



中国彩妆市场趋势与展望

China Makeup Market Trends & Opportunities

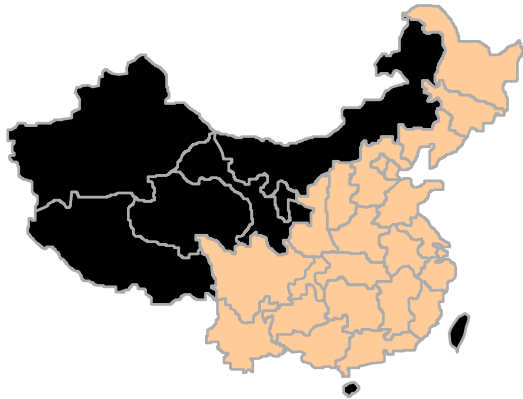
虞坚，凯度消费者指数中国区总经理

Jason Yu, General Manager, Kantar Worldpanel China

本次分享的数据来源

Data Source in this study

家庭购买样组 Household Panel



- Mainland **China**; **Urban** area
- **373 sample cities** in 20 provinces and 4 municipality cities across **5 city tiers**
- **40,000** urban permanent **households**
- **Scanner** in each sample household with standard scanning process to collect **FMCG** purchase data



个人使用样组 Usage Panel



- Mainland **China**; **Urban** area
- **Tier 1-2 cities**, 16 sample cities
- **6,000** urban **individuals**, covering **both genders**
- **7-day diary** to record full **personal care** routine
- **Questionnaire** to capture the demo, characteristics, wide behaviors and attitudes

议程

AGENDA

1

消费者趋势与市场挑战

Consumer Trends & Market Challenges

2

驱动品类增长的五个潜在机会

Five Opportunities to drive category

3

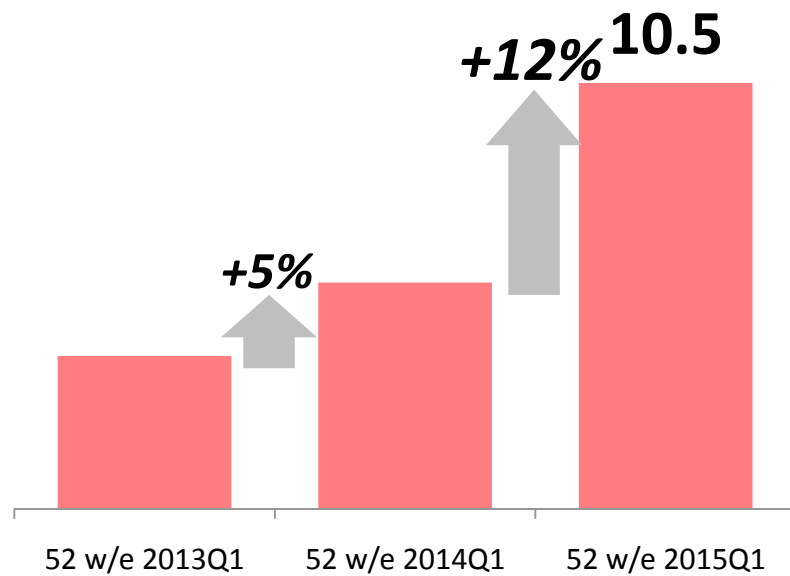
启示

Implications

彩妆市场经历高速增长的一年，超过一百亿人民币销售规模。

Makeup market growth remained strong last year, reaching 10.5 billion RMB annual sales.

化妆品市场规模(单位：十亿人民币)及成长率
Makeup Market in Billion RMB

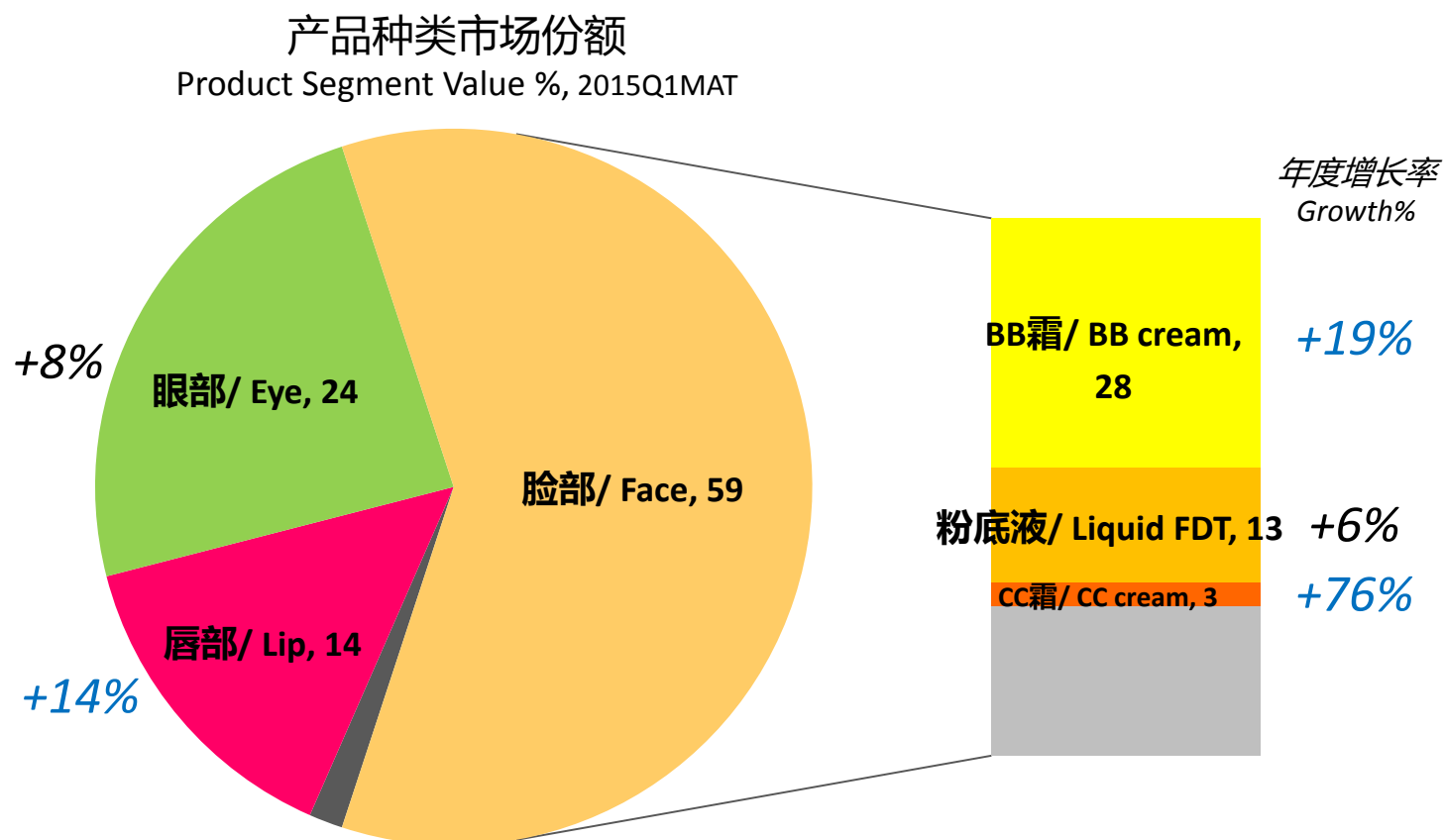


数据来源：凯度消费者指数，中国城市家庭样组

Source: Kantar Worldpanel, National Household Panel, Urban China Tier 1-5

BB/CC 霜和唇部产品增长迅猛。

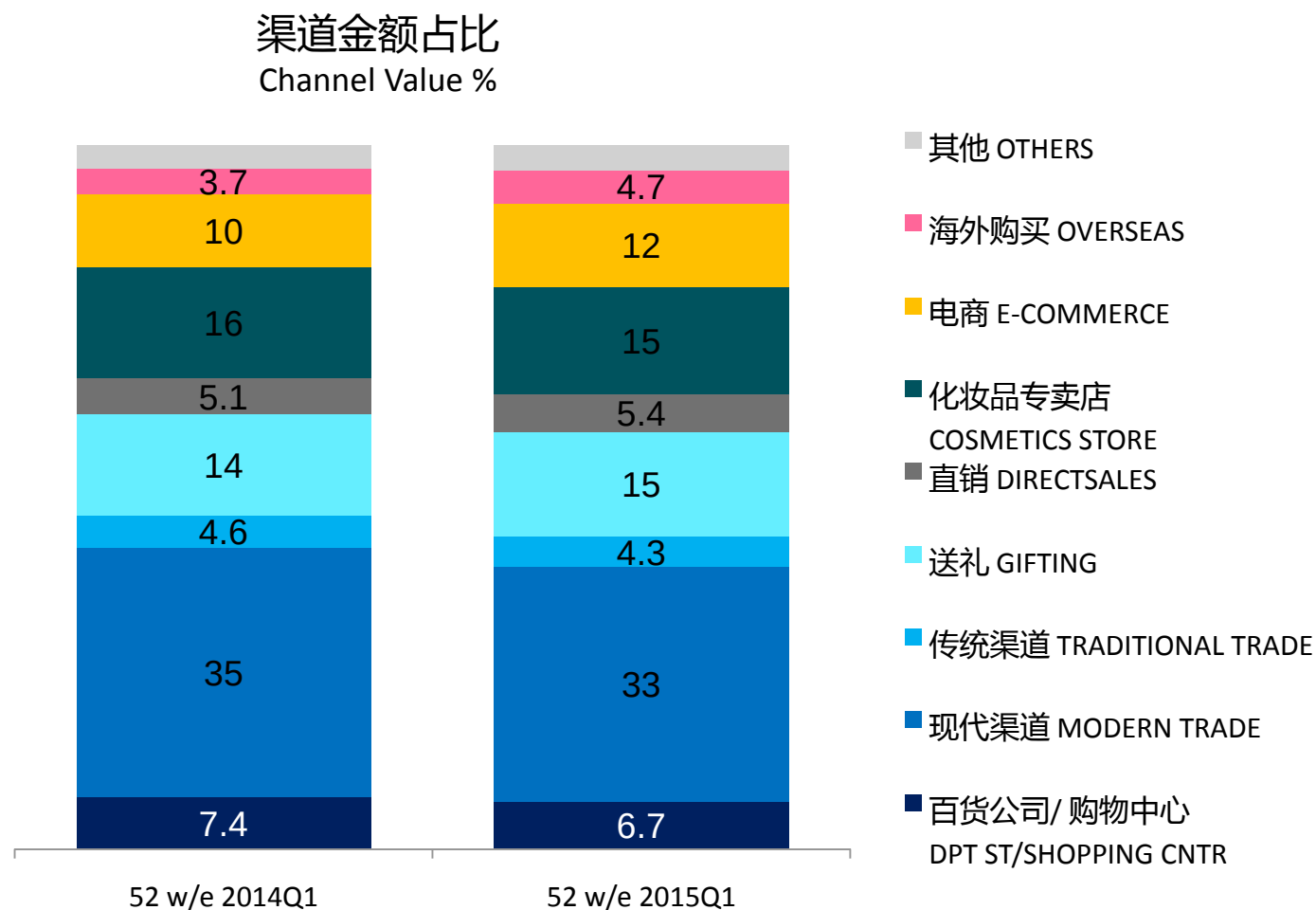
BB/CC cream and Lip products key engines to Makeup's growth.



数据来源：凯度消费者指数，中国城市家庭样组
Source: Kantar Worldpanel, National Household Panel, Urban China Tier 1-5

电商和海外购买快速兴起。

Share of E-Commerce and Overseas Purchase On the Rise.



数据来源：凯度消费者指数，中国城市家庭样组

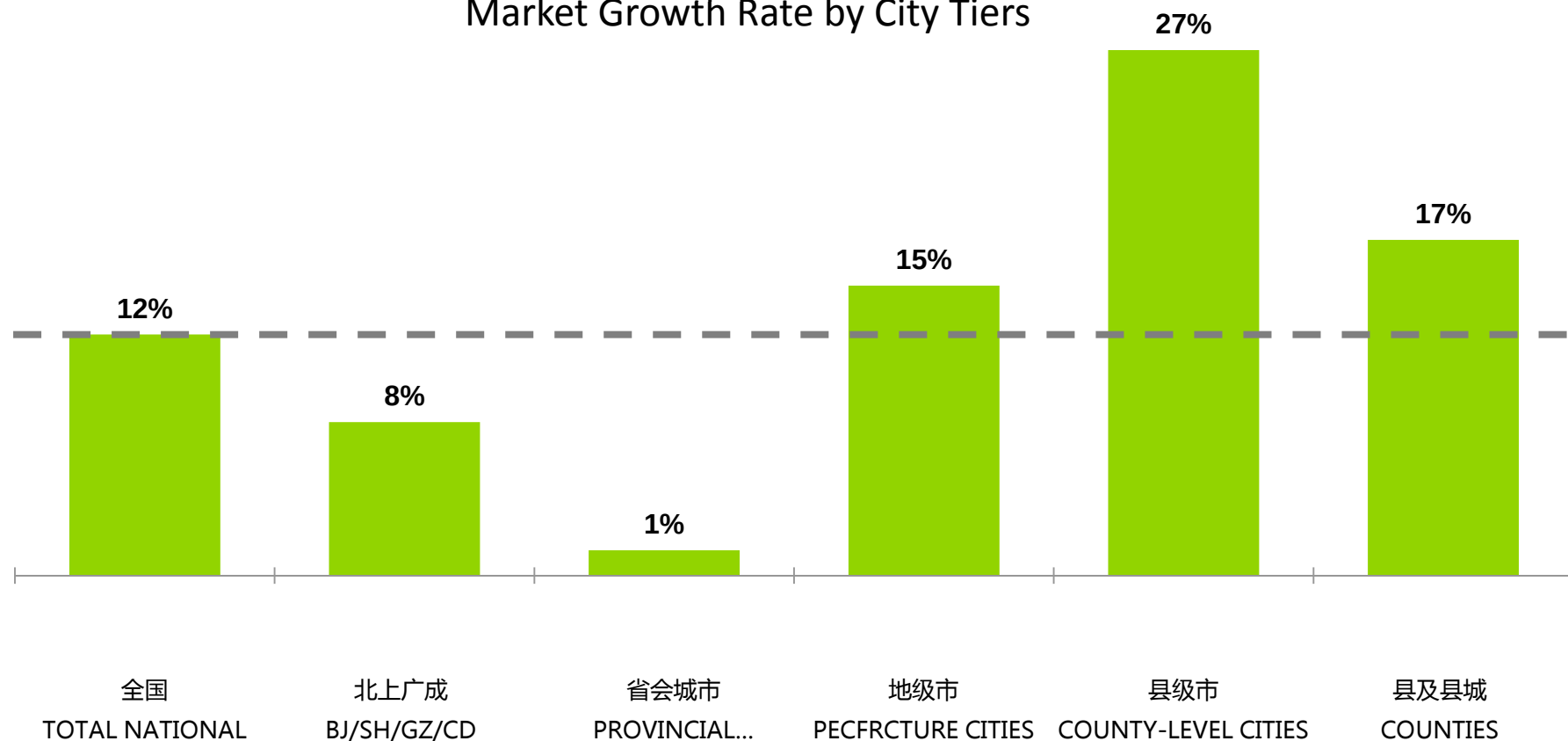
Source: Kantar Worldpanel, National Household Panel, Urban China Tier 1-5

下线城市已成为品类成长动力来源。

Lower city tiers drive the category growth.

按不同城市级别化妆品市场成长率

Market Growth Rate by City Tiers

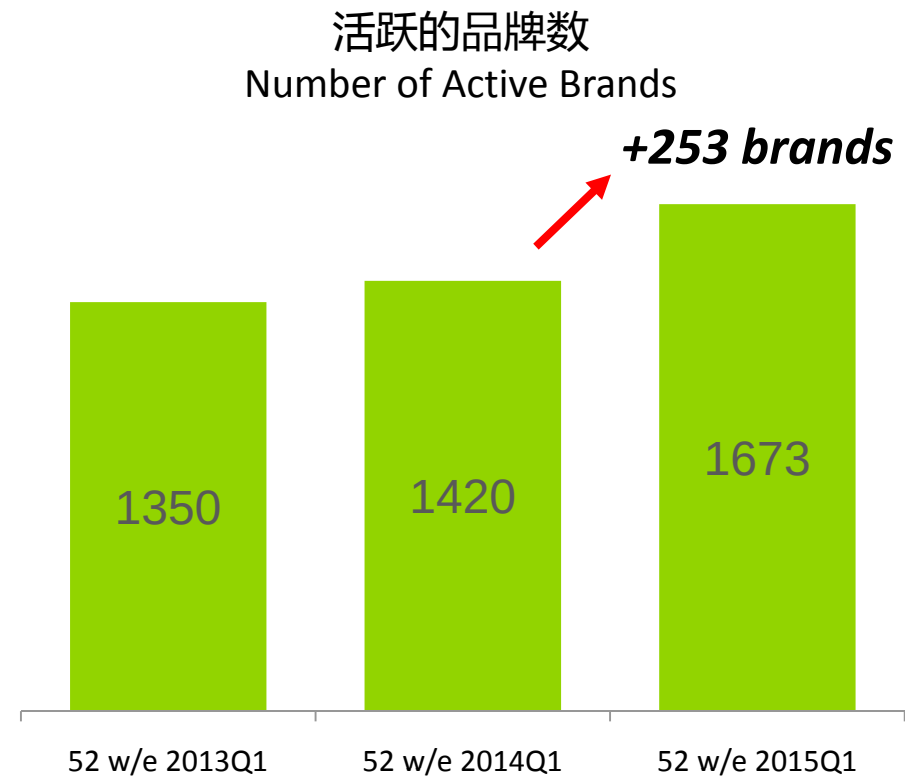


数据来源：凯度消费者指数，中国城市家庭样组

Source: Kantar Worldpanel, National Household Panel, Urban China Tier 1-5

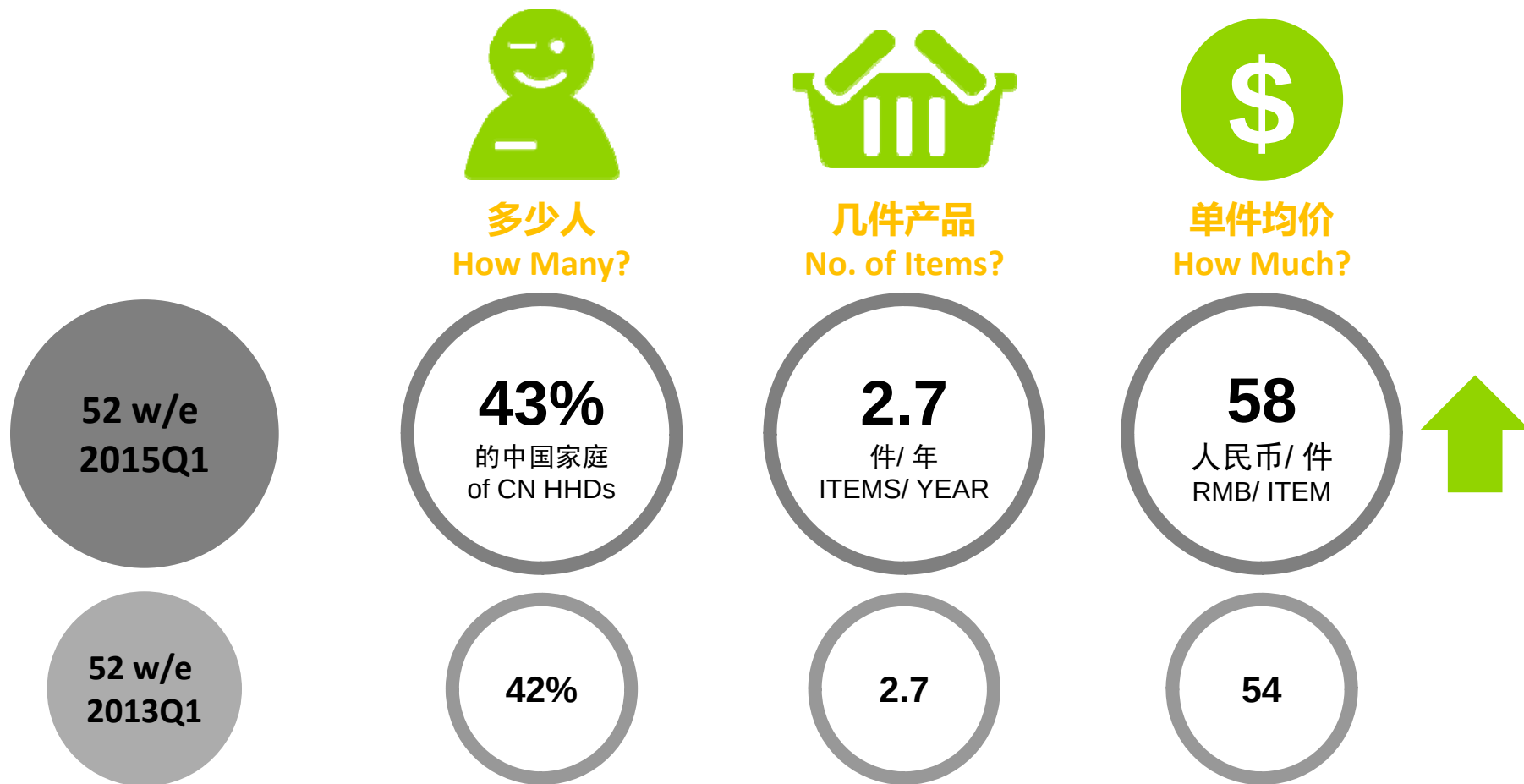
但竞争亦日益剧烈。

The competition is also more intensified.



数据来源：凯度消费者指数，中国城市家庭样组
Source: Kantar Worldpanel, National Household Panel, Urban China Tier 1-5

过去三年来产品均价有所提升，而购买者基数及每个人购买的产品数却没有显著增加。
More premium products are chosen, yet buyer base and number of products bought stable.

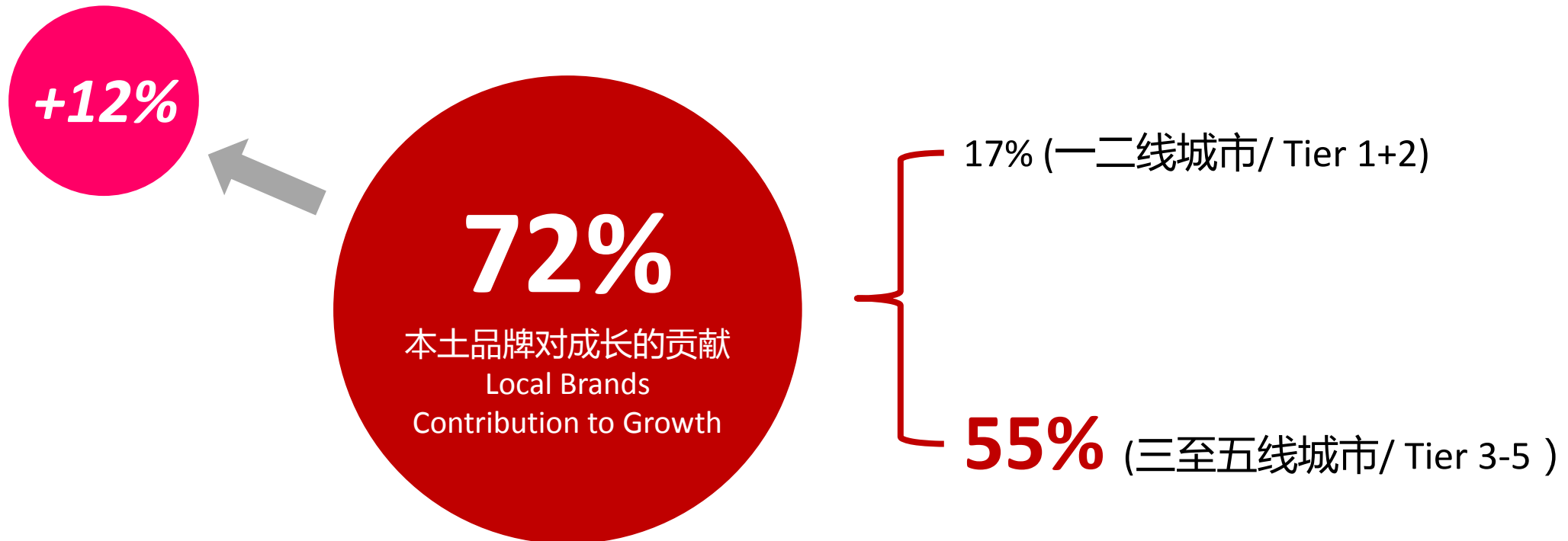


数据来源：凯度消费者指数，中国城市家庭样组
Source: Kantar Worldpanel, National Household Panel, Urban China Tier 1-5

本土品牌对市场的增长有很大的贡献，且主要来自在下线城市的发展。

Local brands contribute the most to market growth, mainly boosted by development in low-tiers.

化妆品市场成长率
Makeup Market GR



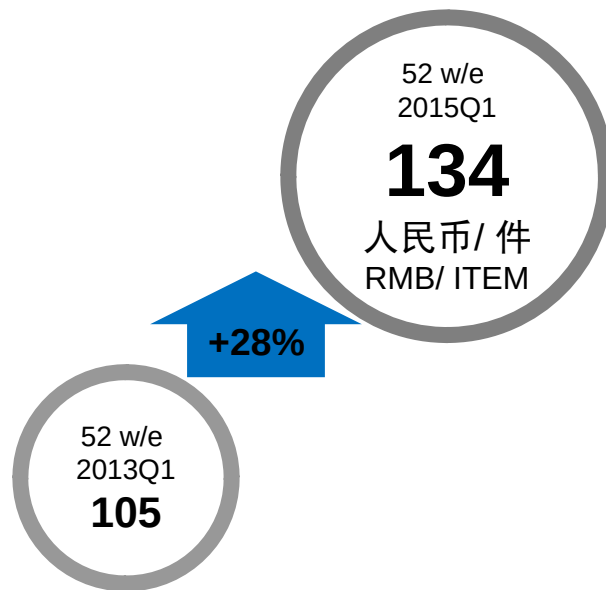
数据来源：凯度消费者指数，中国城市家庭样组

Source: Kantar Worldpanel, National Household Panel, Urban China Tier 1-5

高端化在某些产品细分尤其明显，如粉底液。

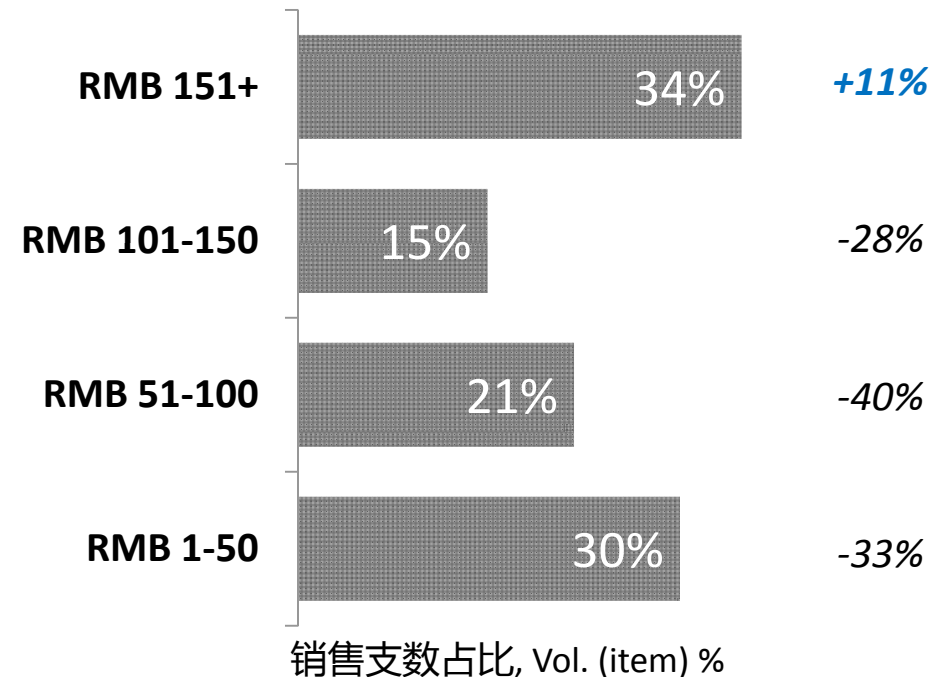
Trading up is particularly evident in certain product segments, such as Liquid Foundation.

粉底液每瓶均价
Liquid Foundation Average Price/ Item



粉底液市场价格分析
Liquid Foundation Price Structure

销量增长率
Growth% vs. 2YA

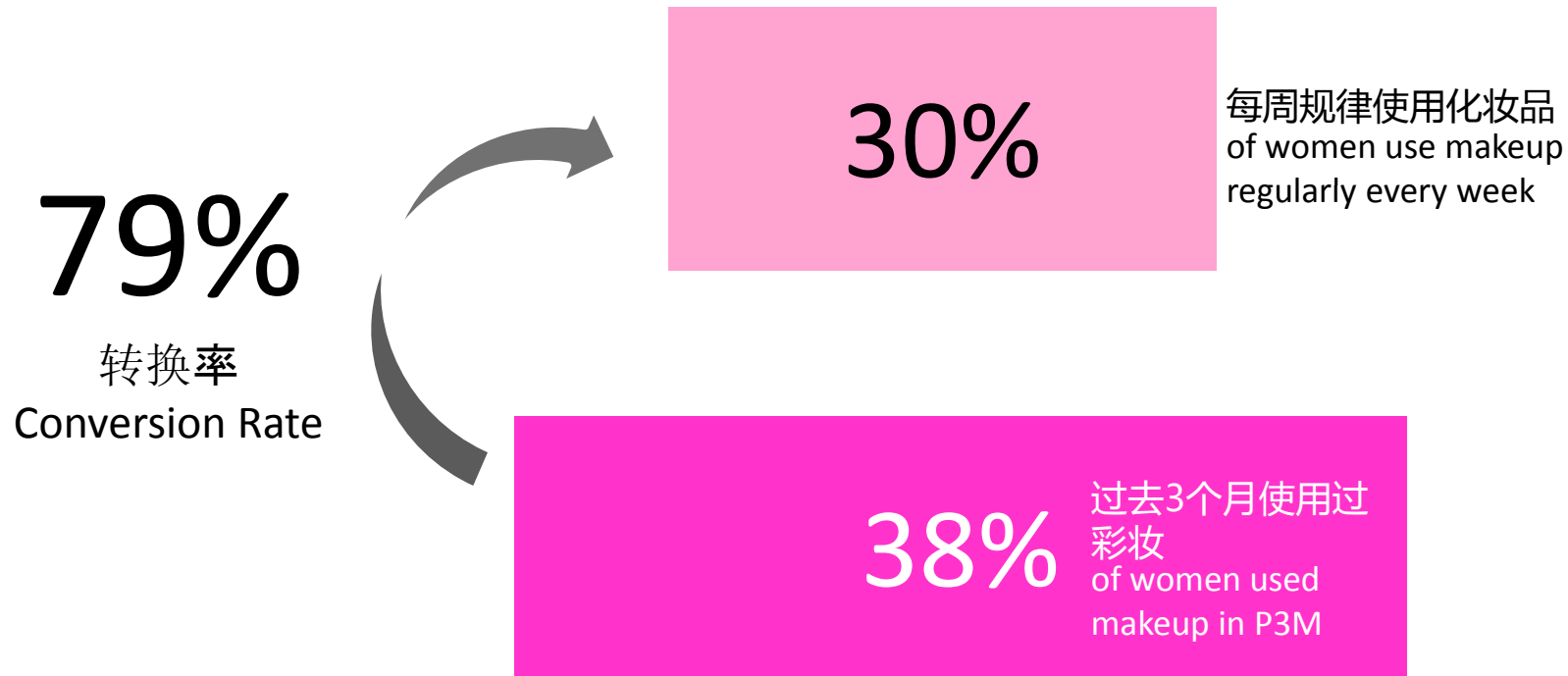


数据来源：凯度消费者指数，中国城市家庭样组

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购买化妆品的消费者大多会养成使用的习惯

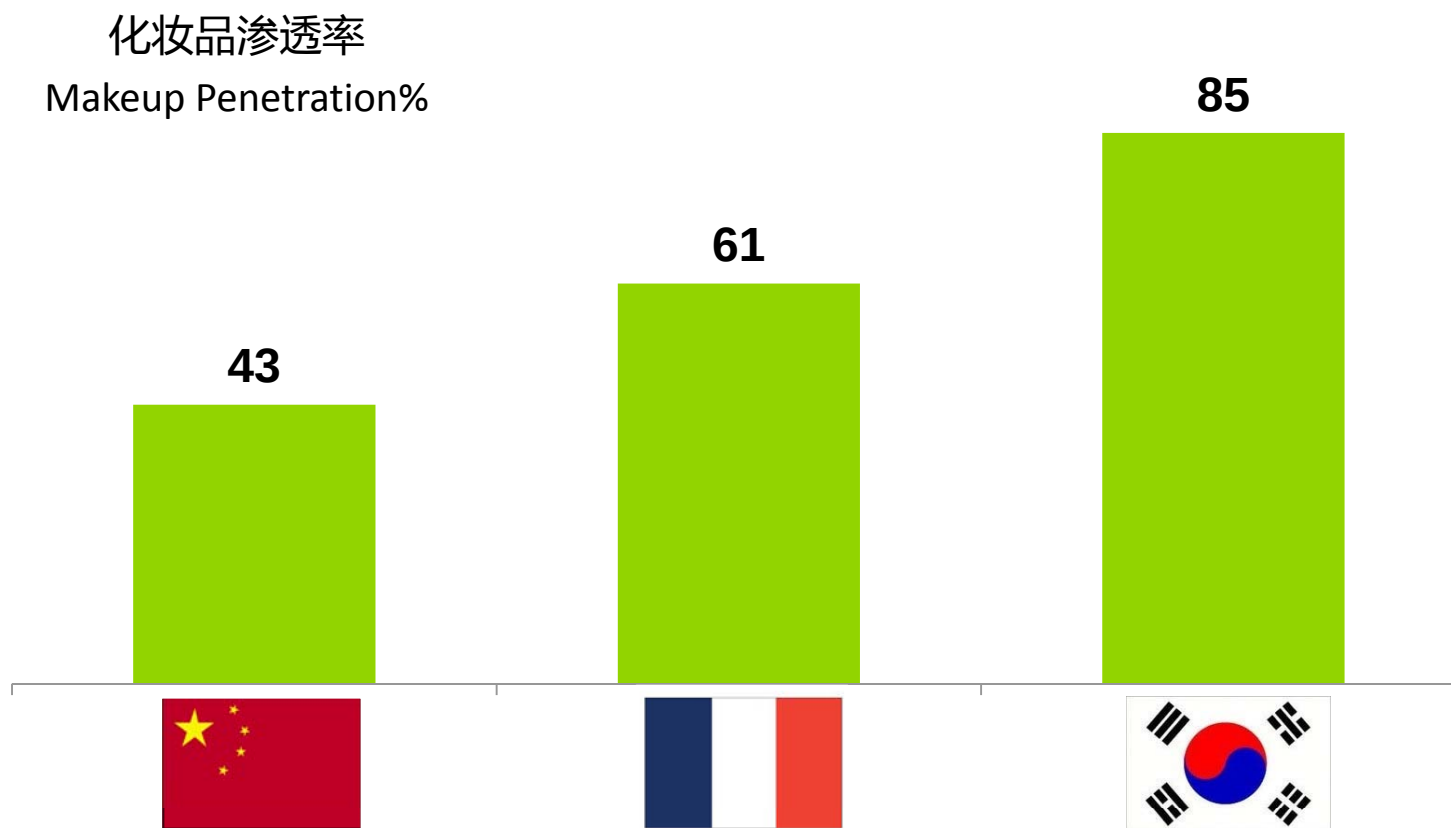
Good conversion from purchase into weekly makeup usage



数据来源：凯度消费者指数，中国城市家庭样组 & 13-55岁使用样组
Source: Kantar Worldpanel, National Household Panel & 13-55 y.o. Usage Panel, Tier 1-2

中国的化妆品渗透率仍有继续成长的空间。

Still big room to grow Makeup penetration in China.



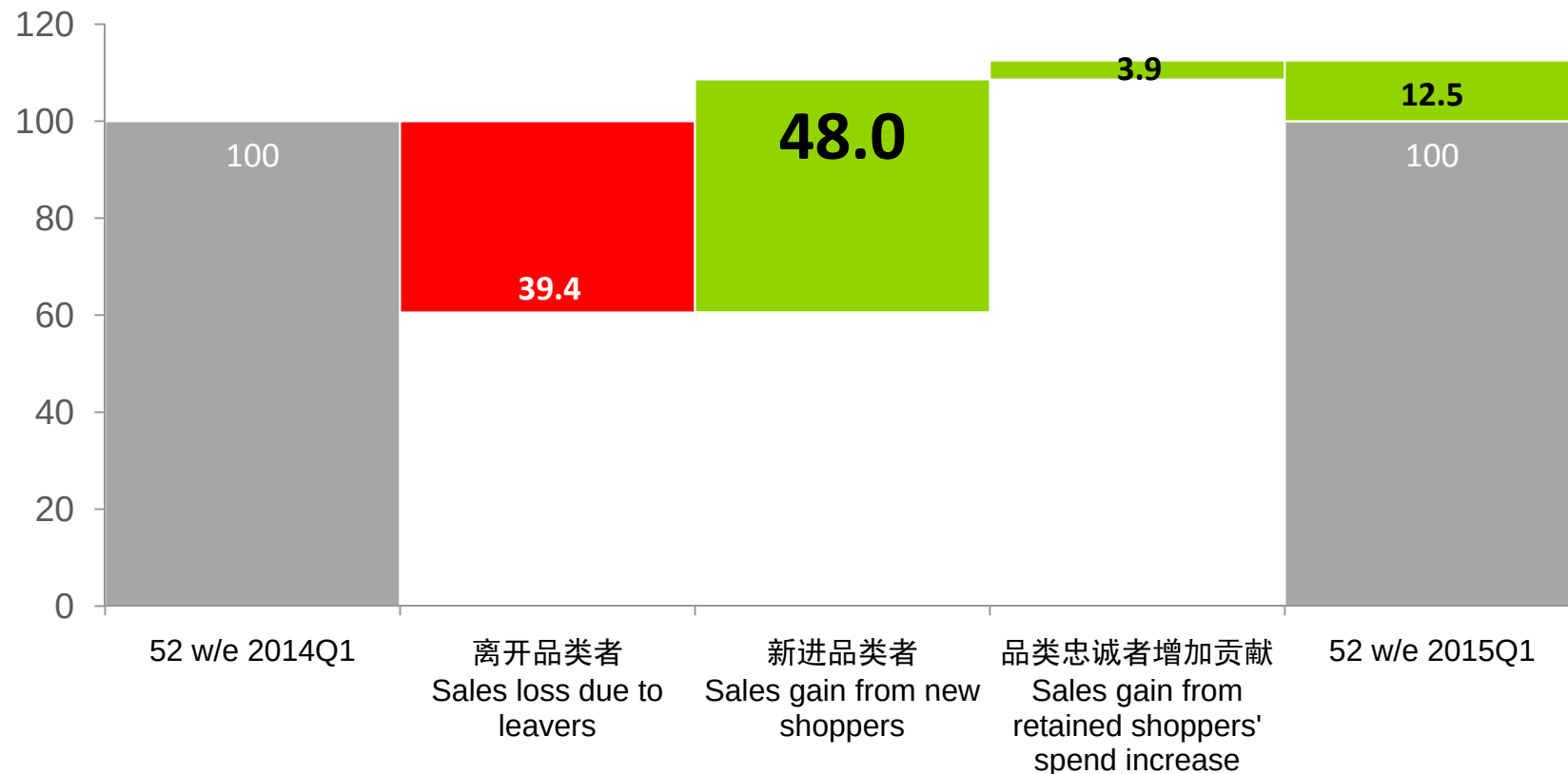
数据来源：凯度消费者指数，中国城市家庭样组

Source: Kantar Worldpanel, National Household Panel, Urban China Tier 1-5

新购买者对品类成长的贡献高，持续招募品类购买者刻不容缓。

Makeup category is a leaking bucket; new buyer recruitment is critical to the category growth.

化妆品销售额指数 Makeup indexed sales value (52 w/e 2014Q1=100)



数据来源：凯度消费者指数，中国城市家庭样组

Source: Kantar Worldpanel, National Household Panel, Urban China Tier 1-5

小结

Summary

从购买到使用的转换率高
High conversion from
purchase to regular usage

购买渗透率低于发达市场
Low purchase penetration;
gap with developed markets

新购买者对品类成长贡献高
Higher value contribution
from new buyers



让更多女性开始购买和使用化妆品，是驱动品类成长的关键
Driving trials & build
penetration is paramount to
category growth

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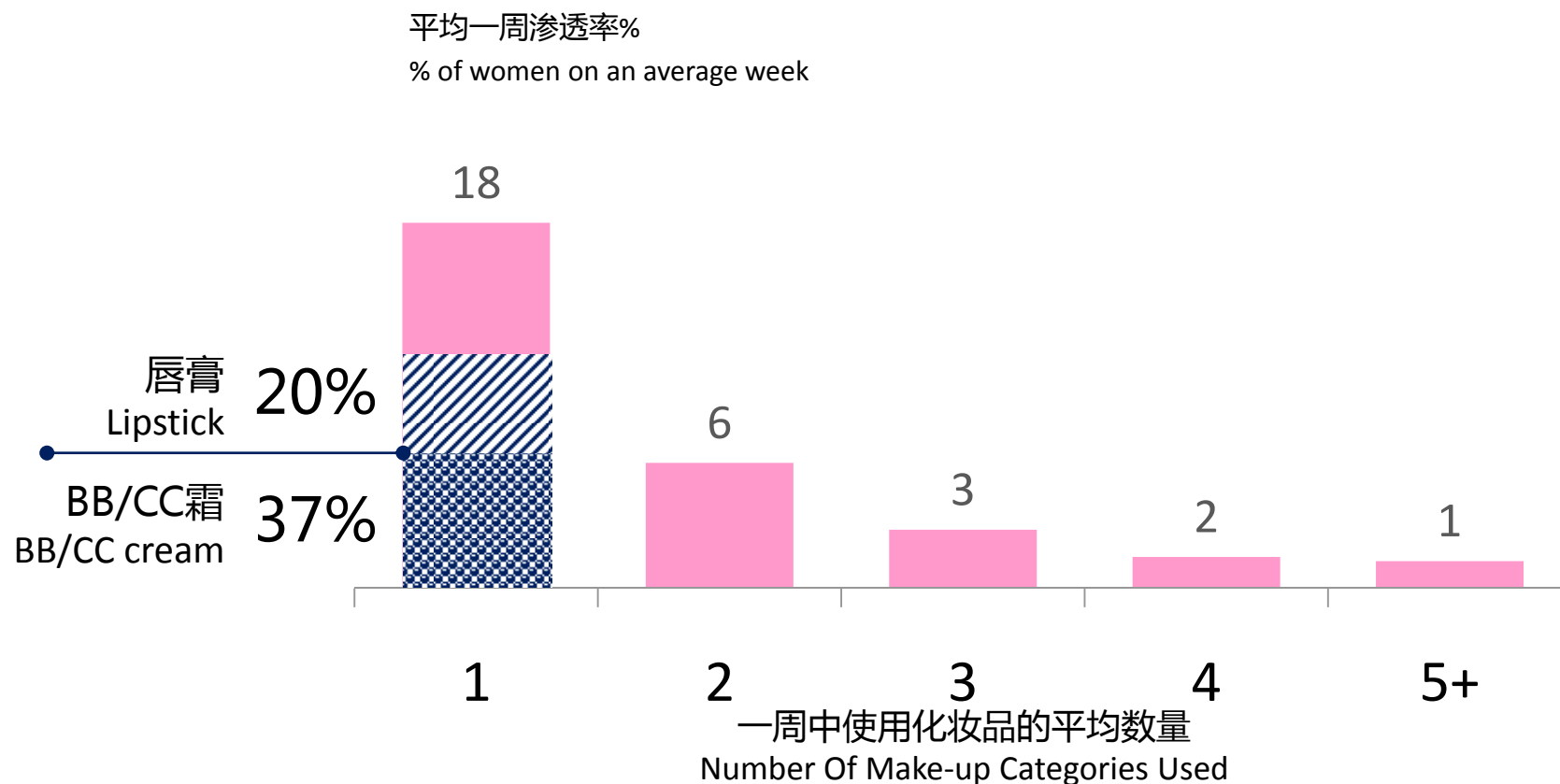
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启示

Implications

大部分化妆女性一周中只使用一个化妆品，其中BB/CC霜和唇膏最主流。

Most women only use one product in a week, the majority uses BB/CC cream or Lipstick.



数据来源：凯度消费者指数，13-55岁使用样组，北上广成及省会城市
Source: Kantar Worldpanel, Usage Panel, Urban China Tier 1-2, 13-55 y.o.

BB/CC霜产品日益被消费者作为彩妆使用

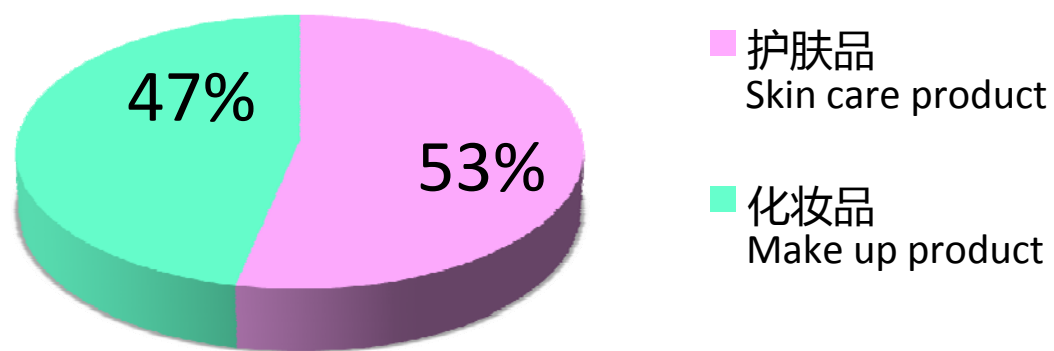
BB/CC cream serves more as a makeup product now.

BB/CC霜在女性眼中是什么产品？

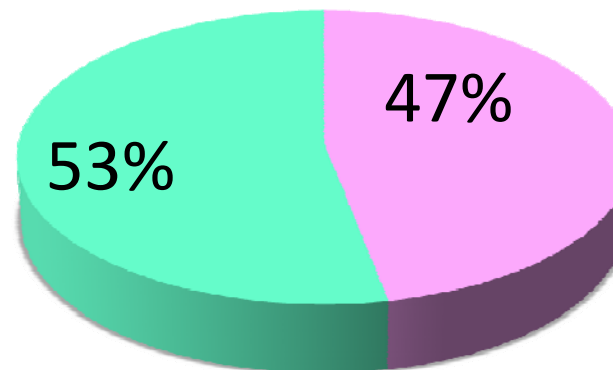
The role of BB/CC cream from women's perspective

% BB/CC霜使用次数

% of occasions using BB/CC cream



2012



2014

数据来源：凯度消费者指数，13-55岁使用样组，北上广成及省会城市
Source: Kantar Worldpanel, Usage Panel, Urban China Tier 1-2, 13-55 y.o.

第一个机会点：打造完美无瑕的肌肤是潮流。

Opportunity 1: Flawless skin with perfect coverage leads the trend.

壁咚 Bi-Dong



15%

两年前/ 2 YA

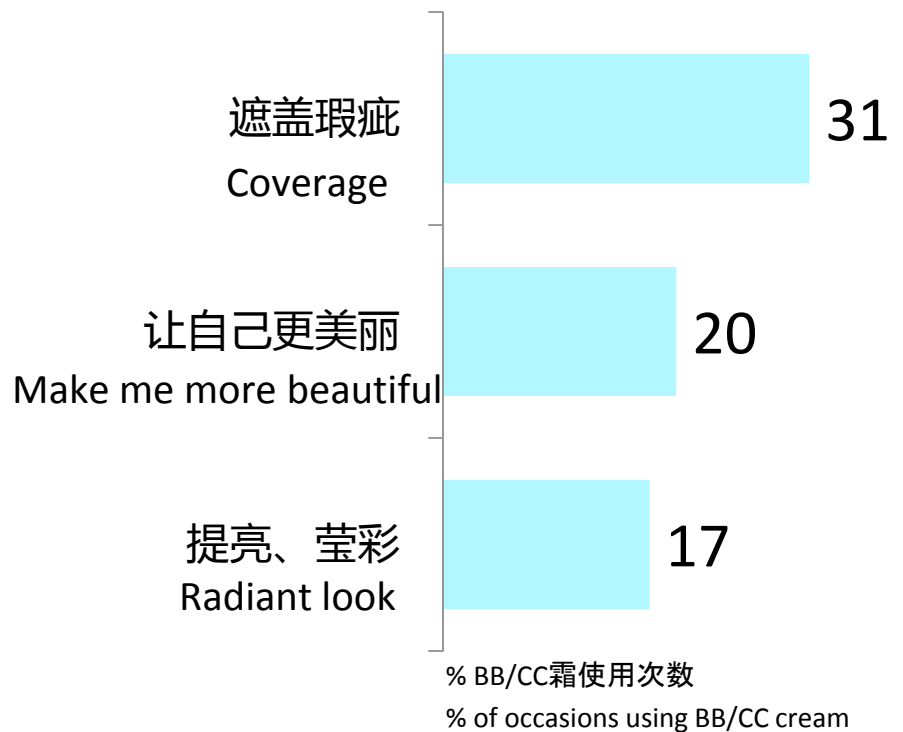
22%

现在 now

“无暇”妆效在脸部化妆品中销售量占比
“Flawless” effect volume weight in Facial Makeup

女性使用BB/CC霜的目的

Benefits women look for using BB/CC cream



数据来源：凯度消费者指数，中国城市家庭样组 & 13-55岁使用样组

Source: Kantar Worldpanel, National Household Panel (Tier 1-5) & 13-55 y.o. Usage Panel (Tier 1-2)

韩国品牌在遮瑕、莹彩等功效中表现最优。

Korean BB/CC brands over-perform in makeup benefits.

109

相对其他品牌，韩妆品牌在美妆功效*
的表现指数

Index of performance in makeup effect*
of Korean brands compared to average

MISSHA

LANEIGE

Mamonde
梦妆



数据来源：凯度消费者指数，13-55岁使用样组，北上广成及省会城市
Source: Kantar Worldpanel, Usage Panel, Urban China Tier 1-2, 13-55 y.o.

第二个机会点：满足消费者使用化妆品时的护肤需求。

Opportunity 2: Satisfy consumers' skin care needs when making up.



数据来源：凯度消费者指数，中国城市家庭样组
Source: Kantar Worldpanel, National Household Panel, Urban China Tier 1-5

尤其做好美白和补水。

Whitening and Hydration deserve the focus.

30%

美白是第三大需求

Whitening is the 3rd biggest benefit in
BB/CC cream & still growing

% BB/CC霜使用次数，美白功效的占比

% of occasions using BB/CC cream, the importance of whitening

+34%

14 VS 12

补水越来越重要

Hydration is playing a more and
more important role

补水功效的重要性变化，2014 VS 2012

The GR% of importance of hydration benefit, 14 VS 12

数据来源：凯度消费者指数，13-55岁使用样组，北上广成及省会城市

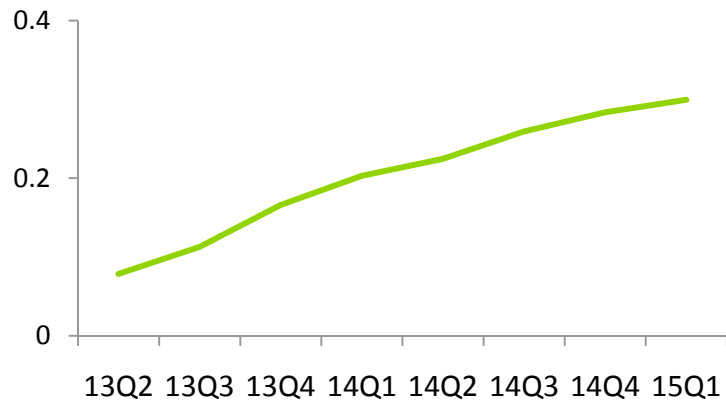
Source: Kantar Worldpanel, Usage Panel, Urban China Tier 1-2, 13-55 y.o.

传统护肤品牌主打护肤功效成功进入化妆品市场。

Skin care brands gained shoppers and sales entering BB cream business.

百雀羚BB霜渗透率

Pechoin BB Cream MAT Penetration%



韩束美白功能BB霜

KanS Whitening BB cream

+220%

2015Q1MAT vs. YA

数据来源：凯度消费者指数，中国城市家庭样组

Source: Kantar Worldpanel, National Household Panel, Urban China Tier 1-5



第三个机会点：抓住创新产品时机为市场注入活力。

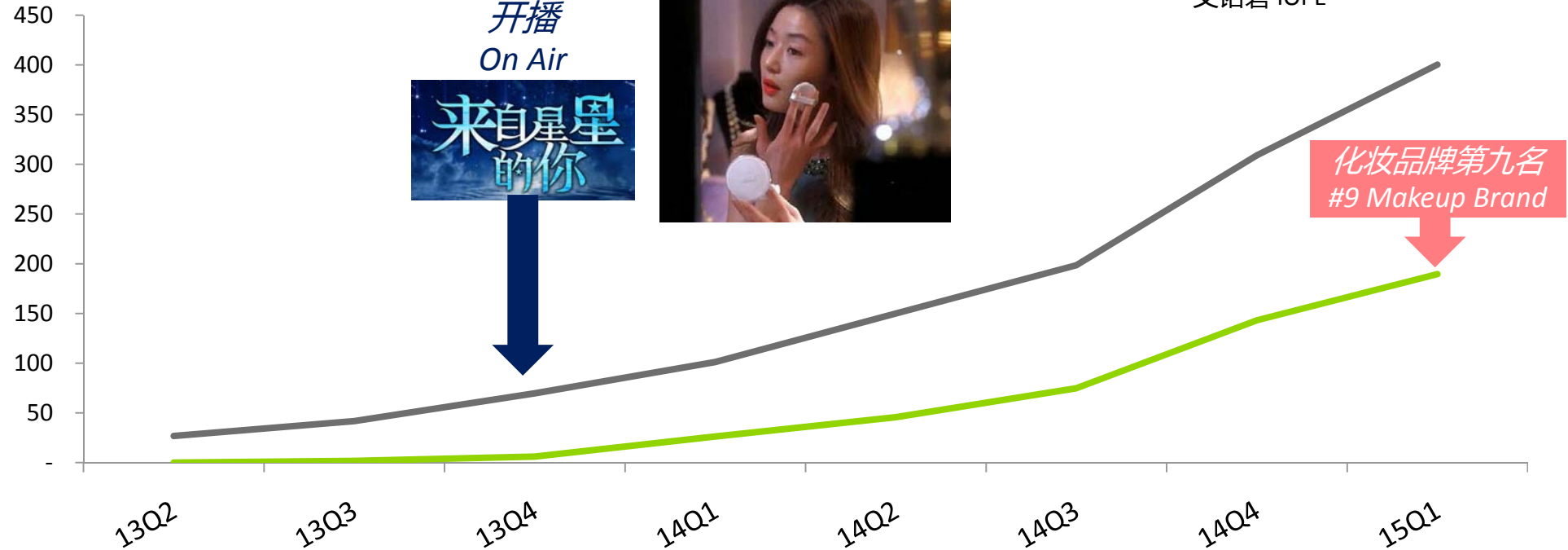
Opportunity 3: Innovations to excite the market.

整体气垫产品及艾诺碧年度滚动销售额

Total Cushion & IOPE Value in MAT

百万人民币

Mil. RMB



数据来源：凯度消费者指数，中国城市家庭样组

Source: Kantar Worldpanel, National Household Panel, Urban China Tier 1-5

革命尚未成功，企业仍须努力：单一创新概念并不能成为万灵丹。

One successful innovation might not be answer for ALL.

气垫腮红
Blush Cushion



气垫口红！
Lip Cushion！



气垫眼线？
Eyeliner Cushion ？

第四个机会点：拥抱网络及数字科技进行消费者互动。

Opportunity 4: Consumer engagement through ecommerce and digital interaction to boost sales.



数据来源：凯度消费者指数，中国城市家庭样组

Source: Kantar Worldpanel, National Household Panel, Urban China Tier 1-5

利用数字科技化妆品体验及互动式行销。

Transform Makeup category through digital experience and interactive marketing.

个人化 Personalization



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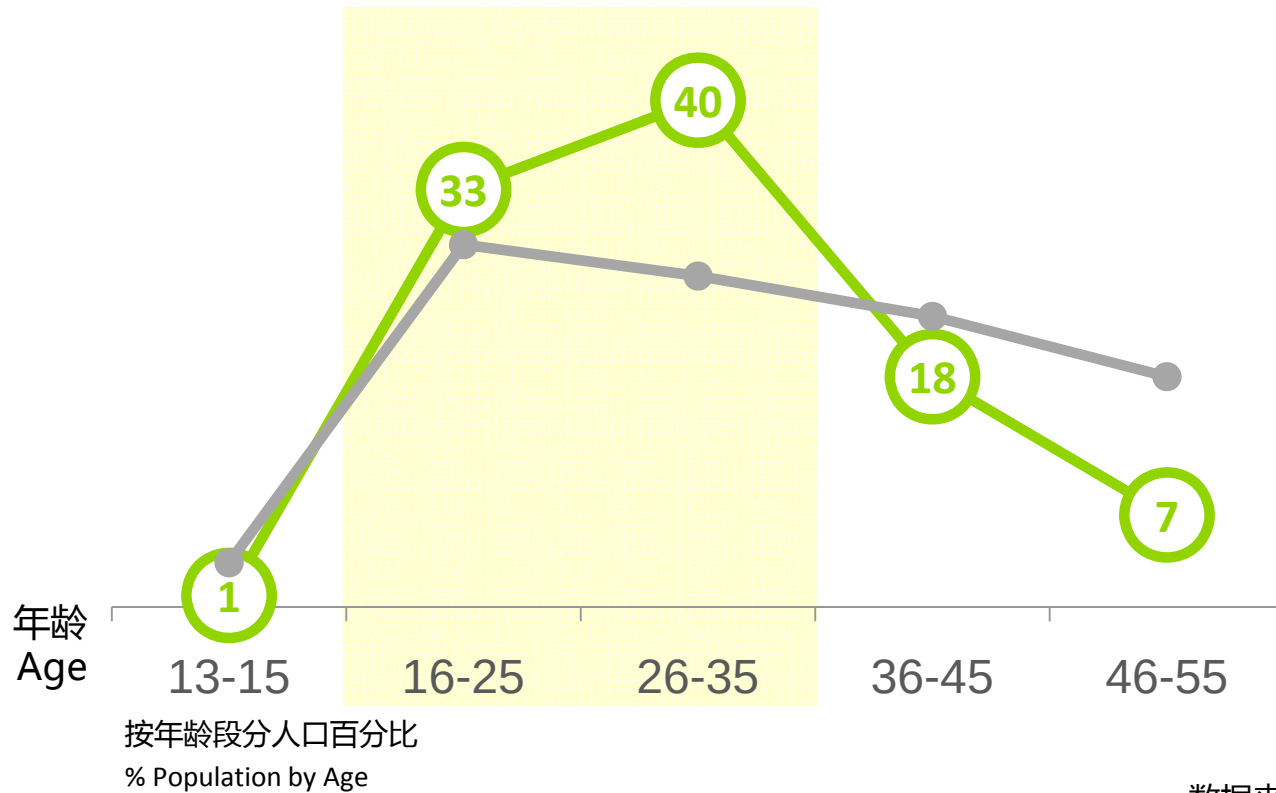
韩国馆

可及性 Accessibility

数字技术及网购帮助品牌赢得年轻主力消费族群。

Digital and E-commerce bring brands closer to the Young Consumers.

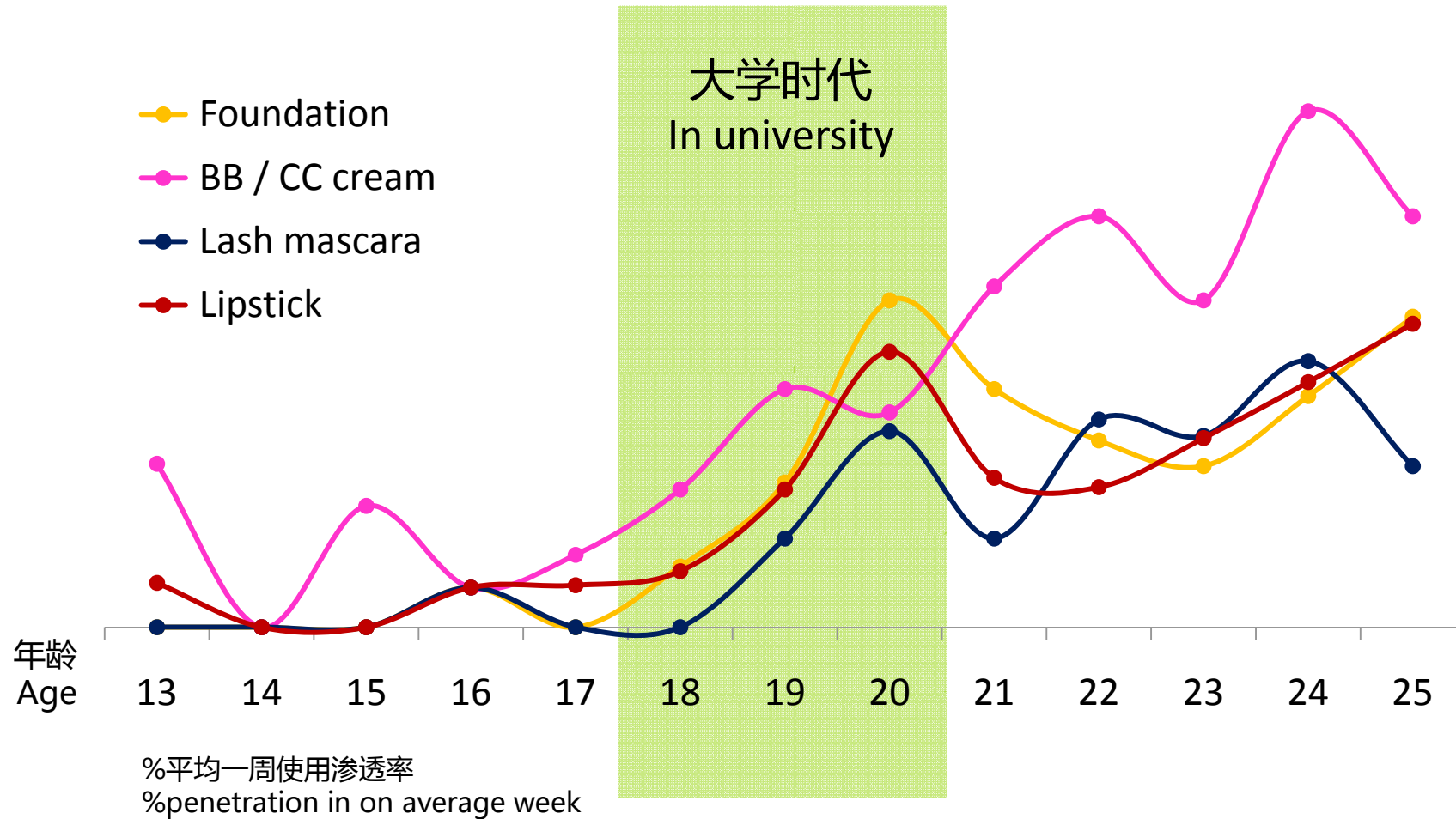
化妆品网购族 Online Makeup Shoppers 全体女性 All Women



数据来源：凯度消费者指数，13-55岁使用样组，北上广成及省会城市
Source: Kantar Worldpanel, Usage Panel, Urban China Tier 1-2, 13-55 y.o.

第五个机会点：赶早。女生普遍进入大学后开始化妆，这是抓住她们的关键时期。

Opportunity 5: Get in there first. University is the critical time to educate and capture girls



数据来源：凯度消费者指数，13-55岁使用样组，北上广成及省会城市
Source: Kantar Worldpanel, Usage Panel, Urban China Tier 1-2, 13-55 y.o.

唇膏在今年大热，主要是受到90后年轻女孩的追捧。

Lipstick became a big fashion in 2014, sought for by the Post-90's young girls.



2014年比2013市场新增加
Market growth from Y13 to Y14

114 百万人民币 million RMB

2.5 百万消费者 million shoppers

70% 来自16-25岁年轻女性
from women 16-25 years old

数据来源：凯度消费者指数，13-55岁使用样组，北上广成及省会城市
Source: Kantar Worldpanel, Usage Panel, Urban China Tier 1-2, 13-55 y.o.

年轻一族喜好可以成为市场的驱动力

Aspiration of Young consumers can spur new growth

红色 Red

129

指数=16-25岁 / 平均
Index = Age 16-25 / Average



橙色 Orange

+45%

成长率%, 2014比2013
GR% of 2014 VS 2013



粉紫色 Pinkish purple

咬唇新潮流

Lip-biting new fashion



数据来源：凯度消费者指数，13-55岁使用样组，北上广成及省会城市
Source: Kantar Worldpanel, Usage Panel, Urban China Tier 1-2, 13-55 y.o.

启示

Implications

1

吸引更多中国女性开始购买使用彩妆是驱动品类成长的关键
Driving trials & build penetration is core to category growth

2

满足中国女性消费者使用彩妆时的护肤及妆效需求
Win at satisfying consumers' skin care & makeup effect needs

3

抓住年轻消费族群的喜好：新颖的产品，数字互动体验，最潮话题/妆容
Bring excitement to young consumers: *product innovation, digital experience, the IN-topic/ fashion*

