

CHINESE SHOPPERS: EVOLVING BEHAVIORS IN A CHALLENGING ENVIRONMENT

China Shopper Report 2014, Vol. 1

BAIN & COMPANY

KANTAR WORLDPANEL a CTR service in China

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Executive summary

The growth of the fast-moving consumer goods (FMCG) market continued to slow in China in 2013. Fierce competition among brands and thriftier shoppers mean that marketers can no longer grow a brand just by riding a category wave. Gaining market share is imperative, and market penetration is the primary way to achieve it, as we established in our 2012 and 2013 China Shopper Reports.

For the third year, Bain & Company partnered with Kantar Worldpanel to study the shopping behaviors of 40,000 Chinese households. Our unconventional approach assigned research participants with barcode scanners to determine what they actually purchased, as opposed to what they said they had purchased.

We studied 106 FMCG categories and analyzed in detail 26 categories spanning the four largest consumer goods sectors: personal care, home care, beverage and packaged food, which account for more than 80% of China's FMCG market in value. Our study helped us gain invaluable insights into how shoppers make purchases in these 26 important consumer goods categories.

Building on the research we began in 2012, we continue our exploration of the major trends affecting China's FMCG market in this year's China Shopper Report. This is the first of two volumes and focuses on three key trends:

- Continuing deceleration of China's FMCG market across sectors and all city tiers
- Fewer store visits to offline retailers as online commerce boomed
- Foreign brands' continued loss of aggregate share to Chinese brands for the 26 categories we analyzed

China's decelerating FMCG market

Growth continued to slow across all the FMCG sectors we studied—packaged food, beverage, personal care and home care—and across all city tiers, though lower-tier cities grew at higher rates. In higher-tier cities, which are still the primary markets for FMCG, growth declined from 2012 to 2013 compared with growth from 2011 to 2012. In Tier 1, it dropped from 8.6% to 3.5%; in Tier 2, from 10.7% to 7.4%; and in Tier 3, from 12.4% to 8.4%.

FMCG growth, which was 15% nearly three years ago and around 12% in 2012, slowed to 4.6% in the first quarter of 2014. That trend suggests mid-single-digit growth ahead—though China's annualized FMCG growth still remains higher than growth in many other Asian markets.

One reason for the deceleration: The pace of premiumization slowed noticeably. In the past, the FMCG market grew as a result of price increases, new product innovations and the introduction of more premium SKUs at higher price points. With premiumization slowing, price increases fell sharply across all four sectors.

The good news is that volume growth across sectors remained stable with the exception of packaged food. In the beverage sector, volume growth increased from 2.7% to 3.9%. For both personal care and home care, the 6% growth in 2013 was similar to that in 2012. And in packaged food, growth decreased from 5.5% to 2.6%, because an unusually long, hot summer affected sales.

Though the growth of disposable income and annual spending per household decreased, according to China's National Bureau of Statistics, the number of urban households steadily increased at 2.6% per year, contributing to volume growth.

Challenging offline and booming online

Offline shopping channels represented 97% of all FMCG purchases, as purchasing behaviors continued to shift toward modern trade, which mainly includes supermarkets and hypermarkets.

Modern trade accounted for more than 50% of FMCG market value. Growing at a brisk 10% per year, it has surpassed traditional trade in scale and growth, gradually taking more share in purchase occasions and spending—a trend consistent across all city tiers.

Hypermarkets saw store visits per household decline in the past two years, from 26 visits per year per household in 2011 to 25 visits in 2012 and 2013. Smaller modern trade formats—supermarkets, convenience stores and personal care stores—saw no decrease in visits at 23 per year per household. Declining hypermarket visits, however, were offset by larger package size and with increased car ownership in major Chinese cities making it convenient for shoppers to purchase and transport larger items.

Another reason hypermarket visits declined: The growth of prepaid cards for retail use slowed. Prepaid cards, which are given to Chinese consumers as public welfare or as gift cards, are used mainly in hypermarkets, supermarkets and department stores. The slowdown in their use was the result of the Chinese government's anti-corruption efforts targeting card misuse.

The online FMCG channel, though nascent, is booming, as Chinese shoppers are more willing than shoppers in other markets to use their smartphones and PCs to make purchases. As a result, China is now the No. 1 digital retail market in the world in both value and penetration, with momentum expected to continue. All 106 categories we studied enjoyed high online growth—42% overall. Young urban households in higher-tier cities with incomes of more than RMB 7,000 per month make up the largest percentage of e-commerce shoppers. Consistent with previous years, baby products and beauty products are highly penetrated categories with high online value share.

Chinese vs. foreign brands: Winners and losers

Fierce competition from Chinese companies in 2013 resulted in foreign brands losing overall share across the 26 categories we studied in detail. But the picture is different by category: While foreign brands lost share in many categories, including carbonated soft drinks, skin care, juice and infant formula, they achieved marginal share gain in some categories, such as hair conditioner and biscuits.

Nonetheless, on balance, 60% of the foreign brands we studied lost share this year; many even lost share in the categories in which foreign brands experienced overall share gains. The share loss occurred across all city tiers—even higher-tier cities, where foreign brands enjoyed a relatively strong presence.

As one could expect, this change in market share is driven by change in penetration.

Implications: The market share imperative

As Chinese shopper behaviors continue to shift and evolve, marketers can no longer coast by simply riding a category wave. Growth must come primarily from share gain. And penetration change is the most important way to achieve share change.

Our first volume of the 2014 China Shopper Report by Bain & Company and Kantar Worldpanel, along with the 2012 and 2013 reports, shows that marketers must drive penetration to gain market share. In an upcoming volume, to be released in the fall of 2014, we will share more details about how marketers can do this.

Building penetration depends on continually building brand consideration—the percentage of consumers who consider your brand for a purchase occasion—which in turn helps increase penetration. The steady path for earning consideration and penetration requires investment in three brand assets:

- **Memory structures.** By using the full range of above-the-line (ATL) and below-the-line (BTL) marketing touchpoints, marketers can anchor a brand in consumers' long-term memories. Winning companies broadcast distinct, memorable messages to the largest possible swath of consumers.

- **Product portfolios.** Too many brands and SKUs can result in ineffective advertising, shopper confusion and other perception woes that erode penetration. Surprisingly few innovations result in increased penetration. They fail at a high rate and distract marketing and commercial teams from supporting core SKUs. Winning brands identify critical "hero" SKUs that have the highest potential to win with shoppers.

- **In-store assets.** Once you target the most important SKUs, it's essential to adequately invest to activate them at the point of sale and ensure they're always available at the right place on the shelf. Leading companies identify which store assets are critical to own in their category.

Given that China is now the world's No. 1 digital retail market, marketers—especially those in the leading online categories—will benefit from developing an e-commerce business model. The online channel can be used as an incremental channel to further build these three brand assets and expand business, while minimizing cannibalization with offline channels.

Though e-commerce is booming, offline channels are still the main battlefield. It's critical for marketers to maximize offline business potential by leveraging online traffic through effective digital marketing and integrated solutions—what's known as "O2O" (online to offline).

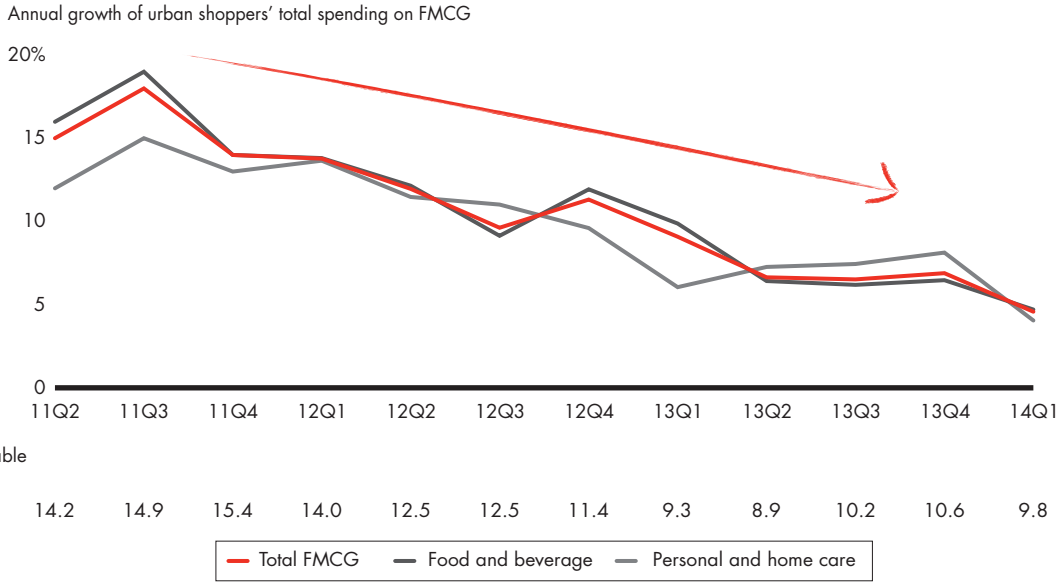

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2a.

China's decelerating FMCG market

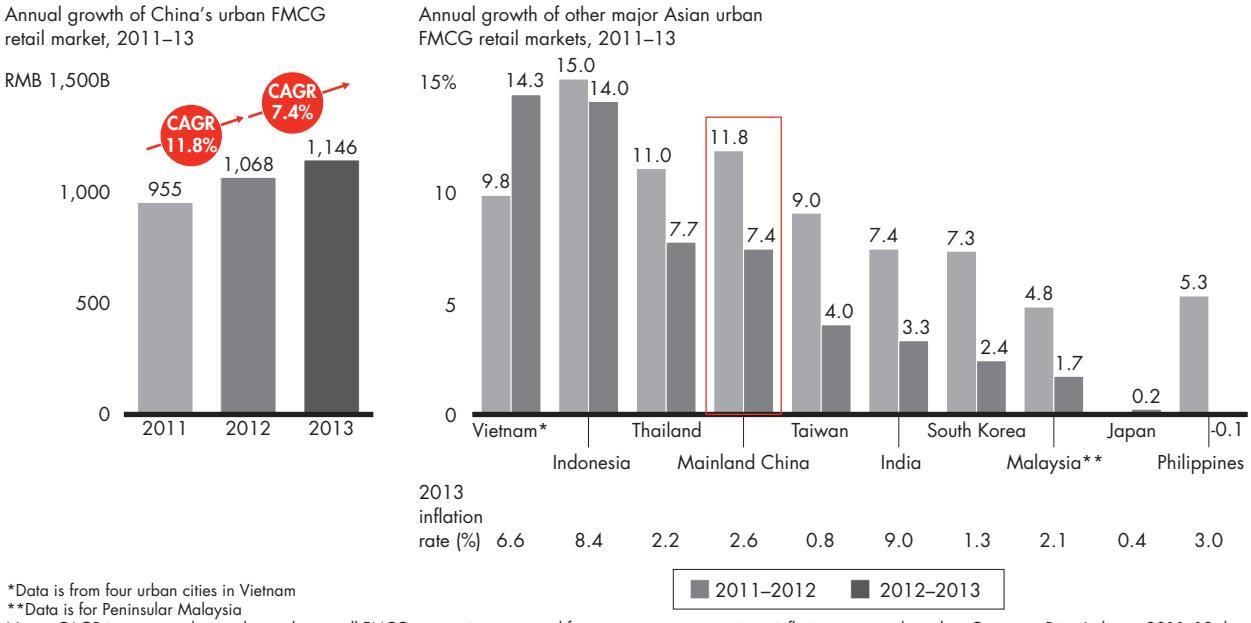
- FMCG growth continued to slow across all sectors we studied (packaged food, beverage, personal care and home care).
- In the first quarter of 2014, FMCG growth slowed to 4.6%, the lowest in three years and a big drop from the 15% growth it saw in the second quarter of 2011.
- One reason for decelerating growth: The pace of premiumization slowed, and as a result, price increases in 2012 to 2013 were smaller than the increases in 2011 to 2012 across all four sectors. Price increases for packaged food dropped from 5.5% to 2.5%; for beverage, from 9.9% to 6.8%; for personal care, from 4.1% to 1.6%; and for home care, from 4.7% to 0.2%. Worse, some sectors, in particular, personal care and home care, had average selling price increases that fell below the 2.6% inflation rate.
- Volume growth was more stable, with the exception of the packaged food sector, where sales were affected by an unusually long, hot summer in 2013. Volume growth in packaged food declined from 5.5% to 2.6%, while volume growth in the beverage sector increased from 2.7% to 3.9%.
- The overall slowdown in the FMCG category over the last two years is mostly a result of a decrease in annual spending per household—a drop from 9% in 2012 to 4.6% in 2013—while the number of households continued to increase at approximately 2.6% per year.
- FMCG growth consistently slowed across all city tiers, though in lower-tier cities it grew at higher rates. Higher-tier cities, still the primary markets for FMCG, saw declining growth—in Tier 1 decreasing from 8.6% to 3.5%; in Tier 2, from 10.7% to 7.4%; and in Tier 3, from 12.4% to 8.4%.
- China's FMCG growth slowed from 11.8% in 2012 to 7.4% in 2013; however, it is still higher than FMCG growth in many other Asian markets.

Figure 1: Influenced by the macro economy, China's FMCG market growth has slowed, trending toward mid-single-digit growth



Notes: This study tracked household take-home consumption and covered 20 provinces and four direct-controlled municipalities in mainland China (excludes Hong Kong, Macau and Taiwan); the number of households in Tier-5 cities was adjusted in 2013 and restated for 2011–12, resulting in slightly different 2011–12 data from previous reports; data covers 106 FMCG categories (includes ambient and chilled food and beverages, and personal care and household products; excludes fresh food, white goods and electronics)
Sources: Kantar Worldpanel; Bain analysis

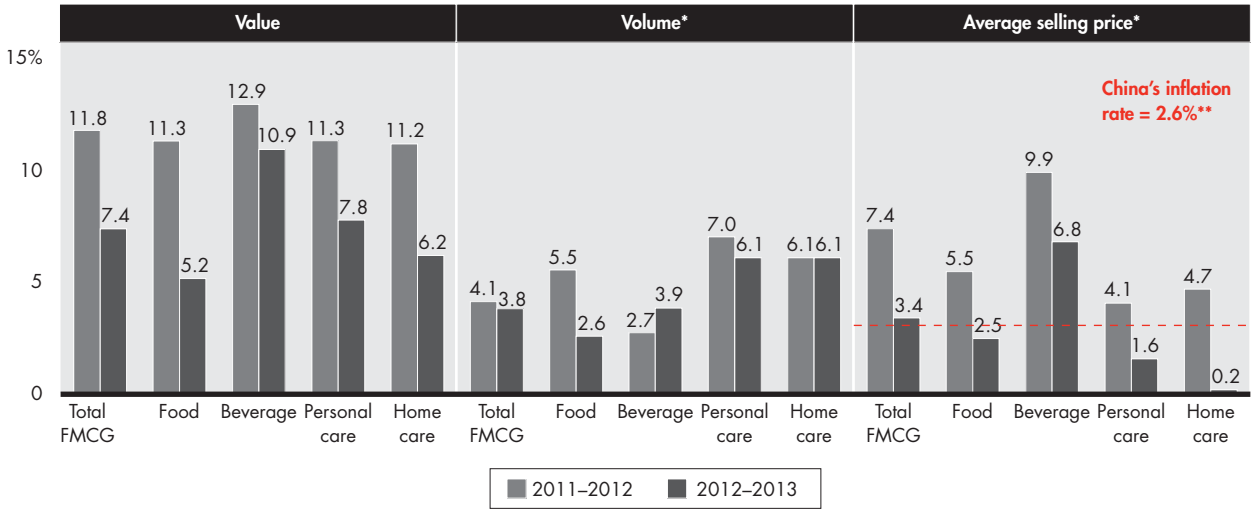
Figure 2: The upside: Despite the slowdown, China's FMCG market growth is still higher than that in many other Asian markets



*Data is from four urban cities in Vietnam
**Data is for Peninsular Malaysia
Notes: CAGR is compound annual growth rate; all FMCG categories were used for cross-country comparison; inflation rates are based on Consumer Price Indexes; 2011–12 data for Japan is not included
Sources: Kantar Worldpanel; Bain analysis

Figure 3: Falling prices caused the market growth slowdown, but volume growth remained steady, except in the food sector

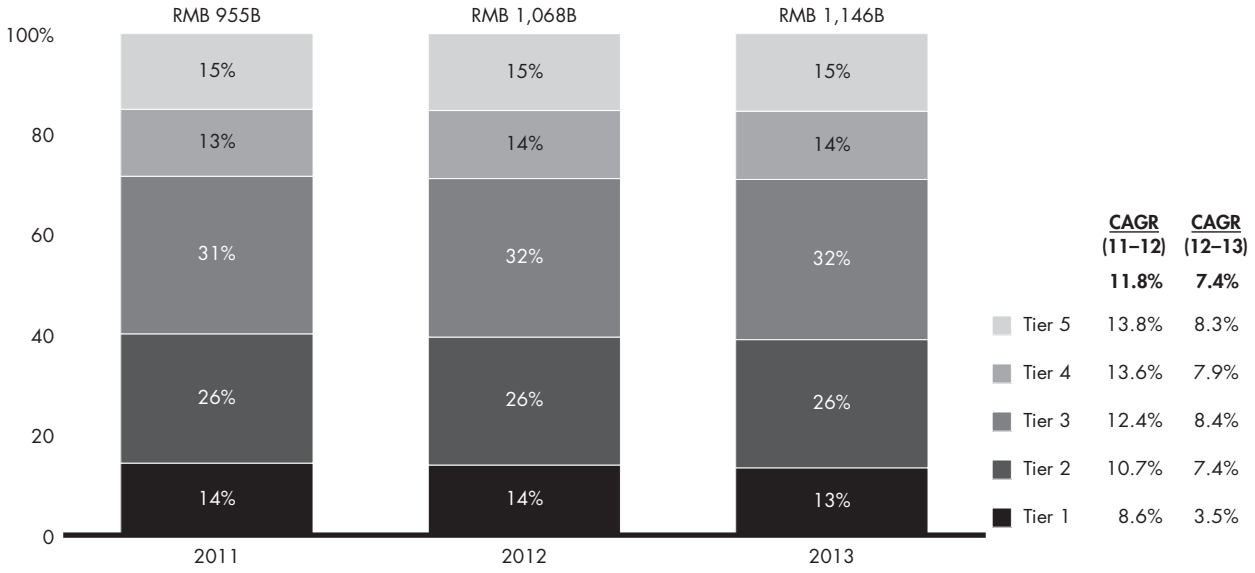
Annual growth of urban FMCG market, 2011–13



*The units for volume are 1 kilogram for packaged foods, 1 liter for beverages, 10 rolls or 1,000 sheets for toilet tissue, 1,000 sheets for facial tissue, 100 pieces for baby diapers, 1 package for skin care products or color cosmetics and 1 piece for toothbrushes; the average selling price is also based on these units
**China's inflation rate was 2.6% for both 2012 and 2013
Notes: Data covers 106 FMCG categories (includes ambient and chilled food and beverages, and personal care and household products; excludes fresh food, white goods and electronics)
Sources: Kantar Worldpanel; Bain analysis

Figure 4: FMCG growth consistently slowed across city tiers, though lower-tier cities achieved higher growth rates

Channel value share in urban FMCG retail market



Notes: Data covers 106 FMCG categories (includes ambient and chilled food and beverages, and personal care and household products; excludes fresh food, white goods and electronics)
Sources: Kantar Worldpanel; Bain analysis

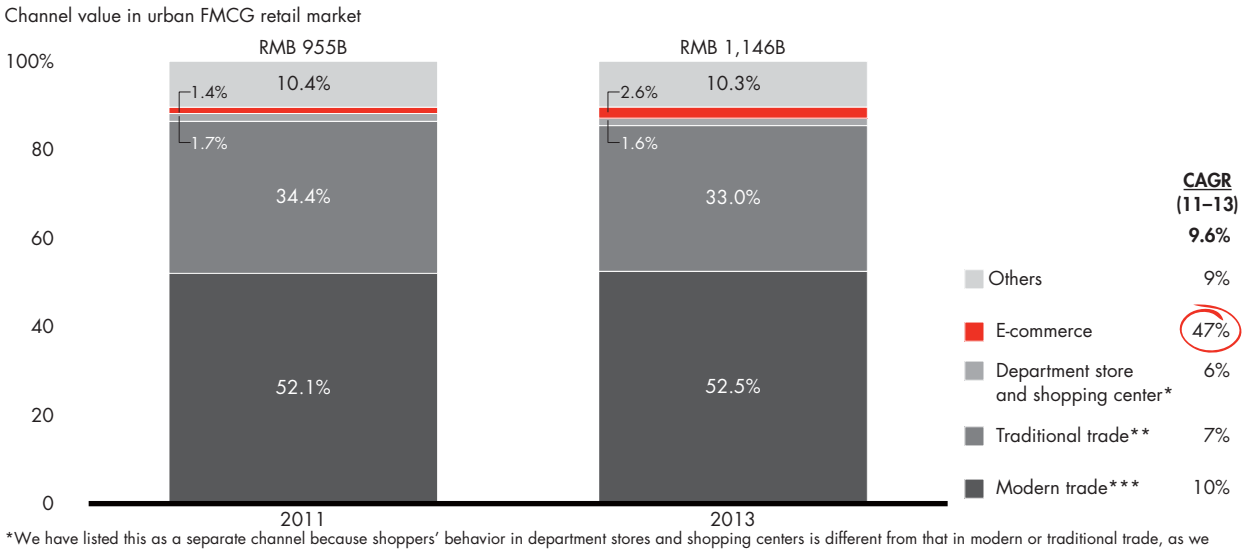


2b.

Challenging offline and booming online

- Offline shopping channels represented 97% of FMCG purchases in 2013, with a continued shift toward modern trade.
- Modern trade, which has surpassed traditional trade, is growing at 10% per year and accounted for about half of FMCG market value. It is gradually replacing traditional trade, a trend consistent across all city tiers.
- But modern trade saw a decline in store visits in 2013, especially in hypermarkets, where visits per year per household decreased to 25 in 2012/2013 from 26 in 2011. This drop was partially driven by the declining growth of prepaid cards for retail use as Chinese authorities targeted card misuse. Smaller modern trade formats—supermarkets, convenience, personal care—saw no decrease at 23 visits.
- Declining visits were offset by larger package size; increased car ownership in major Chinese cities allows shoppers to transport larger items. Though price increases have been smaller since 2011, the average selling price per kilogram rose about 3% in 2013 in hypermarkets.
- The online FMCG channel, though nascent, is booming. Chinese shoppers are more willing than shoppers in other markets to purchase items with smartphones and PCs (see the Bain Brief "China's e-commerce prize"). As a result, China is now the world's No. 1 digital retail market.
- Young urban households in higher-tier cities with higher incomes represent the largest group of e-commerce shoppers: Households with incomes of more than RMB 7,000 per month, young urban households and households in Tier 1 to Tier 3 cities contribute 53%, 58% and 52% of online purchases, respectively.
- All 106 categories enjoyed high online growth—42% overall. Consistent with previous years, baby products and beauty products enjoy high penetration with high online value share: baby diapers at 28%, infant formula at 21%, skin care at 9% and color cosmetics at 10%.
- In most categories, the top online and offline brands share similarities; however, the brands with higher online market share have a winning digital strategy. In some categories, online-focused brands have a stronger market position than offline-focused brands. Consider infant formula: Online-focused brands Karicare, Nutrilon and Friso have a much higher market share online vs. offline.

Figure 5: Offline channels continued to pivot toward modern trade, while online channels, though nascent, boomed

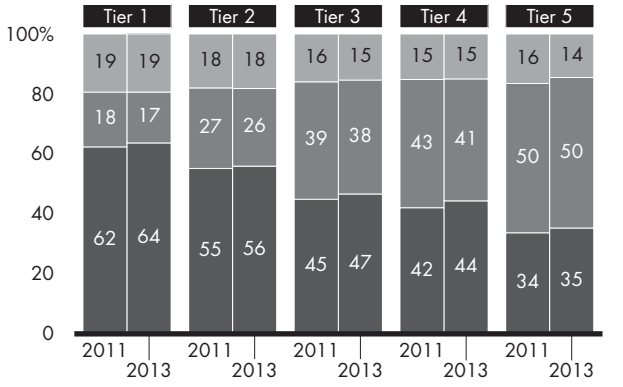


*We have listed this as a separate channel because shoppers' behavior in department stores and shopping centers is different from that in modern or traditional trade, as we define them
**Traditional trade includes groceries, independent mini-marts, specialty stores, wholesale stores, direct sales and welfare from labor unions
***Modern trade includes hypermarkets, supermarkets, convenience stores, personal care stores and mini-mart chains
Notes: Data covers 106 FMCG categories (includes ambient and chilled food and beverages, and personal care and household products; excludes fresh food, white goods and electronics); "others" includes free marts, beauty salons, drugstores, milk stores, overseas purchases and TV shopping
Sources: Kantar Worldpanel; Bain analysis

Figure 6: Offline trend: Modern trade is replacing traditional trade, taking a greater share in purchase occasions and spending across all city tiers

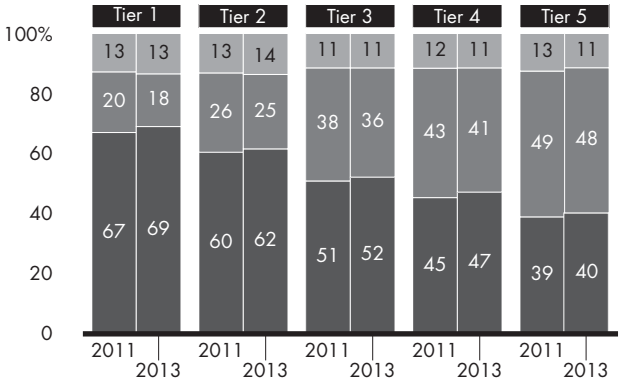
Purchase occasions

Channel share of purchase occasions per year per household (2011 vs. 2013)



Annual spending

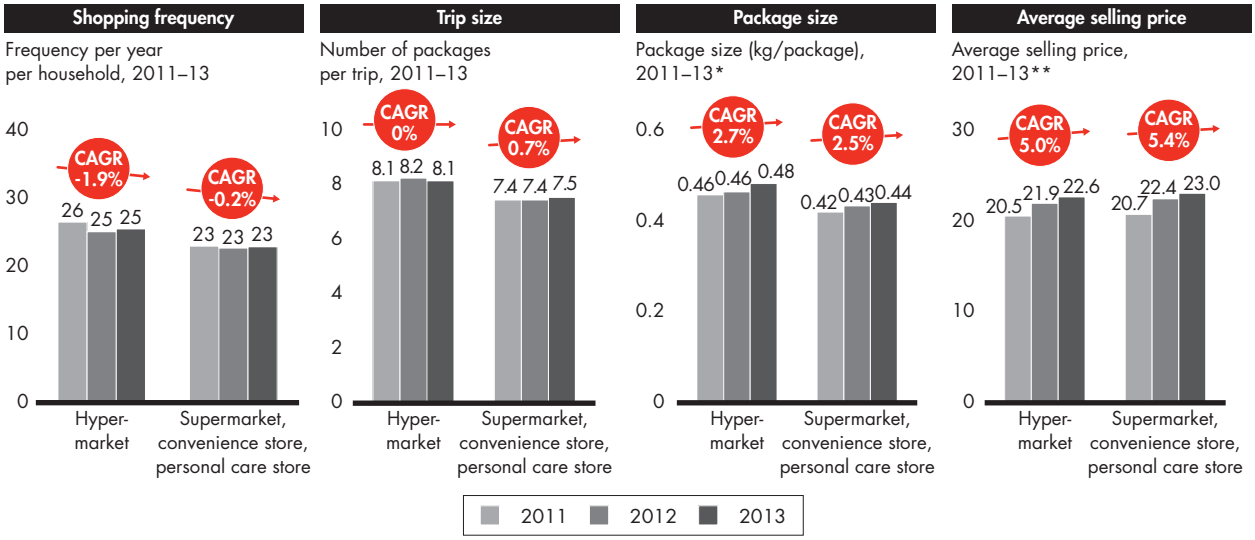
Channel share of spending per year per household (2011 vs. 2013)



Modern trade* Traditional trade** Others***

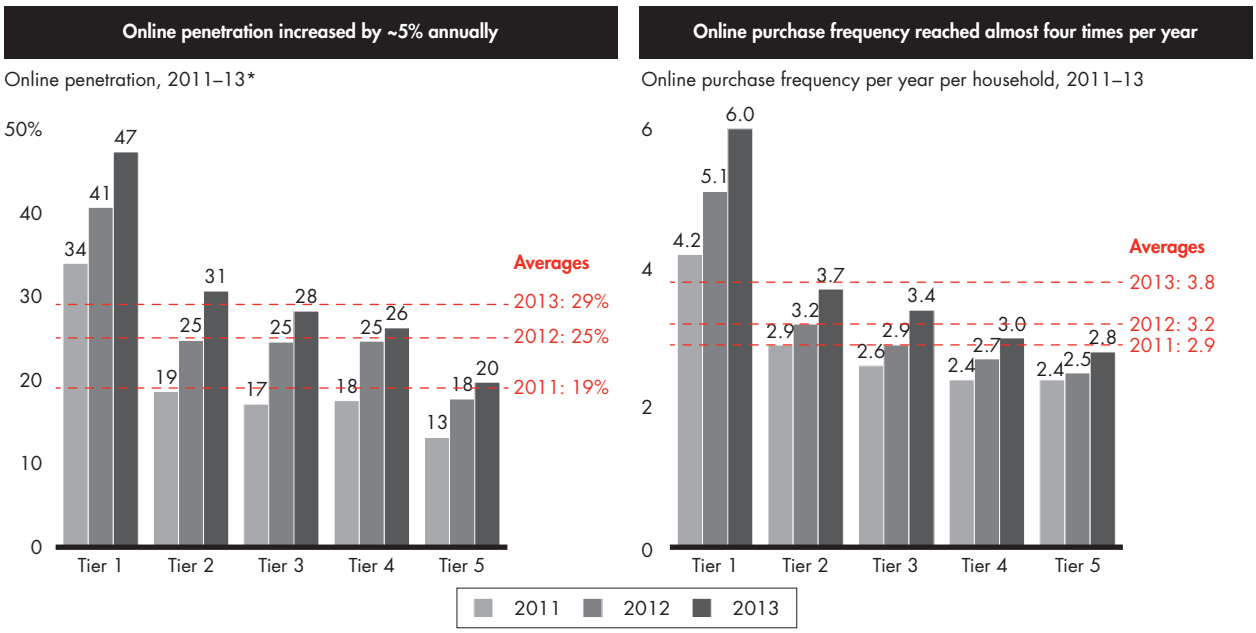
*Modern trade includes hypermarkets, supermarkets, convenience stores, personal care stores and mini-mart chains
**Traditional trade includes groceries, independent mini-marts, specialty stores, wholesale stores, direct sales and welfare from labor unions
***"Others" includes department stores, shopping centers, free marts, beauty salons, drugstores, milk stores, overseas purchases and TV shopping
Notes: Data covers 106 FMCG categories (includes ambient and chilled food and beverages, and personal care and household products; excludes fresh food, white goods and electronics)
Sources: Kantar Worldpanel; Bain analysis

Figure 7: Declining hypermarket traffic is offset by larger package sizes and a higher average selling price per kilogram



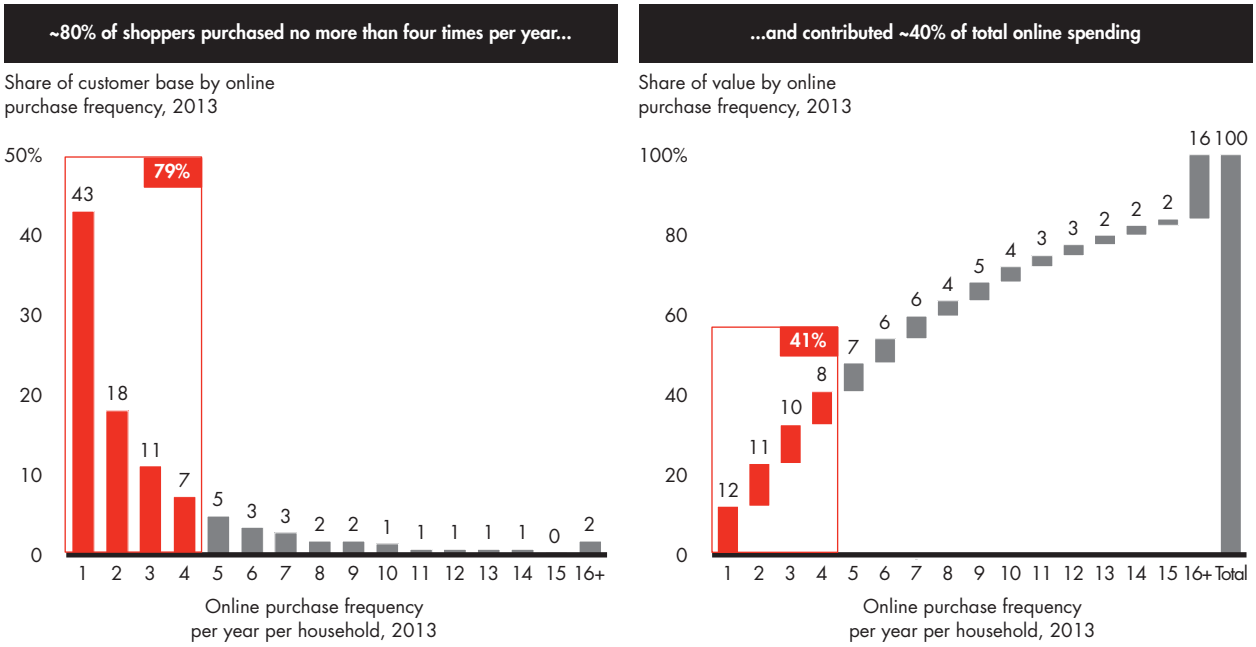
*Package size is 1 kilogram of infant formula/package, 100 baby diapers/package, 10 rolls or 1,000 sheets of toilet tissue/package
**Average selling price is RMB/kilogram for packaged foods, RMB/liter for beverages, RMB/10 rolls or 1,000 sheets for toilet tissue, RMB/1,000 sheets for facial tissue, RMB/100 pieces for baby diapers, RMB/package for skin care products or color cosmetics, RMB/piece for toothbrushes
Notes: Data covers 106 FMCG categories (includes ambient and chilled food and beverages, and personal care and household products; excludes fresh food, white goods and electronics)
Sources: Kantar Worldpanel; Bain analysis

Figure 8: Though e-commerce is still developing, penetration and frequency grew fast, especially in higher-tier cities



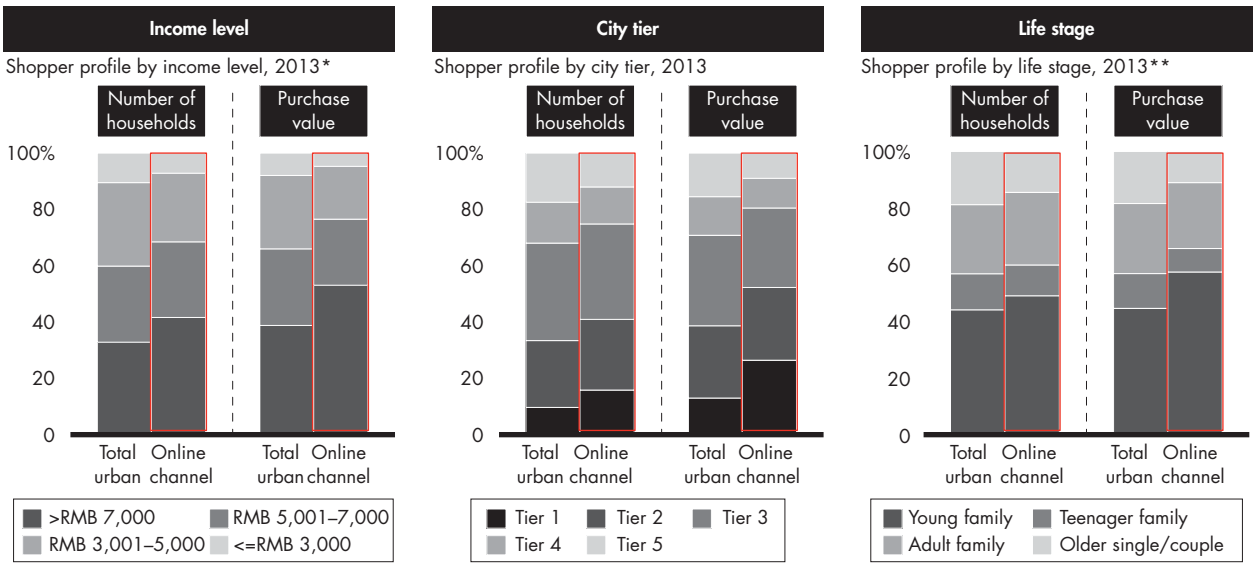
*Online penetration is the number of households that purchased a certain brand from the online channel at least once per year, divided by the total number of households
Sources: Kantar Worldpanel; Bain analysis

Figure 9: Low-frequency shoppers represent a substantial portion of the online shopper base and of online spending



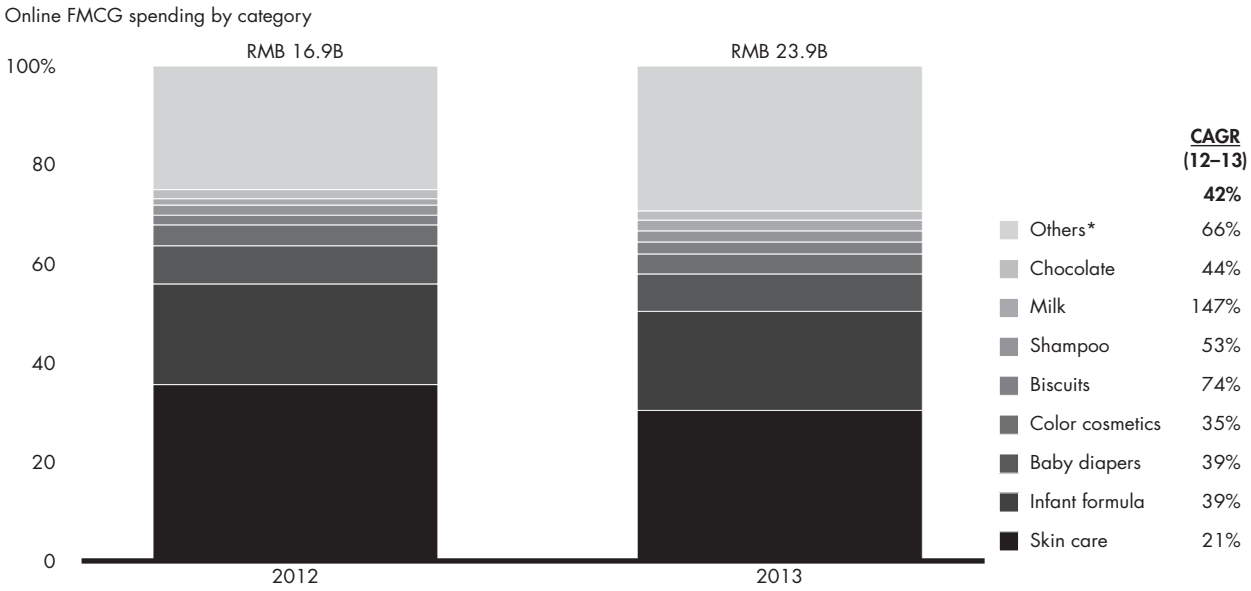
Sources: Kantar Worldpanel; Bain analysis

Figure 10: Younger households with higher incomes in higher-tier cities contribute to a greater share of e-commerce



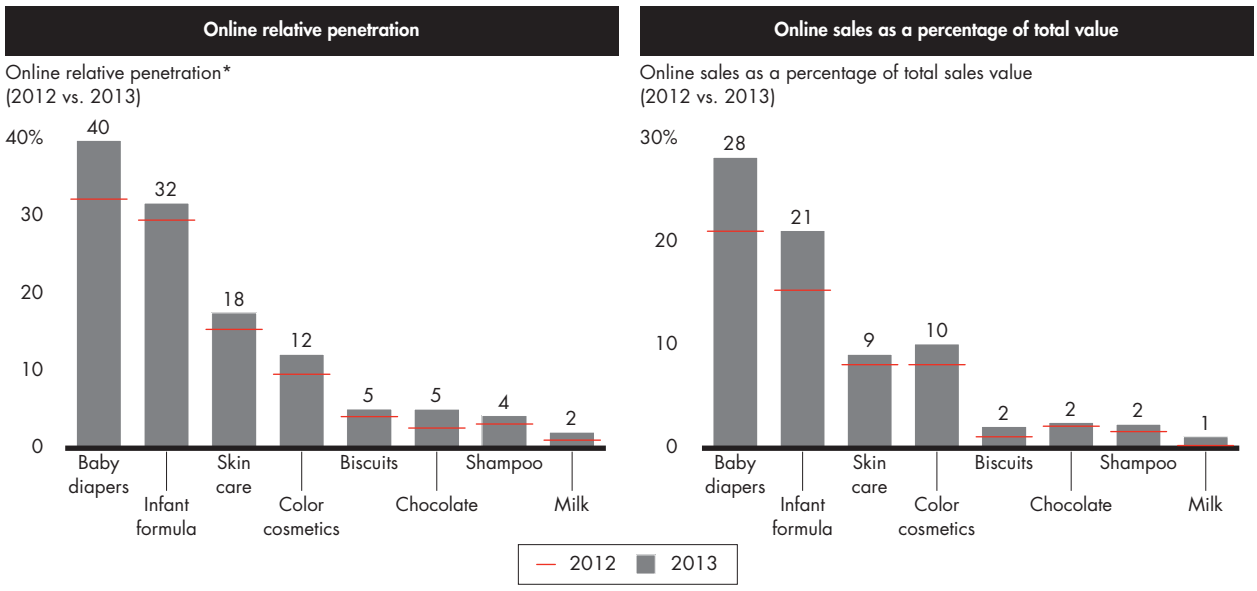
*Monthly household income used
**Represents families with children younger than 14, families with teenagers ages 14–17, families with adults ages 18–45 and older singles/couples over 45
Notes: Data covers 106 FMCG categories (includes ambient and chilled food and beverages, and personal care and household products; excludes fresh food, white goods and electronics)
Sources: Kantar Worldpanel; Bain analysis

Figure 11: Among the top eight categories, beauty and baby products continued to dominate, but other categories grew faster



*"Others" includes FMCG categories with less than RMB 400 million in online sales value in 2013
Notes: Data covers 106 FMCG categories (includes ambient and chilled food and beverages, and personal care and household products; excludes fresh food, white goods and electronics); data for infant formula and baby diapers are based on Kantar Worldpanel Baby
Sources: Kantar Worldpanel; Bain analysis

Figure 12: Beauty and baby categories have achieved high penetration and high online sales value



*Online relative penetration is a category's online penetration divided by the category penetration; a category's online penetration is the number of households that purchased a certain brand from the online channel at least once per year, divided by the total number of households
Note: Data for infant formula and baby diapers are based on Kantar Worldpanel Baby
Sources: Kantar Worldpanel; Bain analysis


省心价
省心价
省心价
省心价
省心价
热销商品
舒适达

2c.

Chinese vs. foreign brands: Winners and losers

- Foreign brands, experiencing fierce competition from Chinese brands, lost share across the 26 categories we studied as Chinese companies continued to increase penetration in 2013. The picture differs by category.

- In many categories, foreign brands lost share. In carbonated soft drinks, they experienced 6.3% share loss, while domestic brand Wahaha Kvass increased share by 3.8% through new product innovation and large-scale ATL and BTL marketing, according to Kantar. In skin care, foreign brands lost 5.5% share as domestic brands gained: Pechoin increased share 0.8% through integrated product and brand upgrades and celebrity endorsements; Proya added 0.7% share by increasing penetration in emerging channels, such as personal care stores, and through celebrity endorsements. Foreign brands also lost 2.7% share in juice, while national brand Huiyuan gained 1.1% by promoting its "100% fruit juice" concept and launching new flavors, including sugar-coated haw drinks. Tian Di No. 1, another domestic juice brand, gained 0.6% share with its healthy concept fruit vinegar. Foreign brands lost 2.2% share in infant formula; sales were hurt by word-of-mouth unsubstantiated claims of contaminated ingredients.

- Foreign brands, however, achieved marginal share gain in some categories. Foreign hair conditioner brands gained 2.6%: Schwarzkopf gained 1.2% by launching a professional line and L'Oréal Paris gained 1.1% by launching an essential oil line alongside aggressive ATL and BTL marketing. Foreign biscuit brands gained 2.2% share: Chips Ahoy gained 0.3%, thanks to substantial ATL spending, expanded shelf space and a new flavor launch, and Danisa gained 0.4% through effective trade spending and in-store execution, including out-of-shelf displays, according to Kantar.

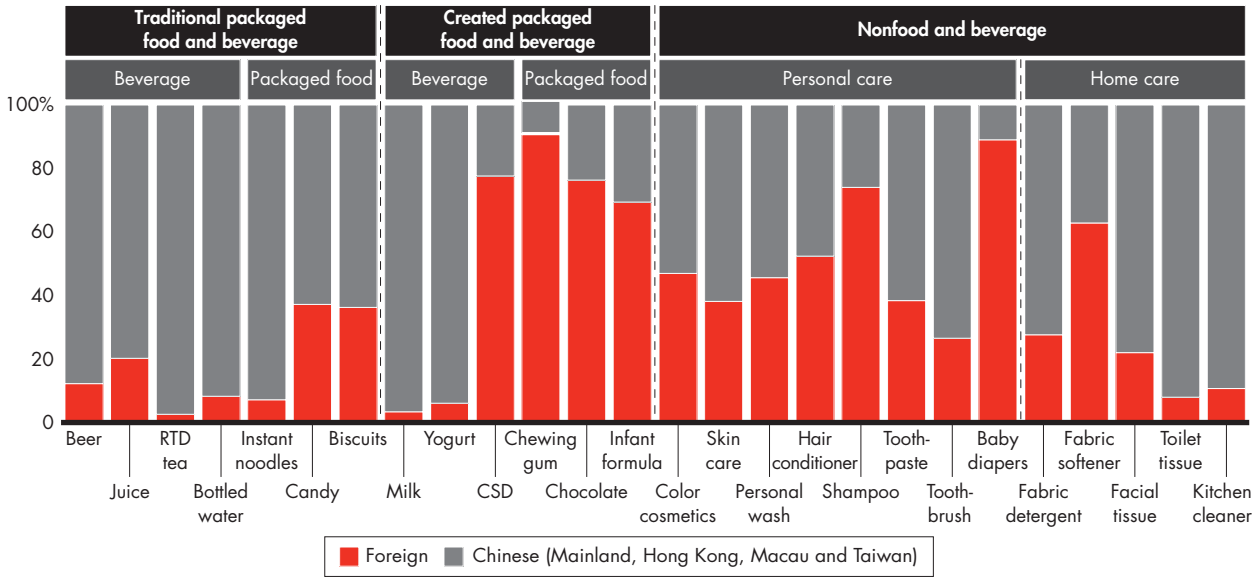
- On balance, about 60% of foreign brands lost share—many even lost in categories in which foreign brands gained share overall.

- Share loss affected all city tiers—even higher-tier cities, where foreign brands had enjoyed a strong presence. The largest loss occurred in Tier-2 and Tier-3 cities, where foreign brands have a relatively strong presence. Share decreased 1.7% in Tier-2 cities and 1.4% in Tier-3 cities. Share loss also occurred in lower-tier cities, where foreign brands have a weaker presence.

- Penetration change is the primary driver of underlying share change in both categories and city tiers.

Figure 13: Across the 26 categories we studied, Chinese brands dominate in food and beverage, except those launched by foreign brands and where brand trust is critical

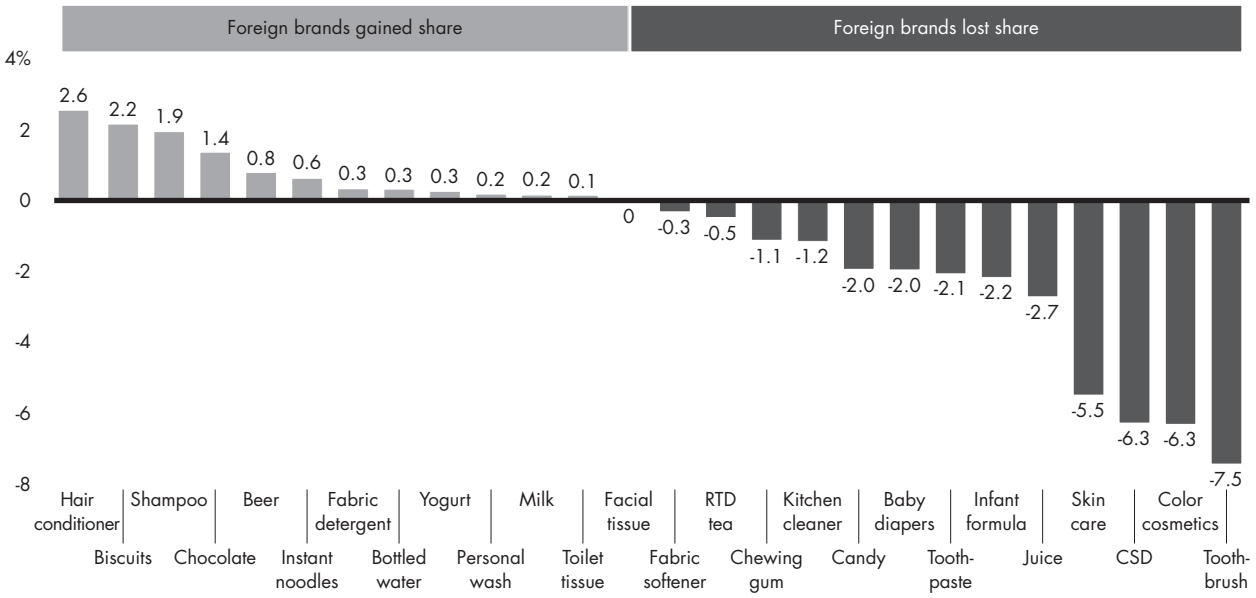
Category market share by foreign and Chinese brands, 2013



Notes: "Traditional" refers to a category that originally existed in China; "created" refers to a category that was later created or imported to China by a multinational corporation; data for infant formula and baby diapers are based on Kantar Worldpanel Baby
Sources: Kantar Worldpanel; Bain analysis

Figure 14: Foreign brands saw more than 5% share loss in several categories and only marginal share gain in others

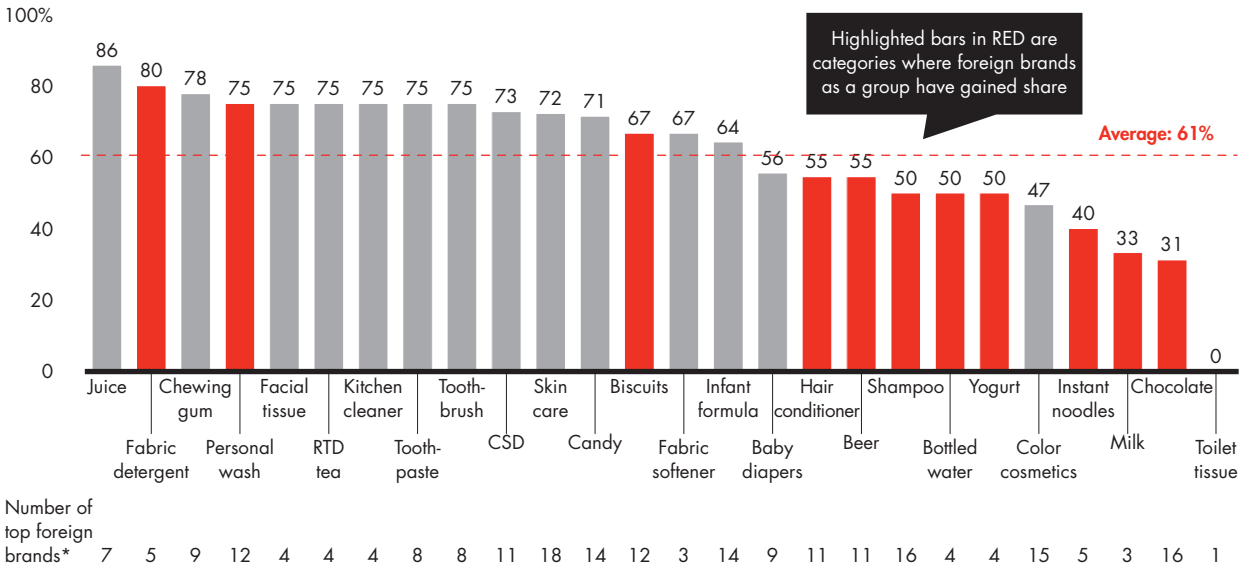
Change in foreign brands' share by category, 2012–13



Note: Data for infant formula and baby diapers are based on Kantar Worldpanel Baby
Sources: Kantar Worldpanel; Bain analysis

Figure 15: About 60% of foreign brands lost share—even in the categories in which foreign companies gained overall

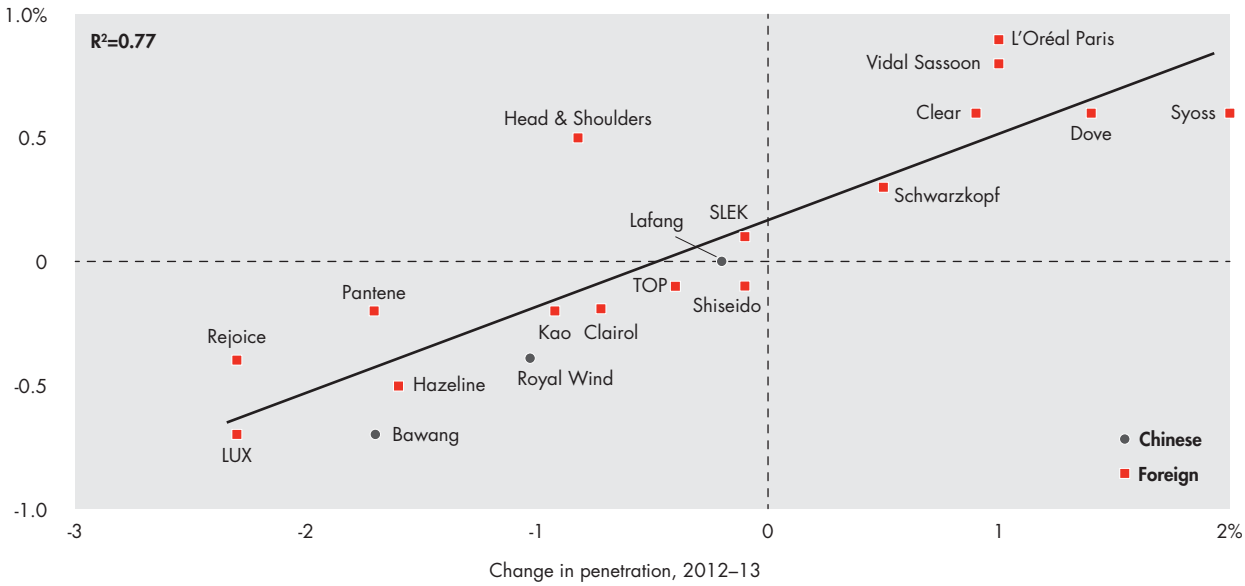
Of the total number of top foreign brands, percentage that lost share, 2013*



*Top brands are defined by two criteria: The brands' combined share represents at least 60% of the category, and each brand's share is at least 1%
Note: Data for infant formula and baby diapers are based on Kantar Worldpanel Baby
Sources: Kantar Worldpanel; Bain analysis

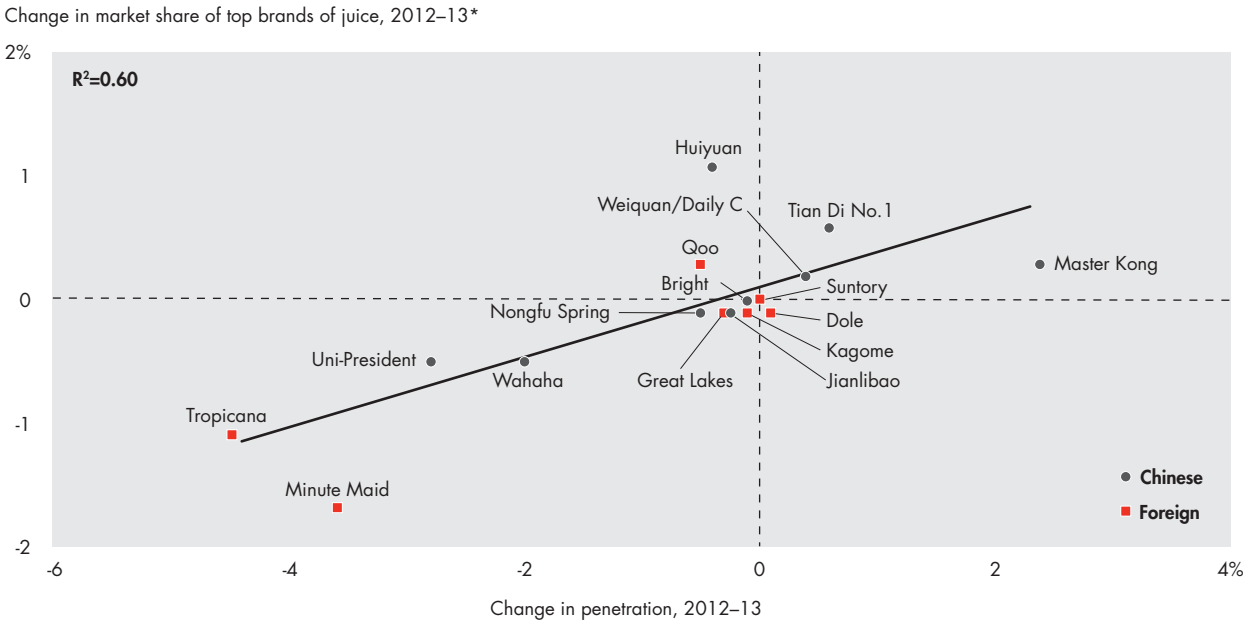
Figure 16: Across categories, a change in penetration led to a change in market share (shampoo example)

Change in market share of top brands of shampoo, 2012–13*



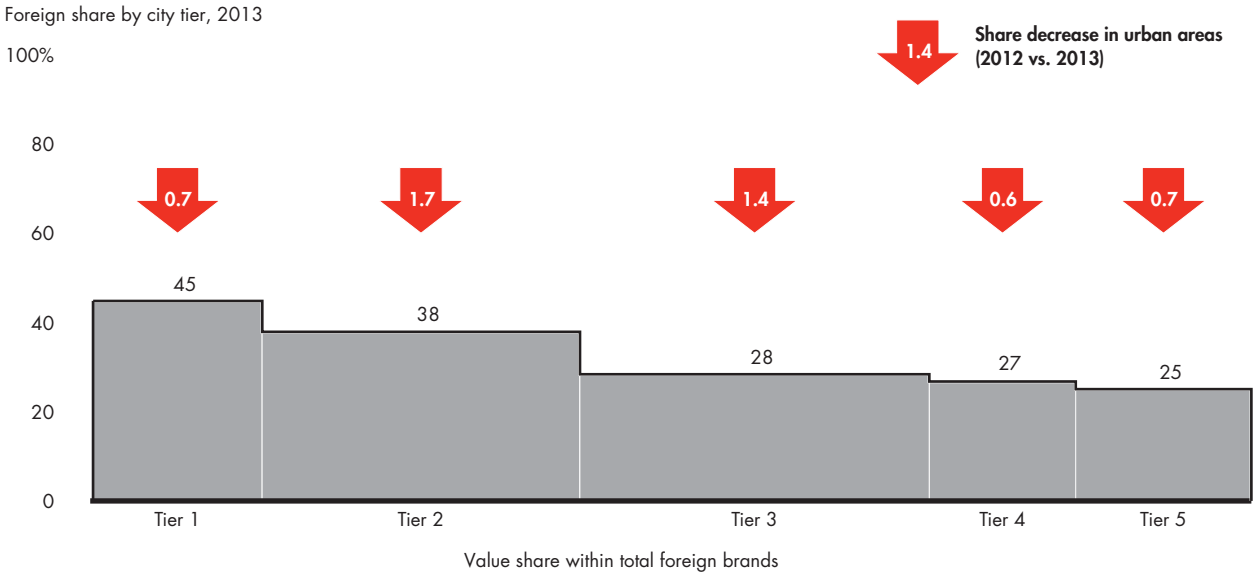
*Top brands are defined by two criteria: The brands' combined share represents at least 60% of the category, and each brand's share is at least 1%
Sources: Kantar Worldpanel; Bain analysis

Figure 17: Across categories, a change in penetration led to a change in market share (juice example)



*Top brands are defined by two criteria: The brands' combined share represents at least 60% of the category, and each brand's share is at least 1%
Sources: Kantar Worldpanel; Bain analysis

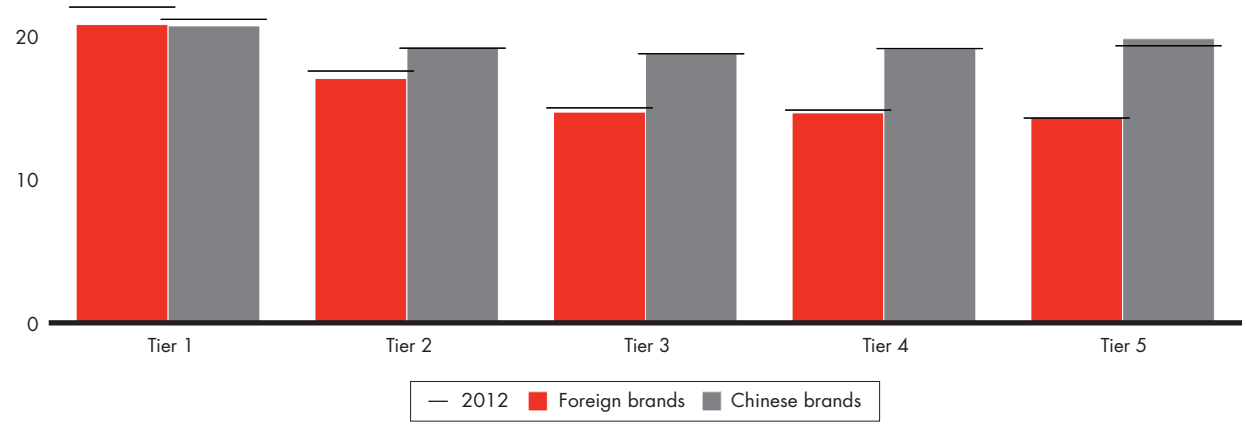
Figure 18: Foreign brands lost share in all city tiers—even in higher-tier cities, where they had a strong presence



Notes: Even if foreign brands had gained share in 12 categories, their overall share gains would have been less than their share loss incurred in other categories, and the weight of the categories in which they gained share would be less; thus, overall, foreign brands lost share in all city tiers; data covers all 26 categories; for infant formula and baby diapers, data is based on Kantar Worldpanel Baby, which covers Tier 1–2 cities
Sources: Kantar Worldpanel; Bain analysis

Figure 19: Change in share by city tiers is also affected by penetration; foreign brands' penetration declined across all city tiers

Average penetration in 26 categories: Top four foreign brands vs. top four Chinese brands
(%, 2012–13)



Notes: Data covers all 26 categories; for infant formula and baby diapers, data is based on Kantar Worldpanel Baby, which covers Tier 1–2 cities
Sources: Kantar Worldpanel; Bain analysis

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Our expertise is rooted in hard, quantitative evidence—evidence that has become the market currency for local and multinational FMCG brand and private label manufacturers, fresh food suppliers, retailers, market analysts and government organizations. We are not limited to the grocery sector; we have a wide range of panels in fields as diverse as entertainment, communications, petrol, fashion, personal care, beauty, baby and food on-the-go.

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