



Beauty Retailing China:

Analysis and Opportunities in the Direct Sales and Specialty Stores Channels

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Base Year: 2018

Forecasts to 2023

Regional Coverage: China

A robust analysis of the ever-changing environment for retailing cosmetics and toiletries in the direct and specialty store channels in China. With insightful channel and retailer profiles, our analysis provides a clear view of the retail landscape specific to beauty and personal care products for the important Chinese market.

This Report Helps Subscribers Understand

- What are some of the fresh, new beauty retail formats that launched/expanded?
- What are brick-and-mortar stores doing to attract consumers into their specialty stores and create an omni-channel approach?
- Who are up-and-coming direct and specialty retailers?
- How is technology infusing new interest in the shopping experience at physical beauty stores?



Report Contents

Introduction

Executive Summary

- Key takeaways
- Channel developments
- Data highlights for 2017 and 2018
- Snapshots of leading channel players
- Outlook and assessment

Purchase Channel Profiles

Detailed analysis of each purchase channel and sub-channel as shown in Table 1. The cosmetics and toiletries categories covered are listed in Table 2. Information includes the following:

- Channel developments
- Analysis by store type/subclass
- Leading retailers
- Marketing and promotional activity
- Outlook to 2023

Retailer Profiles

Profiles of 10 retailers as listed in Table 3 are provided with specific discussions relating to the beauty business of these companies, including the following information:

- Overview
- Sales
- Recent developments
- Cosmetics and toiletry sales in 2017 and 2018
- Cosmetics assortment and key brands offered
- Marketing activity
- Outlook 2023





Table 1: Purchase Channels to be Covered

Channel	Sub-channel
Direct sales	Person-to-person (Avon)
	E-commerce/mobile commerce (Infinitus, TMall)
Specialty stores	Cosmetics specialty stores (Sephora, Gialen)
	Vertically integrated stores (L'Occitane, The Face Shop)

Table 2: Product Class Coverage

Product class	What is included
Fragrances	Fragrances for men
	Fragrances for women
Hair care	Shampoos and conditioners
	Hair coloring products
	Hair styling products and sprays
Makeup	Eye makeup
	Face makeup
	Lipsticks and lip glosses
	Nail polishes
Skin care	Facial skin care
	Hand and body lotions
	Sun care products
	Personal cleansing products

Table 3: Select Examples of Retailers Profiled

- Dr. Plant
- Gialen
- Infinitus
- Innisfree
- L'Occitane
- MaryKay
- Oriental
- Sephora
- Tmall
- VIP



Scope

Beauty Retailing China: Analysis and Opportunities in the Direct Sales and Specialty Stores Channels provides subscribers with insights into the dynamically growing direct sales and specialty stores channels. The report focuses on the beauty and personal care market.

- Category scope mirrors Kline's Cosmetics & Toiletries USA program, encompassing four product classes—fragrances, hair care, makeup, and skin care
- Reporting at the retail and manufacturers' sales level
- Coverage of mainland China

Key Benefits

This comprehensive report enables subscribers to exploit business opportunities by illustrating the retailing dynamics in one of the most important markets of the personal care industry.

- Delivers the information and insights required to capitalize on changes and shifts taking place in terms of store formats and expansions
- Explains the business practices and strategies of specific types of retailers, supported by profiles of key cosmetics and toiletries direct and specialty retailers, as well as up-and-coming ones
- Includes one day of consultation time with members of the research team, which can be used for assistance with expansion plans or to explore information related to the industry.
- Identifies and explains the two channels in a clear and consistent fashion



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 50-plus 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:

- Retailers – at both a corporate level and store level
- Store managers and sales associates
- Marketers/manufacturers
- Distributors
- Government agencies
- 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 over 50 years.

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