



1st Edition

Digitally Native Beauty in China: Brand Monitor

To be Published 2nd Quarter 2020
Base Year: 2019

Regional Coverage: China

Independent beauty brands, also called indies, are the most sought-after brands by cosmetics marketers and retailers alike. Digitally native brands, often indies themselves, are the newest industry disruptors. Emerging with a flare for consumer experience and control over their own distribution, these brands are often found on Tmall, JD, and Xiaohongshu.com. Our monitor will identify these disruptors and assess the factors that make them resonate with consumers including positioning, product assortment, marketing activity, and Internet platform selection.

Our report will answer the following questions about digitally native brands in China:

- What marketing strategies do these digitally native brands use to differentiate themselves?
- Which product categories do these indies dominate?
- Who are the most influential key opinion leaders in this space, and what roles do they play in making these brands a success?



Tentative Report Contents*

Executive Summary

- Role of digital natives in the Chinese beauty market
- Lessons learned
- Key success factors
- Common strategies
- Future outlook

Brand Profiles

Brand profiles of 20 select brands (see Table 1) that will include the following:

- Brand equity and positioning
- Company overview and profile of founders
- Description of product portfolio and pricing
- Hero product
- Marketing activity – focus on digital influencer/ KOL strategy
- Go-to market strategy
- Retail distribution and expansion strategies
- Brand sales for 2019

* Subject to charter subscriber input

Table 1. Illustrative List of Select Brands to be Profiled*

Adolph

Amy

Dora Dosu

Dreamtimes

Florasis

Helius

Judydoll

Little Dream Garden

Lucenbase

MayCreate

Meiking

Nattitude

Ouliyong

Toumi

VNK

* Pre-launch subscribers will be able to give input on brand selection for this report.





Scope

Digitally Native Beauty in China: Brand Monitor will identify and profile 20 brands that we consider to be industry disruptors.

- Geographically, our research will focus on China.
- The category scope will encompass all beauty and personal care products, with a focus on makeup and skin care.
- The channel scope will be those brands born on the Internet.

Key Benefits

This report will provide pertinent information on the most compelling indie brands that are helping to shape today's beauty industry in China. While these brands may be small in terms of sales value today, they have the potential to become tomorrow's multi-million dollar brands.

- A view of the independent brands that are outpacing beauty industry growth in the categories in which they compete
- An understanding of which products and concepts resonate with today's Chinese consumers
- The identification of concepts that may have traction in other parts of the world



Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 60 years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

Primary Research

We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Marketers/manufacturers
- Distributors
- Government agencies
- Retailers
- Suppliers
- Trade organizations

Secondary Research

We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/ industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

Comprehensive Market Intelligence

We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for 60 years.

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North America
+1-973-435-3407

Latin America
+55-11-3079-0792

Europe
+32-2-770-4740

China
+86-21-6012-6500

India
+91-124-4546-100

Japan
+81-3-3242-6277