

Colour Cosmetics - China - June 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“When targeting a face base make-up product at women aged 30 or above, the feature ‘have benefits on skin appearance’ is listed as the most important feature to have.”

– Anne Yin, Associate Research Analyst

This report looks at the following areas:

- Invisible price competition in lipsticks
- Building the new nude look
- Enhance the adoption of eye shadow palette

The China colour cosmetics market is estimated to draw near to RMB40 billion by the end of 2019, with a projected CAGR 11.1% over the next five years. Both imported premium and domestic mass brands are thriving and have enhanced their reach both online and offline, increasing market competition. Educated by KOLs and product reviews, consumers are becoming savvier, and questioning the value of products that fall within their budgets.

51% of surveyed consumers have used more than five selected make-up products, although overall 64% of respondents prefer a nude look over a delicate finish. 59% of respondents say they tend to change their make-up styles to follow a trend, yet 69% of them still stick to buying plain and daily wearable colours.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Colour Cosmetics - China - June 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

- What you need to know
- Covered in this report
- Excluded
- Subgroup definitions (by Monthly Personal Income)

Executive Summary

The market

Colour cosmetics leads growth of BPC market

Figure 1: Best- and Worst-case forecast of total value sales of colour cosmetics market, China, 2014-24

Lip segment still leads growth while eye segment is catching up

Figure 2: Sales value and annual value growth rate of colour cosmetics market, by segment, China, 2017-18

Companies and brands

Figure 3: Leading manufacturers' share of value sales of colour cosmetics market, China, 2017-18

The consumer

Make-up users seen across age groups and city tiers

Figure 4: Rate of make-up application – Yes, by age, February 2019

Cushion BB/CC creams and foundation are selected together by most users

Figure 5: Colour cosmetics used in the last six months, February 2019

Pinching most of their pennies on eye shadow

Figure 6: Price ranges, by product, February 2019

Prudent, product review driven consumers

Figure 7: Consideration factors for purchasing colour cosmetics, February 2019

Skin appearance benefits rank third among face base make-up features

Figure 8: Important product features of face base make-up, February 2019

Women using multiple dedicated products to build a flawless nude look

Figure 9: Look preference, 2017 vs 2019

What we think

Issues and Insights

Invisible price competition in lipsticks

The facts

The implications

Figure 10: Red Earth lipstick matches & Bobbi Brown mini lipstick collection, US and China, 2018

Figure 11: Carslan x Pantone Lipstick colour - living coral, China, 2019

Figure 12: Products with empowering claim, US, 2018-19

Building the new nude look

The facts

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Colour Cosmetics - China - June 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The implications

Figure 13: Examples of obvious skin caring add-ins to face base make-up, China, Japan, and South Korea, 2018-19

Figure 14: Giorgio Armani new launches in blush, highlighter, contour with natural claim, China, 2019

Figure 15: Dior healthy glow blush, China, 2019

Enhance the adoption of eye shadow palette

The facts

The implications

Figure 16: YES!IC Poster on Tmall, China, 2019

The Market – What You Need to Know

Near RMB40 billion market value of China colour cosmetics

KOLs and online/offline hybridised channels support the growth

Lip segment still leads the market but eye segment is catching up

Market Size and Forecast

Sustained strong growth

Figure 17: Total value sales of the colour cosmetics market and overall BPC, China, 2016-19 (est)

Figure 18: Best- and worst-case forecast of total value sales of colour cosmetics market, China, 2014-24

Market Drivers

Online channels offer wide reach for brands

Seamless online purchase experience helps brands thrive

KOLs shorten review-oriented consumers' purchase cycle

Figure 19: Watsons x Li Jiaqi OMG list online and offline, China, April 2019

Budget brands support volume growth

Offline engagement still crucial

Figure 20: Xiaohongshu experiential store in Shanghai, China

Figure 21: Layouts of YES!IC and Perfect Diary offline stores, China, 2018-19

Market Segmentation

Largest face segment grows steady

Figure 22: Sales value and annual value growth rate of colour cosmetics market, by segment, China, 2017-18

Fast growing lip segment

Eye segment is booming

Iconic brands lead premiumisation in nail segment

Figure 23: Nail polish products, Larme de siréne and Little Ondine, China

Key Players – What You Need to Know

Premium and domestic brands both thriving

A year of brand crossovers

Caring benefits have potential across categories

Market Share

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Colour Cosmetics - China - June 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Premium brands support international giants' growth

Figure 24: Leading manufacturers' share of value sales of colour cosmetics market, China, 2017-18

Figure 25: Examples of popular products from L'Oréal, China, 2018

Figure 26: Examples of popular products from LVMH, China, 2018

Emerging domestic brands smothering imported mass brands

Marie Dalgar – brings calming and comforting sensations to make up process

Figure 27: YES!IC product design focusing on 'comforting', China, 2018

CHIOTURE – price challenger for premium lipsticks

Online sales boost more domestic online brands

Figure 28: Top 10 brands by online* values sales of colour cosmetics – face, China, 2018

Figure 29: Top 10 brands by online* values sales of colour cosmetics – lip, China, 2018

Figure 30: Top 10 brands by online* values sales of colour cosmetics – eye/eyebrow, China, 2018

Competitive Strategies

Impressive brand crossovers to stay top of mind

Figure 31: Marie Dalgar x Heineken, China, 2019

Figure 32: M.A.C x Wangzherongyao lipsticks, China, 2019

Cultural collaborations

Figure 33: Examples of cultural crossovers, China, 2018

Figure 34: HENODE Glamour 90's eye shadow palette, China, 2018

Enhancing offline services to boost professionalism

Figure 35: M.A.C Make-up Services, 2019

Who's Innovating?

Foundations grasp growing share against rising lip and eye colours

Figure 36: New launches of colour cosmetics, by sub-category, China, 2017-18

New patterns of lipsticks to fight against colour homogenisation

Figure 37: New launches of lip colour, by launch types, China, 2016-18

Figure 38: Change in patterns and glitters to differentiate, China and US, 2018-19

Lip colour with protection

Figure 39: Examples of lip colours with protection elements, France, Japan, and US, 2019

Lip colour with premium lip caring features

Figure 40: Examples of lip colours with lip caring claims, China and Brazil, 2019

Playful new formats of eye colours with eyelid caring benefits

Figure 41: Gel and jelly format eye-colour products, China and US, 2018-19

Figure 42: Innovations in helping a fuss free application, South Korea and US, 2018-19

Figure 43: Mascara designed for multiple tasks, UK and South Korea, 2018-19

More skincare benefits in face make-up

Figure 44: Examples of face make-up with skin caring benefits, South Korea, US, and UK, 2018

Playfulness and aromatherapy claims to bring more emotional values

Figure 45: Guerlain Glow powder with fragrance featuring, China, 2019

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Colour Cosmetics - China - June 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

New application sensation – Feels invisible

Figure 46: Shiseido 'visible feels invisible' series, China, 2019

The Consumer – What You Need to Know

Demolishing adoption gap between age groups and city tiers

Similar product usage picture but cushions face bottleneck

Foundations hold the golden ticket to premiumisation

Product review-oriented consumers view trends rationally

Performance and caring features both expected for base make-up

Consumers tend to have a wide inventory coverage

Use of Make-up

Fast rising adoption among 30-somethings

Figure 47: Rate of make-up application, by age, 2017 vs 2019

20-24 year olds seek occasions

Figure 48: Make-up habits, by age, February 2019

Figure 49: Example of promotions encouraging more applicable occasions, China, 2019

Figure 50: VENUS MARBLE new eye shadow palettes splitting occasions into two palettes, China, 2019

Helping 20-24s master techniques

Figure 51: Confidence with make-up skills, by age, February 2019

Tier two or lower cities are catching up

Figure 52: Rate of make-up application, by city tier, 2017 vs 2019

Product Usage

Most popular products are in line with expectations

Figure 53: Colour cosmetics used in the last six months, February 2019

The gap between lipstick and lip gloss is similar to last year

Figure 54: Giorgio Armani offers different formats for lip colour #400, China, 2019

Figure 55: Lipstick and lip gloss used in the last six months, by age, 2018 vs 2019

Eye shadow palette remains appealing to 29% of respondents

Figure 56: Eye shadow palette used in the last six months, by selected demographics, February 2019

Cushion BB/CC cream experience bottleneck as early 20s switch

Figure 57: Face colour cosmetics used in the last six months, by age, China, February 2019

Figure 58: Examples of fix spray with illuminating factor, US and China, 2018

20-24 year olds in lower tier cities show enthusiasm for make-up

Figure 59: Number of colour cosmetics used in the last six months, by age and city tier, February 2019

Price Range

Most consumers spend less than RMB300 per item

Figure 60: Price ranges, by product, February 2019

Lipsticks RMB100-300 essential across income levels and ages

Figure 61: Price ranges of lipsticks, by monthly personal income, February 2019

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Colour Cosmetics - China - June 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 62: Price ranges of lipsticks, by age, February 2019

Colour-led eye colour palettes for quick fashion items

Figure 63: Price ranges of eye shadow palette, by age, February 2019

Figure 64: SHU UEMURA limited edition eye shadow palette with fashion runway association, China, 2019

Foundations have more room for premiumisation than cushions

Figure 65: Price ranges of foundation and cushion BB/CC cream, by monthly personal income, February 2019

Figure 66: Cushion and foundation products usage, by age, February 2019

Consideration Factors

Consumers trust product reviews

Figure 67: Consideration factors for purchasing colour cosmetics, February 2019

Products should enhance value to justify their prices

Low product loyalty and experimental

Prudent considerations drive purchase even for trendy make-up

Figure 68: Consideration factors for purchasing lipstick, by age, February 2019

Figure 69: Consideration factors for purchasing eye shadow palette, by age, February 2019

Cushions as an easy to use add-on to foundations

Figure 70: Gap of consideration factor for purchasing cushion BB/CC cream and foundation (as benchmark), February 2019

Important Product Features of Face Base Make-up

Consumers desire superior functionalities and skin benefits

Figure 71: Important product features of face base make-up, February 2019

Younger consumers expect professional products to cover up their problems

Figure 72: TURF Analysis of important product features of face base make-up -, 20-29 yrs, February 2019

Figure 73: Gap of important product features for face base make-up, between 20-24 yrs and total (as benchmark), between 25-29 yrs and total (as benchmark), China, February 2019

Figure 74: Base make-up specifically targeting young consumers, China and Japan, 2018

Older groups want caring products to fix their problems

Figure 75: TURF Analysis of important product features of face base make-up, 30-49 yrs, February 2019

Figure 76: Guerlain L'Essentiel natural glow foundation, UK, 2019

Build an anti-pollution face base make-up

Figure 77: Examples of anti-pollution face base products, US and South Korea, 2019

Make-up Attitudes and Habits

Make-up habits gap narrows between city tiers

Figure 78: Make-up habits - 'I wear make-up almost every day', by city tier, February 2019

Occasional users also have full make-up drawers

Figure 79: Colour cosmetics used in the last six months, by make-up habits, February 2019

Delicate look emerging among 20 year olds

Figure 80: Look preference, 2017 vs 2019

Figure 81: Look preference - 'I prefer to have a delicate finish', by age, 2019 vs 17

Figure 82: Example of niche products with easy to use design, South Korea, US and China, 2018-19

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Colour Cosmetics - China - June 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Niche products also essential for nude look seekers

Figure 83: Product usage, by look preference, February 2019

Half of consumers prefer dedicated products

Figure 84: Product preference, February 2019

Figure 85: Product preference – 'I prefer using specific products for each make-up step when applying make-up, by selected demographics, February 2019

Make-up skills limit trend seekers

Figure 86: Make-up style preference and skill confidence, February 2019

Figure 87: Make-up style preference, by skill confidence, February 2019

Make daily-application colours trendy

Figure 88: Attitude towards trends, February 2019

Figure 89: Example of scheming glitters sparks in low key eye make-up looks, China, 2019

Meet the Mintropolitans

Mintropolitans shows less interest in cushions

Figure 90: Colour cosmetics used in the last six months, by consumer classification, February 2019

Mintropolitans show greatest interest in skin caring bases

Figure 91: Important product features of face base make-up, by consumer classification, February 2019

Mintropolitans also enjoy value-for-money eye shadow palettes

Figure 92: Price ranges of products – spend more than RMB200 per item, by consumer classification, February 2019

Contradiction between trendy products and daily application

Figure 93: Make-up style preference and skill confidence, by consumer classification, February 2019

Appendix – Market Size and Forecast

Figure 94: Market value of colour cosmetics, China, 2014-2024

Appendix – Market Segmentation

Figure 95: Value sales of colour cosmetics market, by segment, China, 2014-18

Figure 96: Value share of colour cosmetics market, by segment, China, 2014-18

Figure 97: Annual value growth rate of colour cosmetics market, by segment, China, 2014-18

Appendix – Methodology and Abbreviations

Methodology

Fan chart forecast

Abbreviations

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com