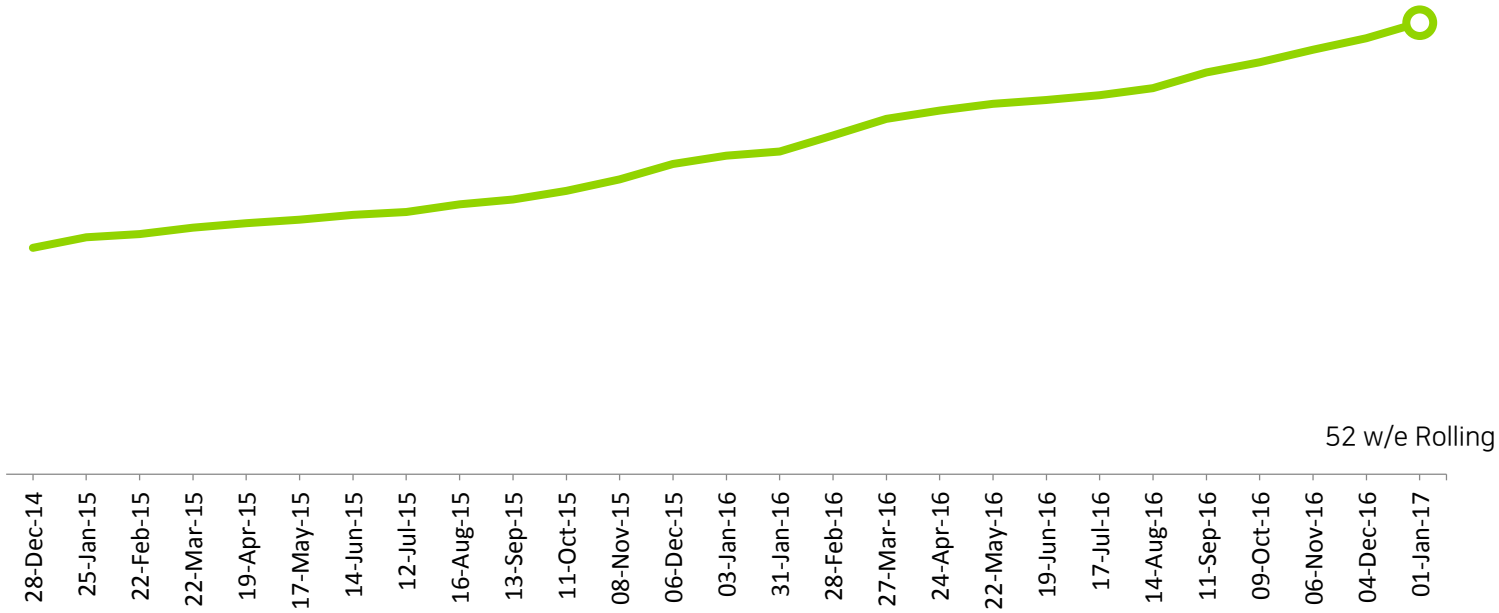
Product Launch For Sensitive Skin Is On The Rise

Protection

Dermocosmetics on the rise along with the increasing skin sensitivity

Dermocosmetics contribution to Skin Care(Value%)[1)]

Dermocosmetics Traffic evolution[2)]

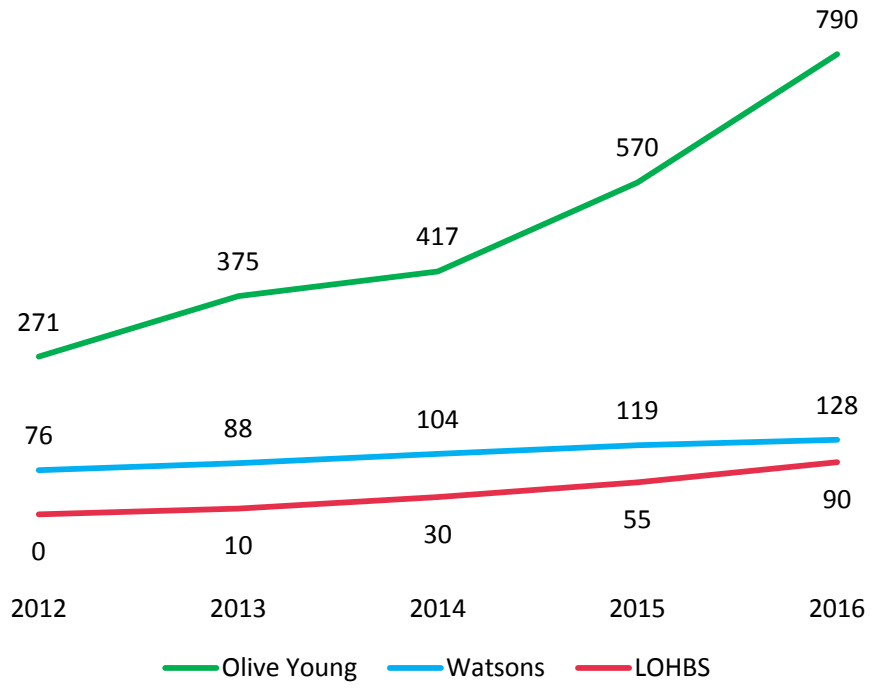


KANTAR WORLDPANEL

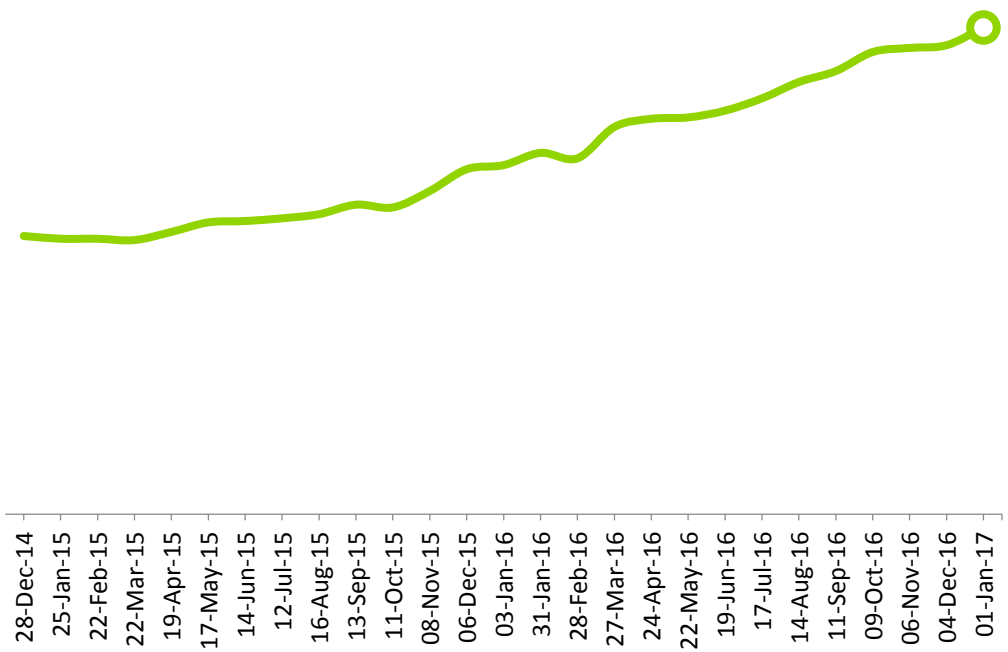
1) Kantar Worldpanel Survey (n=3,000), Please chose your own skin type
2) 52 w/e rolling, Derma Skin Care, excl. Gift&giveaways

Drugstore Expansion Accelerate the Growth

Number of Drugstore Branches (Units) [1)]



Drugstore Contribution to Drugstore Channel(Value%)



1) Kyunghyang Biz, “Korean Style Drugstore War amongst Retail Dinosaurs”, 2017. 3. 19

Korean Beauty Market Keyword

Texture Care

Occasional Care

Minimal Care

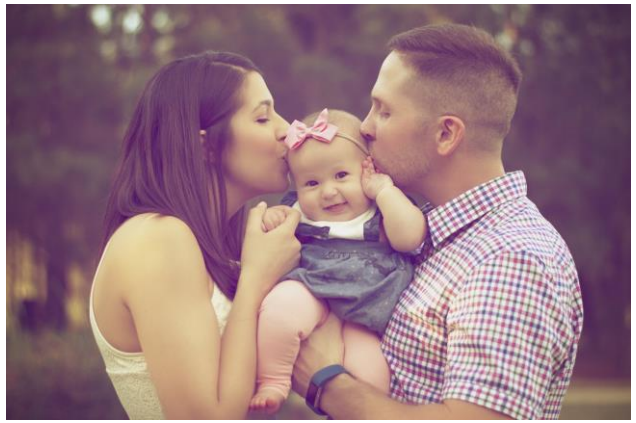
KANTAR WORLDPANEL

LECTURE 7. Beauty Consumption Behavior of Korean Millennials

Shin, Koeun
Kantar Worldpanel
Beauty Insight Team Manager

Who is Millennial consumer?

Birth Year



Born in Early 1980s-
Early 2000s

Life

Digital natives

High education rate

Now?

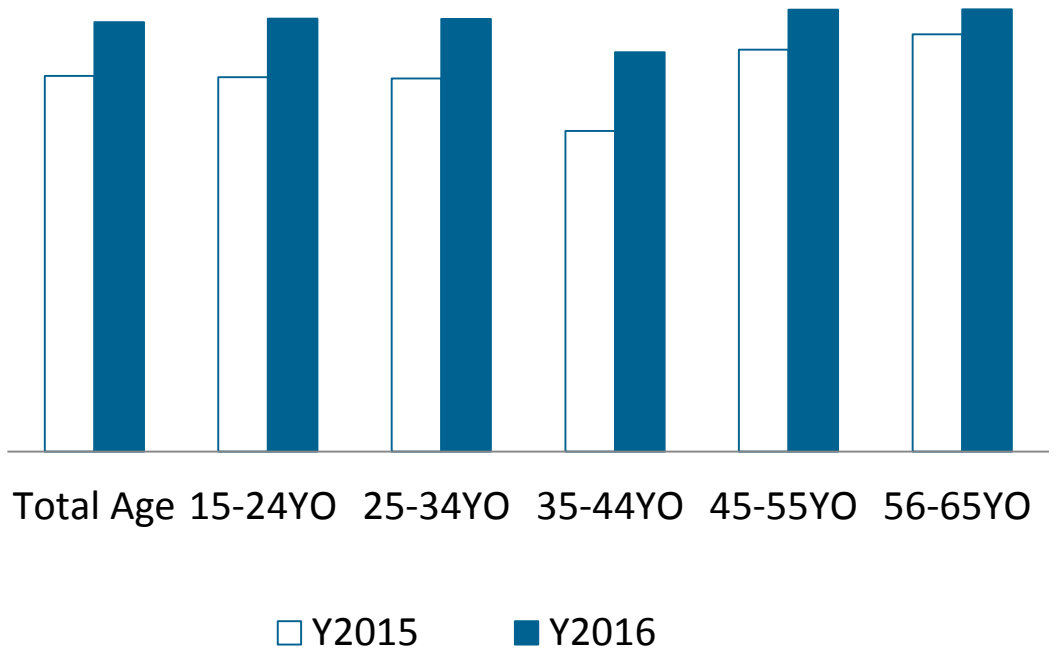
Always connected

Not enough income

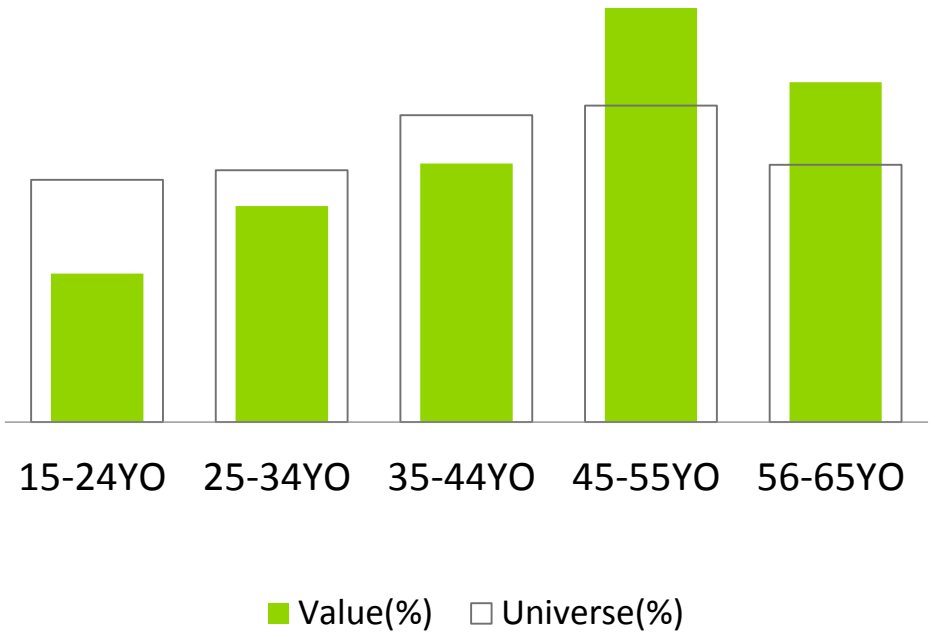
Source: Goldman Sachs Report

Purchase many cosmetics despite insufficient disposable income

Average Cosmetics purchase volume per buyer by age (Unit/person)



Cosmetic purchase contribution by age (value%), 2016



Source: Kantar Worldpanel Beauty Panel

Characteristics of Consumption Behavior

Sharing than Purchasing (Online)

Me before Us

(Product)

Push than Pull

(Brand)

Process than Result

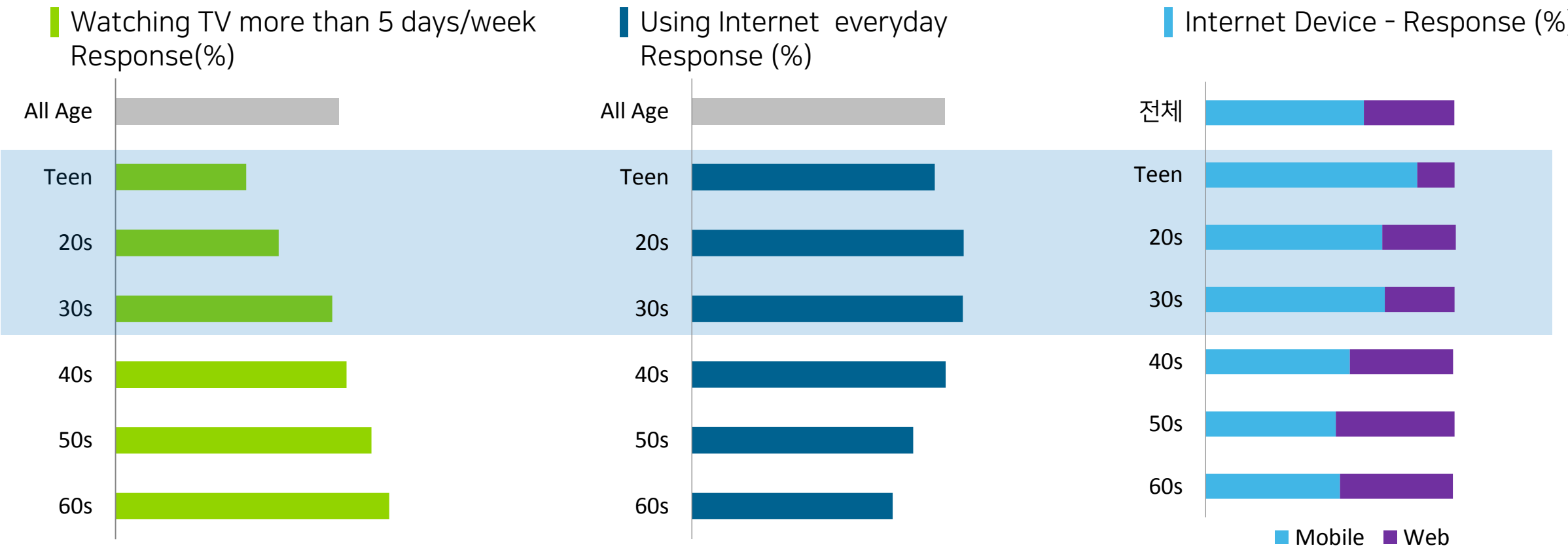
(Channel)

Sharing than Purchasing

airbnb

2030s consists 77% of Total User
(Source: Gyeonggi Research Centre)

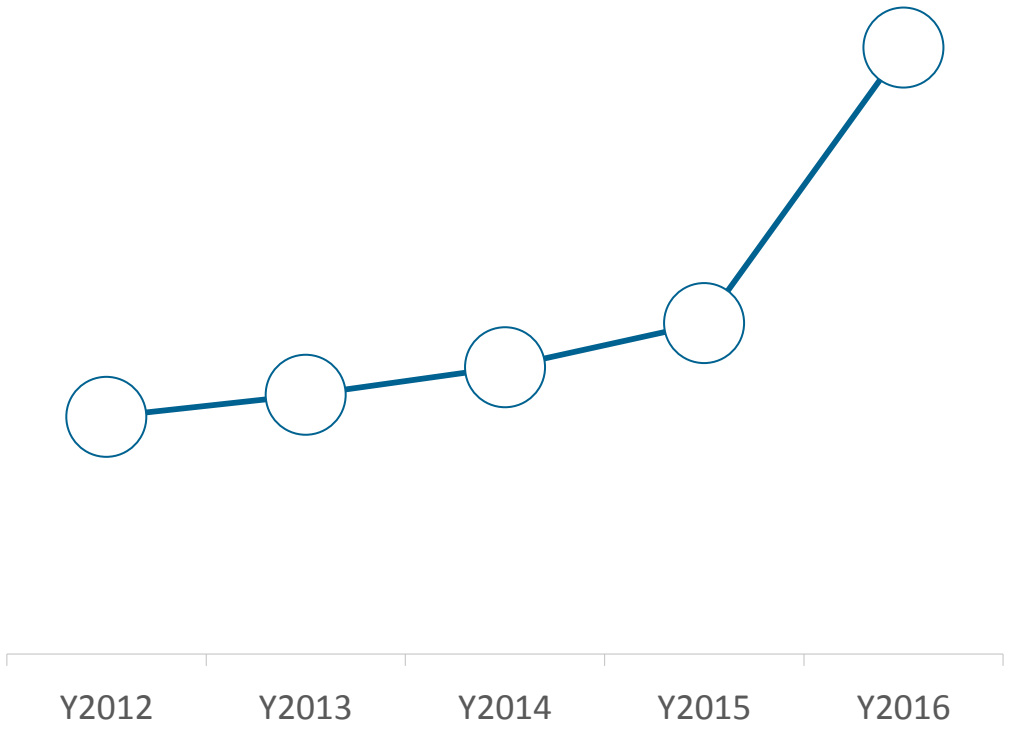
We are the Digital Natives



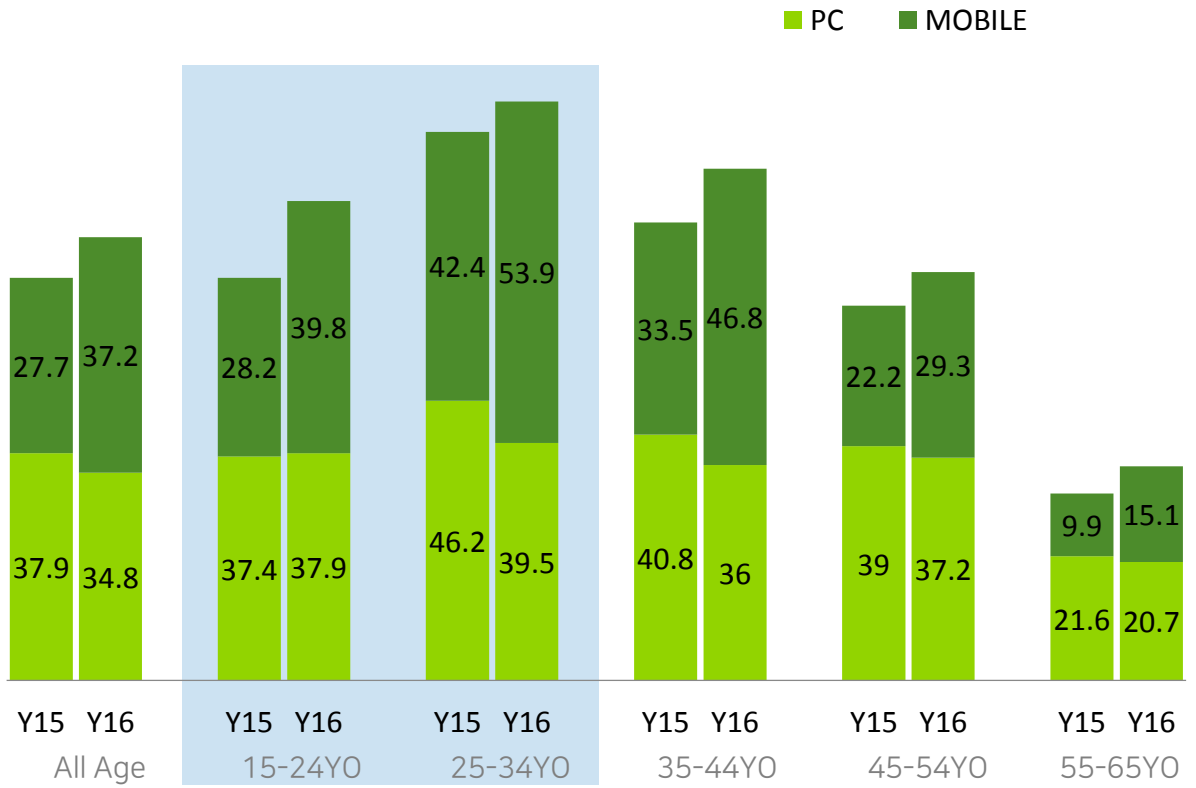
Source: Kantar Worldpanel Media Habit Research, April 2016

Rising Mobile Shopping

Online Channel Penetration(%)

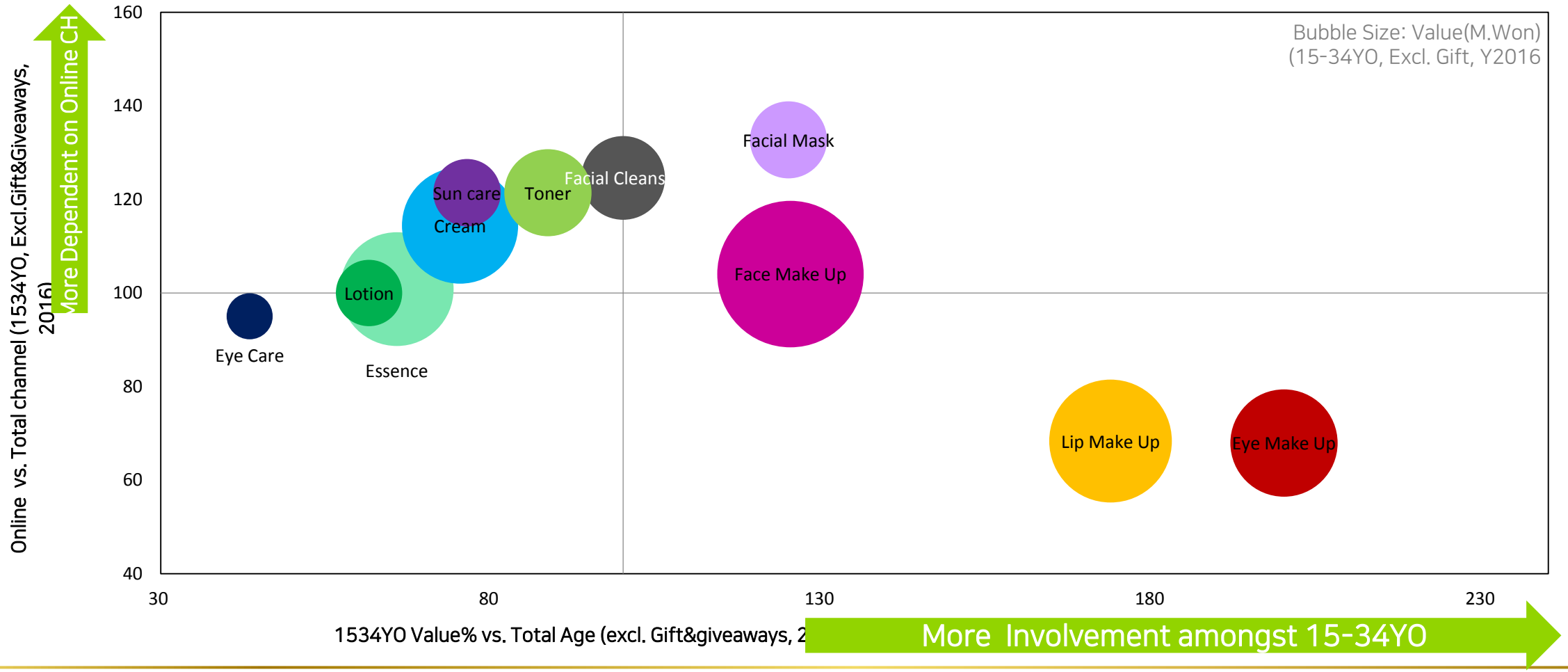


Online Penetration Evolution by Age/Devie(%)



Source: Kantar Worldpanel Beauty Panel I Y2012- Y2016 I Online=100%

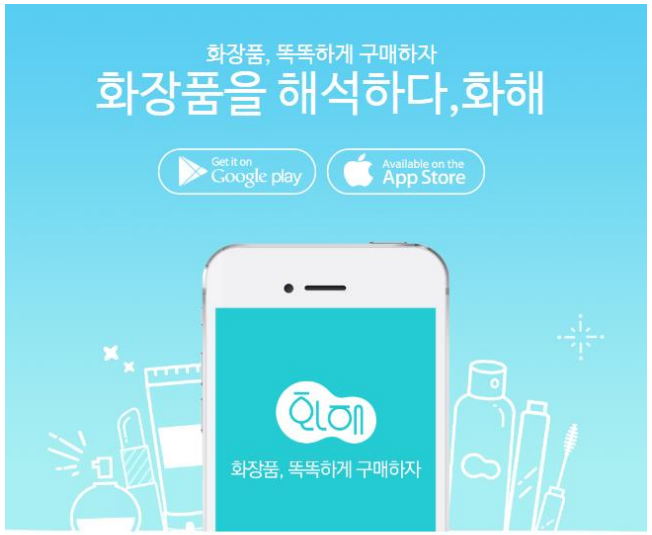
Skincare and Face Makeup are the Mostly Purchased Categories



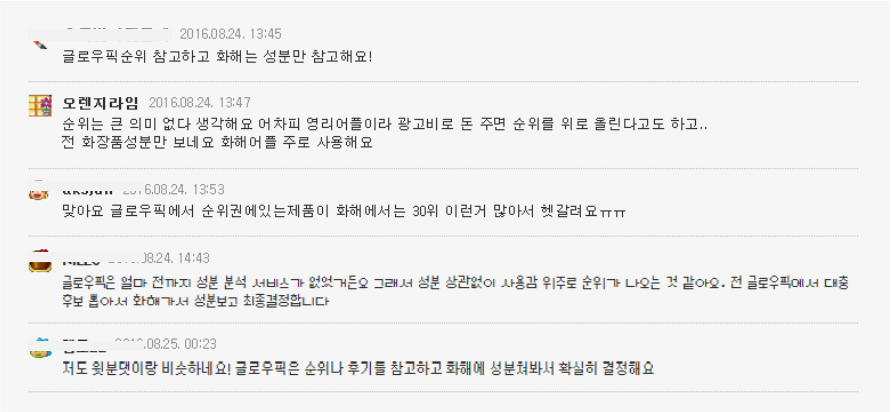
Source: Kantar Worldpanel Beauty Panel I Y2016 I 15-34YO =100% I excl. Givt&Giveaways

What does Online mean for Millennials?

Soruce: Glow Pick Website



Source: HwaHae Website

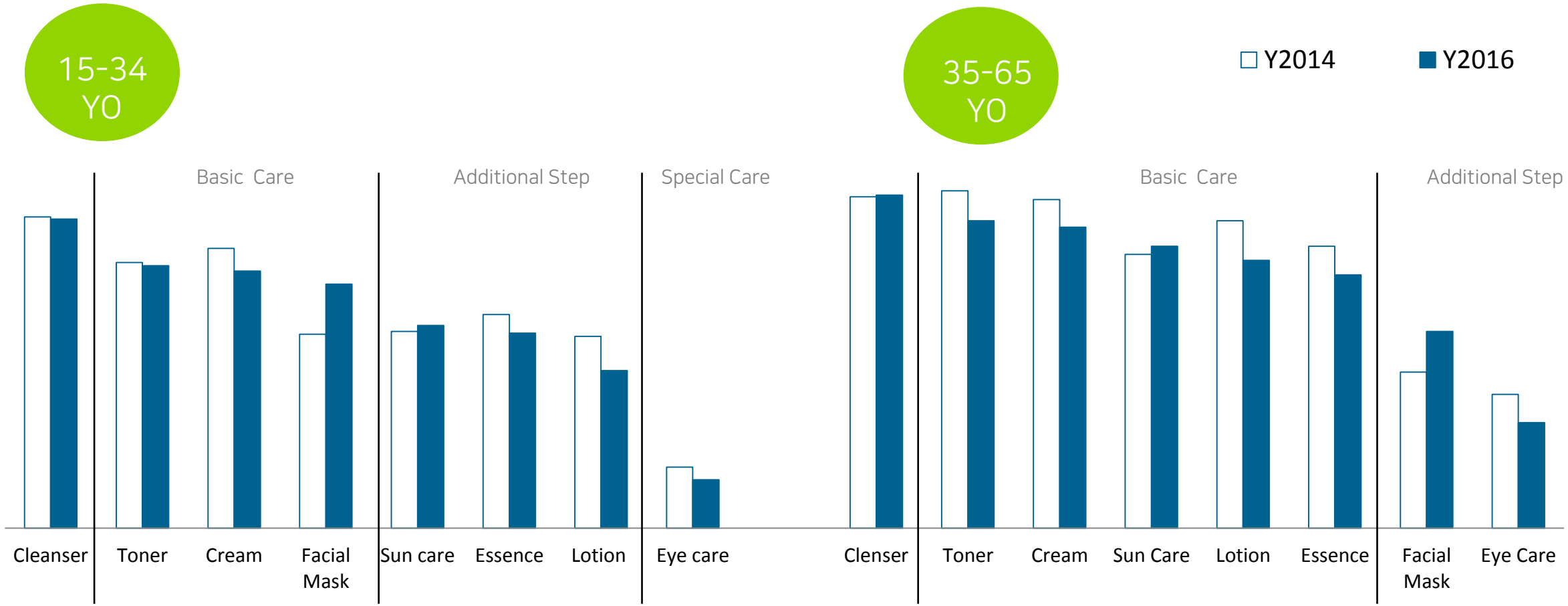


Source: Naver Café Powder Room

ME Before US

Simplifying Skin Care Step

Penetration% by Categories



Source: Kantar Worldpanel Beauty Panel I Latest 3 years I Buyer I Skin Care I excl. Gift & giveaways

Meanwhile, Each Step Is MORE PURCHASED Ever Than Before

Average Consumption per Buyer on type

15-34YO

	GR%
Facial Cleanser	+6.6
Toner	+9.1
Lotion	+5.3
Essence	+5.1
Cream	+5.3
Sun Care	+9.0

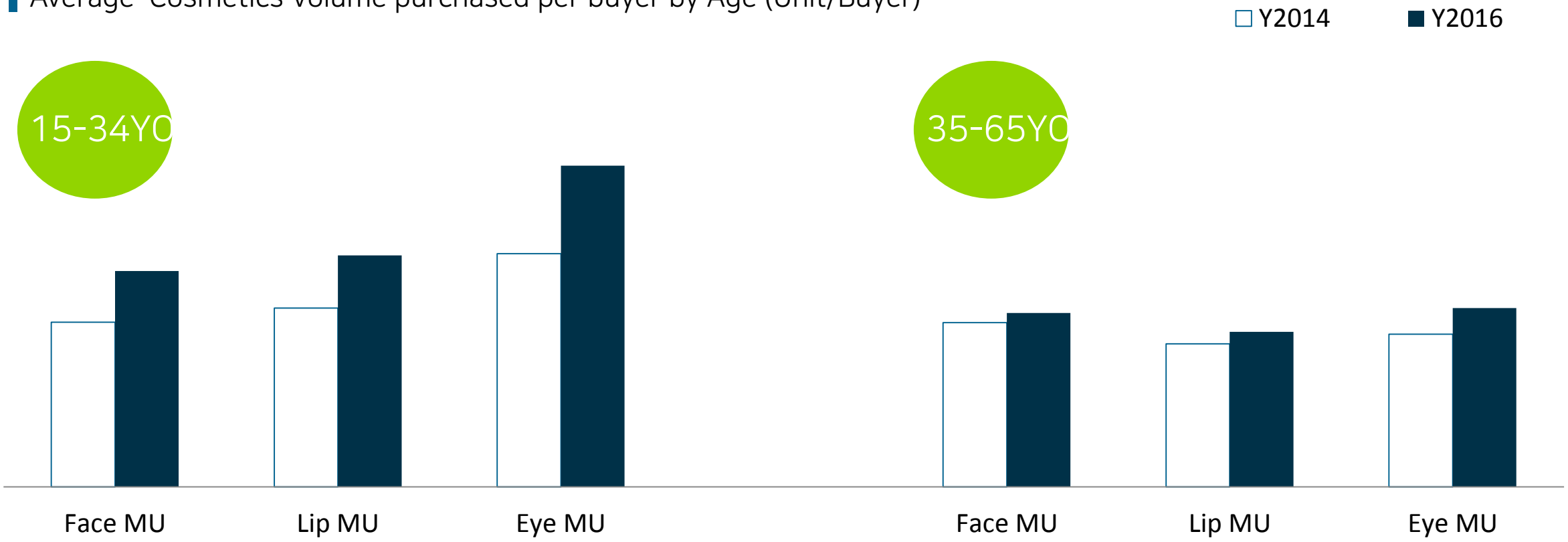
35-65YO

Penetration%	GR%
Facial Cleanser	+7.2
Toner	-1.2
Lotion	-3.1
Essence	+9.4
Cream	+5.2
Sun Care	+12.2

Source: Kantar Worldpanel Beauty Panel I Latest 3 years I Average Volume/ buyerI Skin care(excl. Eye Care, Facial Mask) I excl. Gift&Giveaways

Active Color Play by 15-34YO

Average Cosmetics Volume purchased per buyer by Age (Unit/Buyer)



Source: Kantar Worldpanel Beauty Panell Latest 3 years I Average Volume/buyer I Make Up

Colorful Lifestyle, Make Up by Occasion

Student Makeup

Office Make Up

블로그

161008 데일리 메이크업(첫출근 메이크업!) 2016.10.09.
161008 데일리 메이크업(첫출근 메이크업!) 오늘은 비욘드 첫 출근날!! 와 진짜 겁나 힘들었어요...ㅋㅋㅋㅋㅋㅋ 거의 1년?만에 화장품 매장 일을 해보니 오래 서...
Dreamer of Empire blog.naver.com/dkimk?Redirect=Log&logNo=... | 블로그 내 검색

두근두근 첫출근 or 면접, 신입사원 메이크업/화장법 2015.03.10.
두근두근 첫출근 or 면접, 신입사원 메이크업/화장법 첫 인상을 뚜게 남기려면 예뻐야겠지, 라는 생각으로 이것저것 화장을 하다보면 오히려 과한 화장으로 부담이 될...
핫브랜드- Brand St... blog.naver.com/brandhot100?Redirect=Log&... | 블로그 내 검색

봄지기의! 첫출근 메이크업 2017.02.20.
첫출근 메이크업 맑고 촉촉한 피부와 과하지 않은 아이메이크업! 이것이 첫출근 메이크업의 핵심!!! 가장 먼저! 봄지기의 민낯을 준비합니다!!! 명청함.... 봄지기는...
아름다운 세상을 바... blog.naver.com/bom6006?Redirect=Log&logN... | 블로그 내 검색

첫출근할때 메이크업 2013.06.04.
첫출근 메이크업 새로운 만남을 할때는 호감가는 인상을 주는것이 무엇보다 중요하다 모두에게 거부감이 없는 인상을 주기위해서는 피부에 없는 색을 사용하는 것보다...
소소한 이야기 blog.daum.net/zmfla5/105 | 블로그 내 검색

#MOTD 첫 출근 메이크업 2017.03.18.
데일리 메이크업이니 재미있게 봐주셔요^_^♡Face 쿠션 : #클리오 #킬 커버 리퀴드... 슈에무라 소프트 에프 리콧 521번 맥 루비우 추천합니다! ㅎ! 그럼..오늘 메이크업 끝!!
인절미 블로그 blog.naver.com/jeolme2?Redirect=Log&logN... | 블로그 내 검색

Ski Resort Makeup

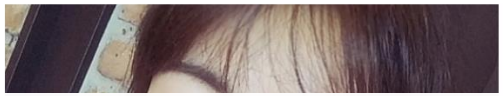
스키장메이크업 지속력이 중요! 2016.12.29.
특히 작년보다 일찍 추워진 날씨 탓에 스키장 오픈 스케쥴에 연이어 스키장메이크업에 관심을 갖는 분들이 많이 있답니다. 스키장에서 반짝반짝 빛나는 주인공이 되려면...
슬링의리뷰블로그 blog.naver.com/00_ji?Redirect=Log&logNo=... | 블로그 내 검색

스키장 메이크업 세미스모키룩으로 돋보이게- 2016.12.16.
저는 겨울을 정말 싫어하지만 보드타러가는건 정말 좋아해요 *.* 오늘은 리엔케이 제품으로 돋보이는 스키장 메이크업 해볼까요- 오늘 사용할 리엔케이제품이에요....
이기린 뷰티 eun6343.blog.me/220887216016 | 블로그 내 검색

블로그 더보기 ›

Weekend Stroll Makeup

허니와 메이크업
♥ 주말 미실용 ♥



Source: Naver Blog

Me, Myself, and I

Self Skin Diagnosis & Cosmetics Purchase

Warm- tone/ Cool- tone/ Drunk- tone

Limited Edition

던킨에서 도넛 먹으면 '모나미' 한정판 볼펜 '2천원'

정희정 기자 · 03/24/2017 06:56PM

Instagram 'dunkindonuts_kr'

Collaboration Expert- The Face Shop

블로그

더페이스샵 트롤 콜라보 제품 후기 2017.03.31.
오늘은 **콜라보 장인 더페이스샵**의 굉장하고 엄청난 !! 트롤 **콜라보** 제품 몇가지를 들고왔어요 :) 총 다섯종류를 소개해드릴건데 그러다보니 사진이 무려 50장이나 되는...
블랙홀달쑤 blog.naver.com/o2oo_o?Redirect=Log&logNo... | 블로그 내 검색

더페이스샵 마이아더백 콜라보 CC쿠션 리뷰 2016.04.10.
제작해온 **장인**의 손끝에서 탄생했습니다. 마이 아더 백은 루이비통, 샤넬, 끌로에... 요런 마이 아더 백의 디자인과 컨셉이 적용된 **더페이스샵 콜라보** 쿠션입니다 ! 그럼...
Nayongcy skdud_vv.blog.me/220679161992 | 블로그 내 검색

더페이스샵 트롤 디즈니콜라보로 다시 뭉쳤다 2017.02.28.
이제 **콜라보** 끝날 줄 알았는데 역시 **콜라보**하면 **더페이스샵** 밖에 없는 듯 합니당... 그리고 **더페이스샵**의 숨은 **장인**인, 듀얼 제품들! 더페는 은근 듀얼 제품들이 잘...
WonderBo... blog.naver.com/ppo1127?Redirect=Log&l... SmartEditor 3.0

더페이스샵 디즈니 프린세스 콜라보 제품으로 홀리데이... 2016.12.23.
따로 올린다고 해놓고 아직도 안 올렸네요... 그냥 날 쥬겨주세요 ㅇ<-< 점점 **콜라보 장인**으로 거듭나고 있는 **더페이스샵** 디즈니 프린세스 에디션이었습니당.. 구롬 빠잉
메롱 같은 블로그 blog.naver.com/m_J_93?Redirect=Log&logNo... | 블로그 내 검색

더페이스샵 트롤 콜라보 50% 할인 뒤늦은 뒷북 지름. 4일 전
근데 **콜라보 장인 더페이스샵**에서 트롤을 **콜라보** 했댄다. 영화를 안봤으니 별 감흥이 없었다. 그리고 쓸데없이 뭔가 비싸...; **더페이스샵**이 솔직히 **콜라보 장인**이긴...
꽁주몽과 이설의... blog.naver.com/halangbiru?Redirect=Lo... SmartEditor 3.0

블로그 더보기 >

Pull than Push

Something is..

Meaning

Value

Happiness

Common Good

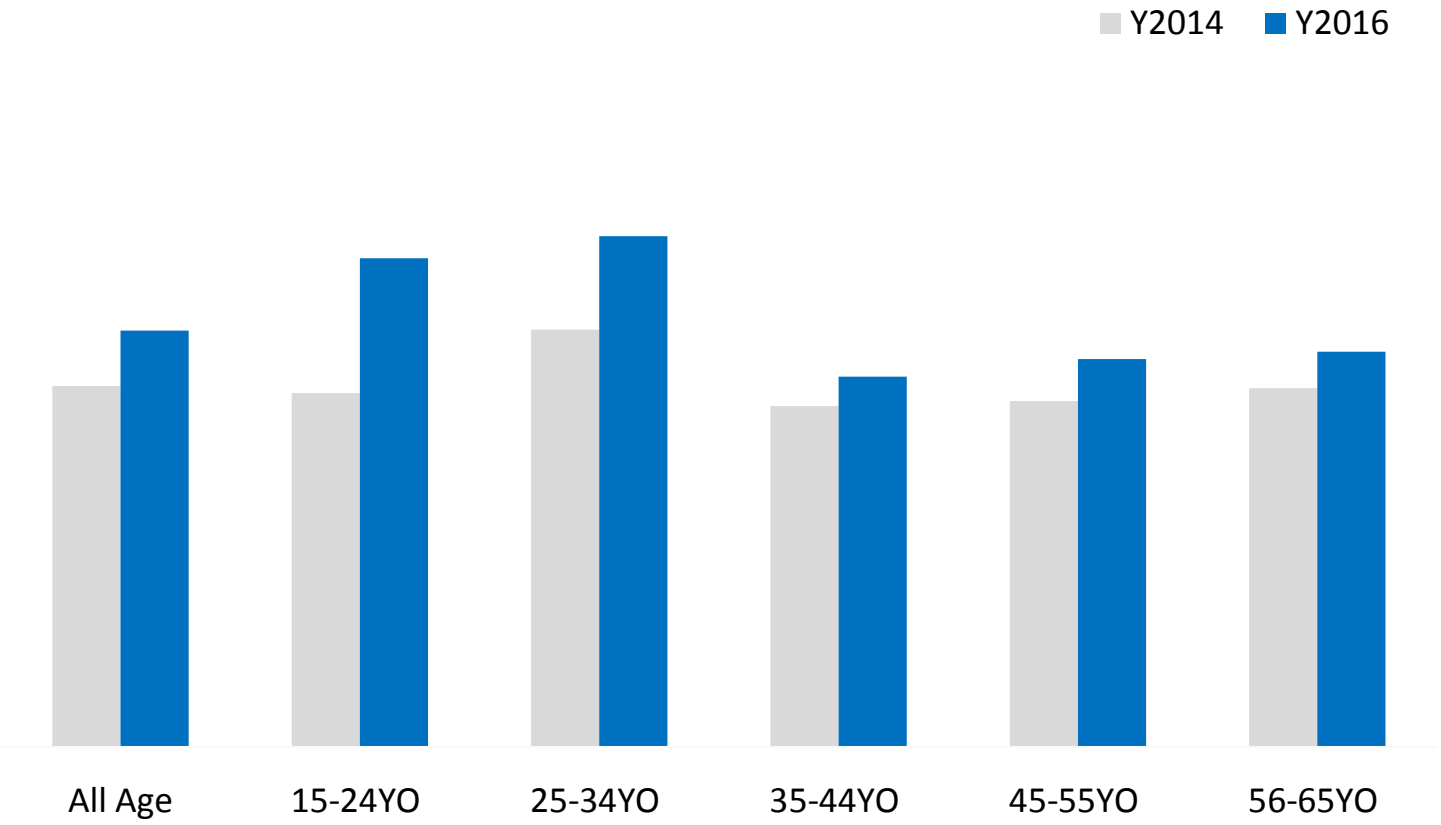
Fun

Enviro-nment

Joy

Lowering Entry Barrier

Number of Brands Purchased per buyer evolution



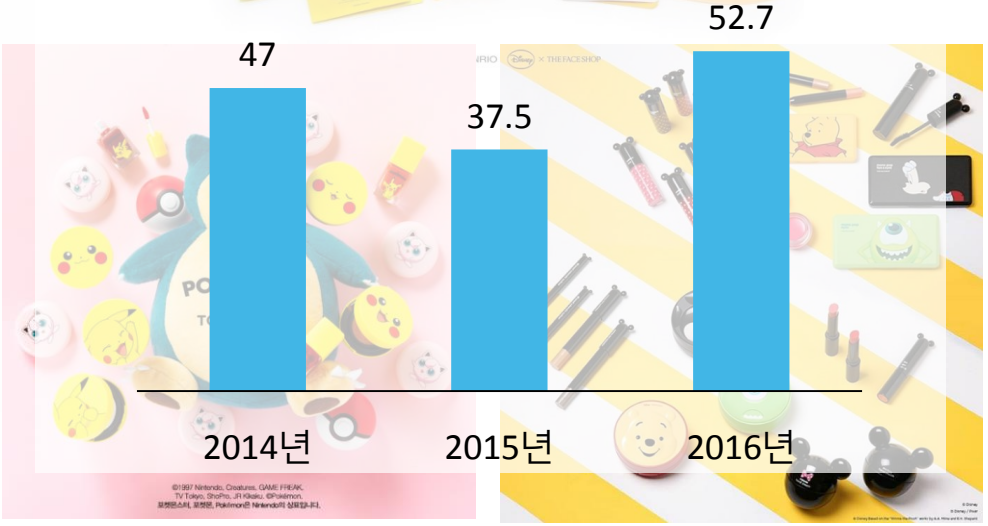
Source: Kantar Worldpanel Beauty Panell Latest 3 years I Buyer I Total Cosmetics

Millennials' Consumption Trend : Affordable Haul & Collaboration

Holika Holika gudetama

Webtoon: "즐거운우리우리네인생"

15-34YO Contribution to The Face Shop Cushion (Value%)

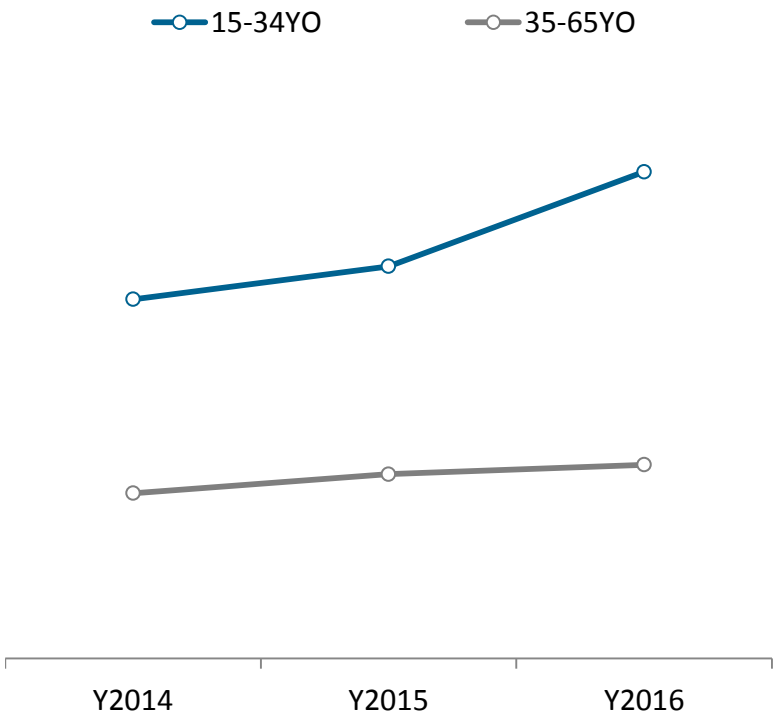


Olive Young leading "Small Fun Expenditure" Trend

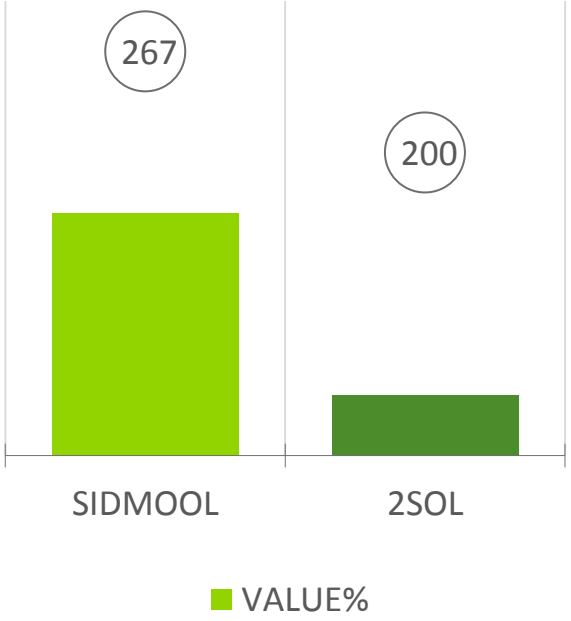
Source: Kantar Worldpanel Beauty Panell Latest 3 years I Value I The Face Shop Cushion

High Involvement In Ingredients And Safety

Age Contribution To Dermocosmetics(%)



Brand Purchased by 15-34YO, Y2016



SIDMOOL ECO PHILOSOPHY

동물실험 반대

동물실험을 해야할 만큼 인간에게 유해하고 위험한 성분을 사용하지 않고, 동물을 상대로 임상 실험을 하지 않습니다.

천연 식물성분

천연 성분을 활용하여 심미적 아름다움은 물론 피부 속 생명력을 되찾을 수 있는 방법을 연구합니다.

천연 보존 시스템

화학방부제의 사용을 최소화하고 대부분의 제품에 식물추출물을 이용해서 안정화 시스템을 적용하고 있습니다.

자연주의 뷰티 브랜드

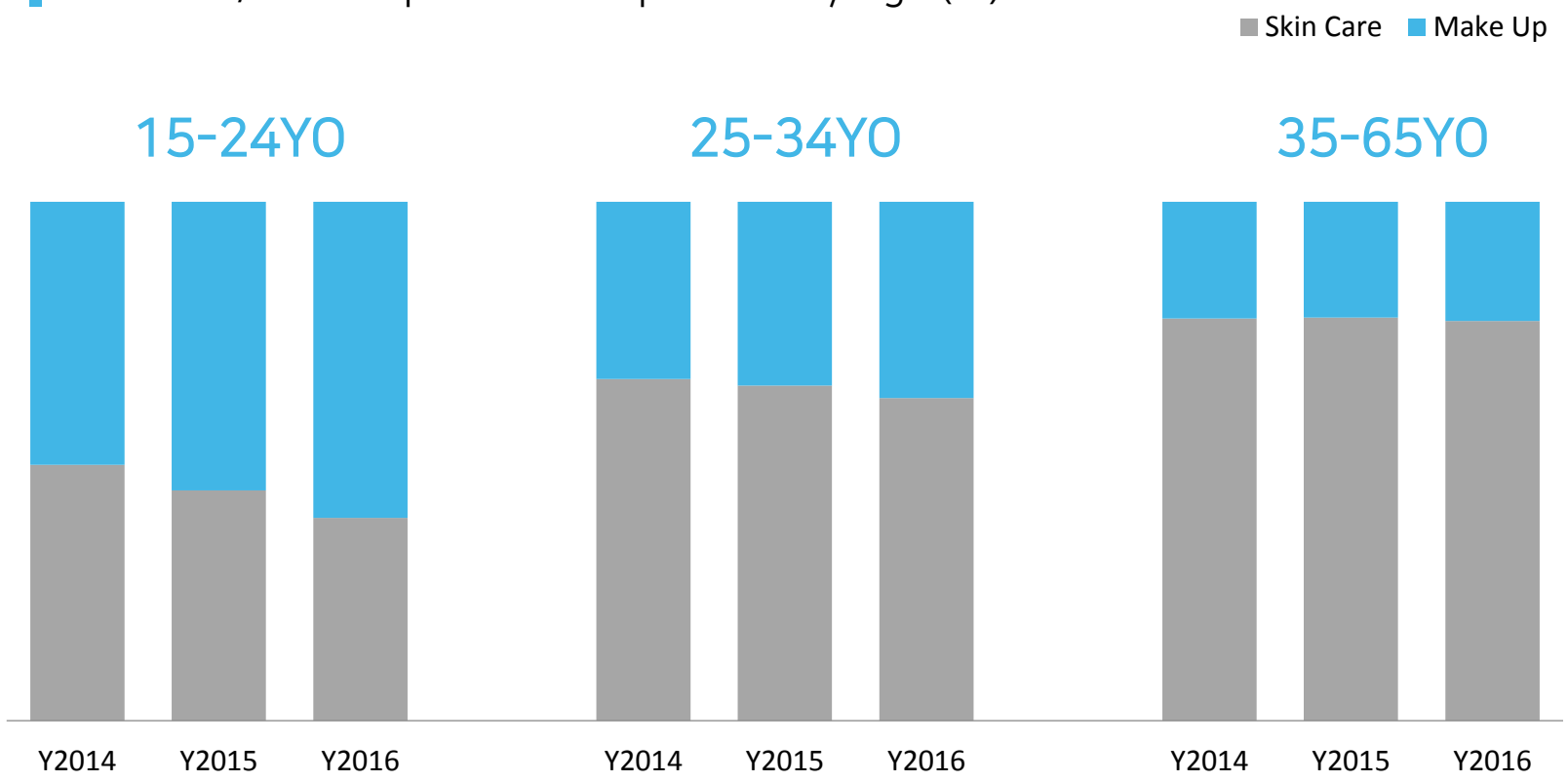
시드물은 환경을 사랑하며, '사람은 자연보호 자연은 사람보호'라는 문구를 제품에 표기하여 시드물을 사용하는 사람들과 함께 자연보호를 실천합니다.

Source: Sidmool Website

Source: Kantar Worldpanel Beauty Panell Latest 3 years I Value I Total Cosmetics

Make Up Beyond Skin Care

Skin Care/ Make Up Value Composition by Age (%)



Source: Kantar Worldpanel Beauty Panell Latest 3 years I Value I Total Cosmetics

Pursuit of Common Good Beyond Personal Value

cruelty-free & vegan logos

CERTIFIED VEGAN vegan.org

crueltyfree andvegan

Vegan®

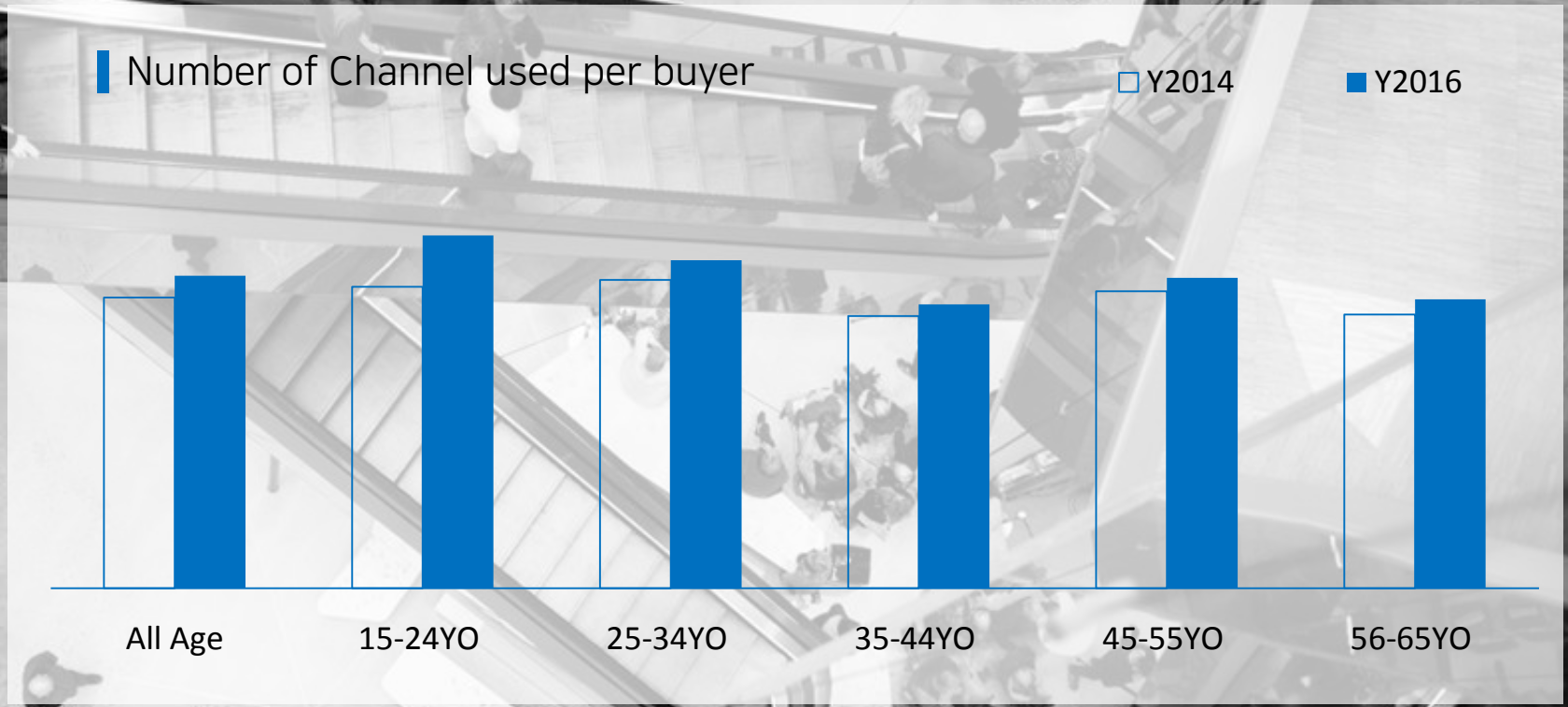
these logos verify that the product and its raw materia
have not been tested on animals and do not contair
any animal ingredients or animal by-products

경제>IT>정보통신

화장품 스타트업 '톤28' 크라우드펀딩 성공비결

파이낸셜뉴스 입력 : 2016.11.08 17:15 | 수정 : 2016.11.08 17:15 2016년 11월 09일자 14면

Procedure than Result



Source: Kantar Worldpanel Beauty Panell Latest 3 years I Value I Total Cosmetics I Excl. Gift& Giveaways

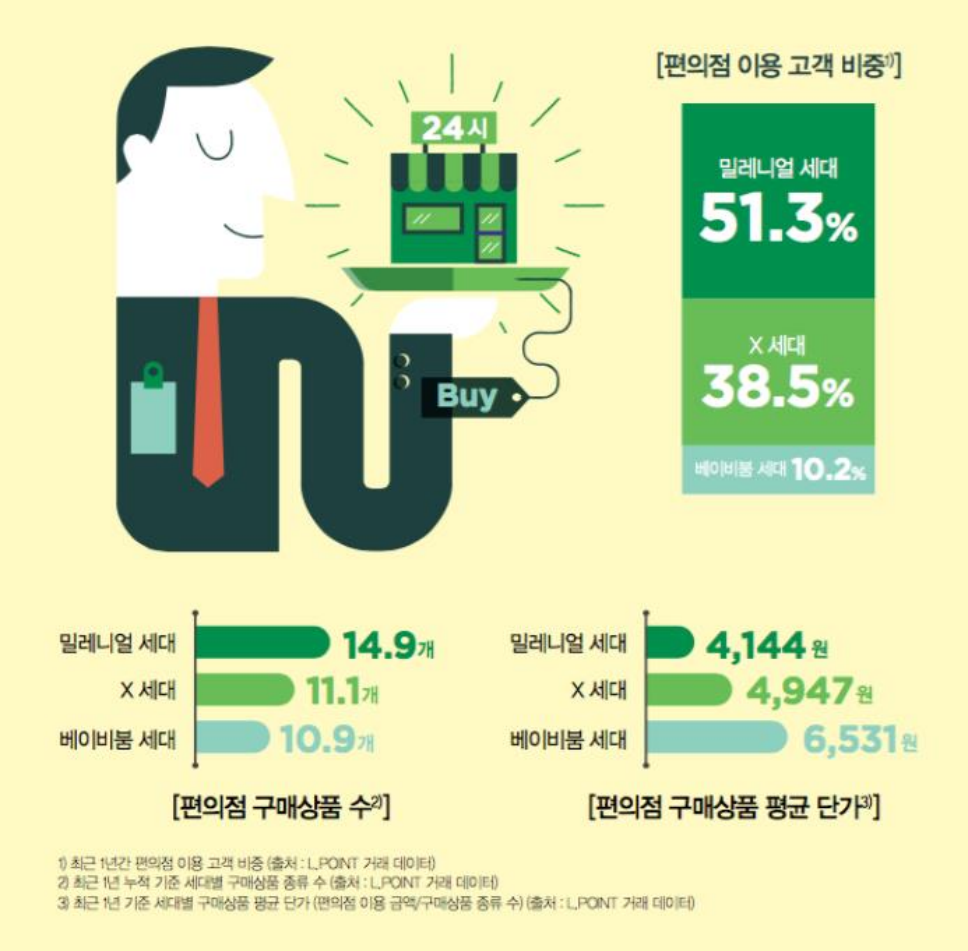
Millennials Usage Of Omni-channel

Traffic	Facial Cleansing	Toner	Cream	Facial Mask	Face Make Up	Lip Make UP	Eye Make Up
Top 3	One Brandshop Internet Hyper	Internet One Brandshop Drugstore	Internet One Brandshop Drugstore	One Brandshop Internet Drugstore	One Brandshop Internet Department St.	One Brandshop Internet Multi B Shop	One Brandshop Multi B Shop Internet
Rising 2	Drugstore Multi B Shop	Drugstore Duty Free Store	Multi B Shop Drugstore	Drugstore Duty Free Store	Drugstore Internet	Drugstore Internet	Multi B Shop Drugstore

KANTAR WORLDPANEL

Source: Kantar Worldpanel Beauty Panel I Latest 2 years I 15-34YO=100% I Excl. Gift&Giveaways

Millennials' Usage Of Convenience Store



편의점 vs 드럭스토어, "몸집 불리는 드럭스토어 … 견제에 나선 편의점"

이지윤 기자 | 2017-03-11 10:30:02 | 생활

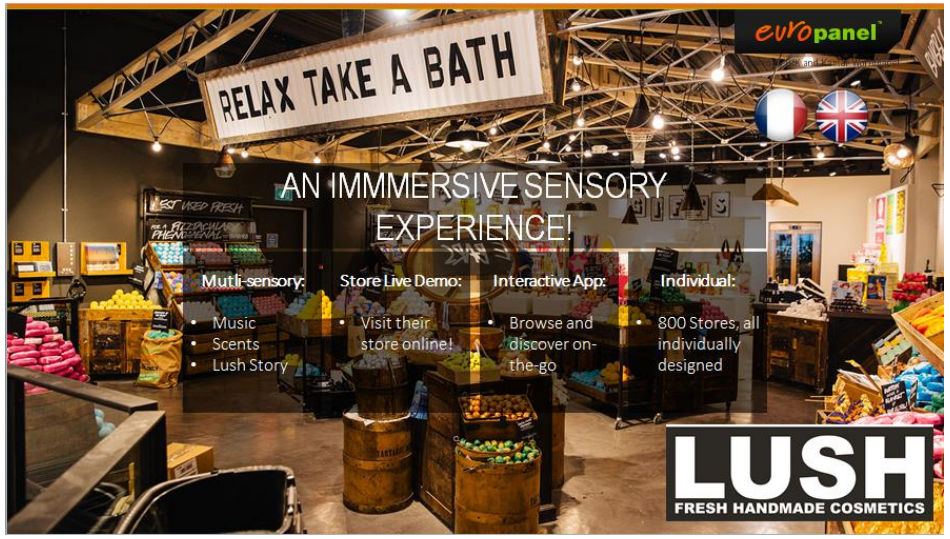
가 가

BGF리테일(027410)이 운영하는 CU도 20대를 겨냥해 인기 브랜드와 인터넷 화제 상품 총 11개 브랜드 42개 상품을 론칭할 것으로 알려졌다. 특히 드럭스토어에서 입소문을 타며 성장한 메디힐, 히말라야, 시세이도 등 브랜드를 선보인다. 200개 대학가 매장에서 우선 판매한다.

GS리테일이 운영하는 GS25는 다음 달부터 LG생활건강 화장품 브랜드 '비욘드'를 독점 론칭한다. 편의점 특성에 맞춰 용량을 줄인 소용량 키트로 제작하고 GS25 각 점포에 비욘드 전용 진열대를 비치해 판매에 나선다. GS25는 올해 말까지 비욘드 판매점포를 7000개까지 확대해 나간다는 계획이다. /이지윤기자 lucy@sedaily.com

Seven Eleven Make Up Private Brand '0720'

Same Brand, Different Store, Diverse Experience



A.H.C Ewha. W. Univ. Str.
- "RED, A.H.C"

Gentle Monster Hongdae Str.
- "Space dedicated to Scent Research"

'젠틀 몬스터' 홍대점 1층 / 사진=뉴스1 ⓒ강고은 에디터

Wrapping up the Seminar…

Sharing Than Purchasing

Online Influence Will Continue To Expand

Me Before Us

Consumer Needs Will Continue To Diversify

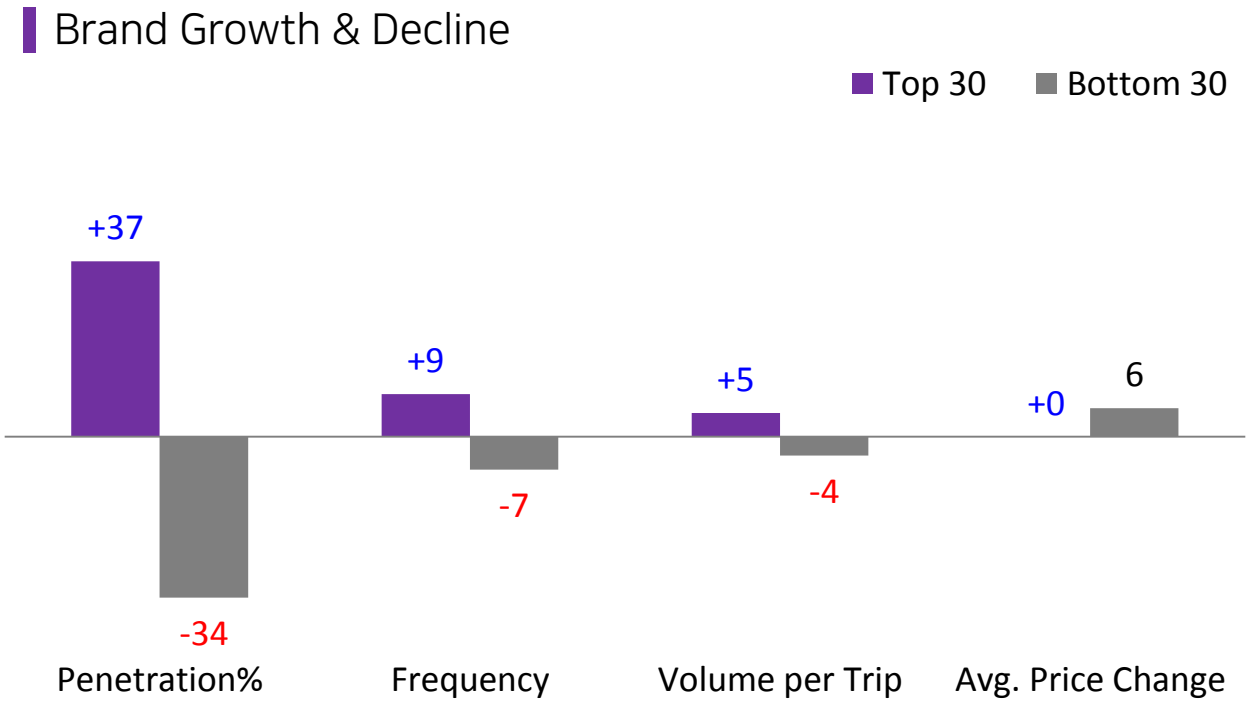
Pull than Push

Brand Value and Proposition will continue to be delivered

Procedure than Result

Diversification Strategy by Channel

Consumer is the Key to Brand Success!



Source: Europanel
Period: Y2011~Y2015
Response: 14,500 Brands, 80 Categories in 13 countries

Source: Europanel

Contact

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