Vogue Business Chinese Beauty Watchlist

In Partnership with S'Young International

VOGUE BUSINESS

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Abstract

Within the beauty industry, China is an increasingly important market for international brands to crack, due to the country's increasing wealth and urbanisation. Expansion into China, however, brings both logistical and cultural challenges, and many brands therefore opt to enter the market through cross-border channels. To explore this, *Vogue Business* has partnered with S'Young International, an international digital-driven platform for global beauty brands to grow sustainably in China, to create our inaugural Chinese Beauty Watchlist. This study aims to highlight the up-and-coming international beauty brands in China through their performance in digital, omnichannel and ESG metrics, as well as defining key trends across skincare, makeup, fragrance and personal care.

As young Chinese consumers increasingly seek a sense of individualism, inclusion and a premium lifestyle, this paves the way for niche and small beauty brands that mirror these values to thrive. While growing from a smaller base, these brands are leap-frogging through stages of development to innovate at a fast rate, tapping into consumer trends and adapting to the local market through engagement with cultural events, shopping events and local celebrities and KOLs. With the right mix of investment, brand communication and product development these brands stand to become fierce beauty competitors beyond their domestic market.

Methodology

The *Vogue Business* Chinese Beauty Watchlist assesses twenty cosmetics and skincare brands in China. Brands were selected for analysis based on editorial expertise and consultation with industry insiders, with each brand facing robust assessment across digital, omnichannel and ESG performance. Some brands are more established in the market, while others are scaling rapidly and, in some cases, already outperforming against the industry average for several metrics. To create this watchlist, the *Vogue Business* data and insights team measured the performance of brands against a range of criteria. The weighting of each pillar — digital, omnichannel and ESG — and a summary of the criteria analysed, is outlined in the table.

This methodology is designed to provide an overview of each brand's performance and growth potential, based on a comprehensive audit using both first and third-party data. The data was collected over a three month period, from August 2022 to October 2022. For most metrics across digital and omnichannel, historical data was captured for the six months up to September 2022. For the remaining metrics, a point-in-time audit was conducted across brand sites and digital platforms. This relates largely to service offerings and ESG. In some cases, scores reflect a brand's strategic decision not to establish a presence on specific platforms. For example, several of the brands have yet to establish a significant presence on Wechat. Therefore, this study measures brands based on what they have done to cultivate engagement so far, while also exposing areas for improvement.

For each pillar, brands are indexed to the top performer for that area. For example, EviDenS de Beauté attained the highest score for digital performance, and therefore represents the 100% mark in this pillar. All other brands are indexed in relation to EviDenS de Beauté in the digital pillar. This does not mean that EviDenS de Beauté met all of the criteria we assessed within the pillar; simply that it achieved the highest score of all the brands in this area.

As the first *Vogue Business* Chinese Beauty Watchlist produced by the *Vogue Business* data and insights team, we expect to refine and update the methodology to account for industry developments in any future editions. This study should be used to provide a benchmark for industry performance in the beauty and cosmetics space from this cross-section of brands. The data and insights within the study should not be used, cited, or understood out of this context.

Digital: 45%	Omnichannel: 40%	ESG: 15%
• Social media engagement: including followers, likes, posts, views, shares and comments. • Digital platform search volume. • Platforms assessed: Wechat, Weibo, Xiaohongshu, Baidu (search volume over six months), Bytedance (search volume over six months).	• Tmall presence and features: including number of Tmall stores, followers and review scores (1-5). • Service offerings: including live chat, loyalty programmes, gift card availability, trading in local currency, live streaming.	**Environmental criteria:** • Use of recycled packaging or policies on reduction of waste and plastic. • Use of certified organic ingredients. • Vegan/cruelty-free manufacturing processes. • Energy and emissions reduction. **Social impact criteria:** • Equal opportunities. • Diversity and inclusion policies and figures. • Product localisation (creating products for Asian skin types). • Local collaboration / use of creative talent.

Beauty trends in the Chinese market

01.

Skincare trends

The skincare industry has seen significant changes in recent years, as skincare philosophies and needs of consumers have evolved, particularly during the Covid-19 pandemic.

Chinese skincare consumers are becoming more sophisticated when it comes to choosing appropriate products. Long-term mask wearing, for instance, has sparked more attention to skin maintenance, given that some studies have found that it could affect wrinkles, pores, acnes and higher levels of skin sensitivity.

There is also increased awareness of anti-pollution and environmentally-friendly products; greater interest in ingredient transparency; and due to more time spent at home during lockdowns, consumers are researching products and options more deeply and enjoying the leisure time of skincare routines.

Skincare Trend 1
Sustainable and organic skincare

Consumers are becoming increasingly aware of the importance of protecting the environment and are willing to take action to support it with green and low-carbon choices. Clean, green, organic, sustainable and vegan beauty are all emerging in consumers' brand and product choices as 'sustainable consumption' grows in popularity.

In May 2022, Kantar Consulting released a report 'Sustainability Basics in China', which found that 80 per cent of consumers think purchasing sustainable products is a way to build their eco-friendly, sustainable personal image; 50 per cent say they are ready to support companies that promote sustainability with time and money.

'Sustainable skincare' became a popular consumer trend during the 618 Shopping Festival. JD.com, a leading e-commerce platform in China, released data showing that during 618 this year, in beauty and personal care categories, products labelled with 'organic', 'natural' and 'healthy' ingredients, achieved significant sales growth.

Skincare Trend 2
Efficacy-driven with ingredient science

Younger consumers are becoming more 'science-minded' when it comes to skincare. In 2021, the volume and searches related to the 'precise function' of skincare products on Douyin (China's TikTok) increased, as more Chinese beauty consumers have taken an interest in self-learning around scientific skincare knowledge and product ingredients.

The new generation of efficacy-oriented, 'ingredient seekers' do not blindly follow the mainstream. When selecting products, they no longer put halos on authoritative lists or star products by big name brands, but dig deeper into the ingredients and research efforts behind the brands. This shift in consumer behaviour is also stimulating domestic and international brands to make progress in original ingredient patents, self-developed technology and innovation; and related content continues to gain attention on Douyin (China's TikTok).

Seeking to avoid the one-size-fits-all products, beyond ingredient-led consumers are the 'formula seekers', no longer focusing on a single perspective such as the ingredients and concentration, and instead paying attention to whether the ratio of ingredients is reasonable and synergistic.

Skincare Trend 3
Aesthetic emotions and rituals

Beauty brands and products that open up emotional pathways with scent, colour, texture and ritualistic tools and steps to, for instance, release stress, are increasingly sought after by beauty consumers. Closely related to 'emotional aesthetics' — emotions that are felt during aesthetic activity or appreciation — the ritual of applying skincare has now extended to also become a mental experience as well as a physical one. 8.28 billion views of the hashtag #immersiveskincare on Douyin, the sounds of opening and closing bottles, peeling off masks, face tapping and turning on the tap throughout the process makes skincare a ritualistic self-healing experience.

This trend echoes the concept of the "skincare pyramid" put forward by a leading beauty KOL (key opinion leader, aka influencer) Wangyu Luo from Douyin. He divides skincare products into four levels, pointing out that most of the products are "healthy" and "good-looking", but if they want to move up in the hierarchy, they need to work on packaging, scent and texture to build a pleasurable sensorial experience.

Beauty trends in the Chinese market

02.
Makeup trends

With the pandemic and related restrictions, there has been a significant slowdown in the growth of the Chinese cosmetics market, as consumers' usage scenarios, frequency and purchase desire for cosmetics has diminished due to staying at home. However, as restrictions have lifted in some areas, consumer demand is ushering in a rebound, in part fuelled by short-term 'retaliatory consumption' (a term coined in Asia concerning the compensatory shopping after Covid, leading to some consumers overspending).

The cosmetics industry is evolving quickly, and the market in China has experienced a series of major developments in recent years: many domestic cosmetics brands have obtained financing, overseas brands have entered the Chinese market, and bricks-and-mortar stores continue to innovate, promoting the development of China's cosmetics market.

By applying the dynamic lens of consumer needs, we see a moving trend towards people using makeup to experiment with their concept of self. Whether in pursuit of individualism or a premium lifestyle, consumers are seeking personalisation and custom-made products, which allow them to feel unique and their individual skin type catered for.

Makeup Trend 1
High-end custom-made

Chinese consumers' pursuit of a premium lifestyle has become increasingly important and has been reflected in different aspects of life. In makeup, they prefer it to be customised and personalised to better work with their individual skin type and colour, as well as facial features.

For instance, lipstick recommendations on social media are no longer based on the colour itself, and are now more commonly recommended to match skin tone or natural lip colour — the hashtag #LipsticksPerfectForAsianSkin has, so far, had 37 million views on social and e-commerce platform Xiaohongshu (as of mid-October 2022).

The application of makeup is also seeing refinement in the use of different foundations and primers for different parts of the face based on the various skin textures. Several professional backstage makeup brands, including Natasha Denona, Urban Decay and Nars have developed eyeshadow bases to better fit the skin around the eye area for more effective application.

Makeup Trend 2
Makeup as skincare

Consumers have been eager to extend their skincare needs into purchase decisions around makeup. Makeup products are increasingly expected to have the efficacy of skincare, such as hydrating, firming, brightening, even anti-ageing, and so on.

In 2021, sales of skin-nourishing foundations saw an 86.7 per cent year-on-year growth, according to the BioHope 2021 Makeup Trends report. In particular, those with naturally extracted ingredients were the most popular. For example, Zelens Age Control Foundation has a formula with green shiso leaves and eight kinds of amino acids, providing all-day moisture enhancement while adding luminosity to the skin.

Makeup Trend 3
Curiosity and playfulness

Makeup is a category that naturally carries the feeling of beauty, joy and self-expression. Young Chinese consumers often like to try new things, particularly in terms of cosmetics. Some makeup brands are providing online tutorials to teach consumers how to recreate makeup trends at home with their products; alongside the brands collaborating with KOLs who live stream as part of this new sales channel.

Beyond the makeup itself, this often means the product needs to be playful and intriguing in terms of branding, packaging or marketing, to arouse consumers' curiosity to explore further. This often extends to in-store decor and visual displays changing frequently to provide immersive and novel shopping experiences.

Beauty trends in the Chinese market

03.
Fragrance trends

Fragrance can be both an expression of personality, and a powerful emotional healer.

The 2021 Chinese Fragrance Industry Research White Paper by Kantar Consulting points out that the 'perfume effect' is largely now replacing the 'lipstick effect'. This relates to the 'lipstick index', first coined by Leonard Lauder, chairman of Estée Lauder, during the 2001 recession. The concept suggests sales of affordable luxuries rise during economic downturns, for instance, a small indulgence such as a lipstick may be purchased to uplift mood.

Since the pandemic, however, wearing masks has become a daily routine in China, and the demand for lipstick has been greatly reduced. Instead, fragrance has become an important category for consumers to improve their happiness level, becoming the 'urban upstart' of beauty cosmetics consumption, with China's fragrance market expected to exceed RMB 30 billion (£3.66 billion) by 2025, per Kantar.

At the same time, China's Gen Z, who pursue individuality and uniqueness, are seeking out high-end niche perfumes. This has ushered in a good development opportunity, with an increasing number of international fragrance brands entering the China market in recent years.

Fragrance Trend 1
Overseas niche brands on the rise

Fragrance is an elevated beauty expression compared to makeup in China. iResearch data shows 57.4 per cent of Chinese fragrance users believe it is an expression of their personal vibe and taste — therefore, choice of scent is closely related to self-image.

Younger generations who are striving to stand out and appear innovative, have shown a high demand for niche and unique scents: 72.9 per cent of fragrance consumers under their thirties from Tier 1 cities are advocates of niche brands, with this mainly reflected in the popularity of unisex perfumes. Compared to traditional feminine fragrances — sweet, fruity or floral, for instance — refreshing and premium unisex scents are preferred by an increasing number of female consumers. They define niche fragrances as "salon fragrances" that are "less likely to smell alike" and are "uncommon in the domestic market". Moreover, this interest in niche fragrances continues to grow among fragrance consumers of other generations and regions.

Imported niche fragrance brands have been increasingly present in China over the past three years, with JD Data showing around 20 niche perfume brands from France, Italy, UK, and other countries participated in the 618 Shopping Festival for the first time this year.

Fragrance Trend 2
Personalisation

In order to provide consumers with a more personalised experience, some luxury fragrance brands have begun to move towards multiplication and customisation. In early 2021, Louis Vuitton launched a high-end fragrance ultra-personalisation service, in collaboration with master perfumer Jacques Cavallier-Belletrud, in perfume capital Grasse, France. After an in-depth conversation with him — covering individual likes and tastes, favourite memories and foods, everyday lifestyle choices, current perfume preferences, and so on — a formula is created based on these answers. A year later, a fully customised luxury fragrance will be delivered to the consumer.

Also new to Chinese fragrance consumers is the concept of layering scents. In 2021, Bulgari launched Allegra collection, enabling the multiplication of perfume, providing possibilities for layering and combining fragrances together. Starting with a choice of base fragrance, consumers then can create their own signature by adding other essences.

PHOTO: AMOUAGE

Beauty trends in the Chinese market

04.

Personal care trends

Personal care in China is an expanding market with extending categories. The body care market in China has exceeded MB 8 billion (£930 million), according to research by CBNData. However, body care products account for only about 5 per cent of overall skincare here, showing body care has potential for development. In terms of direction, establishing a brand that meets domestic needs; recognising the driving force of consumers purchase; and optimising the purchase channels are the three key aspects contributing to an increasing market share of products.

When it comes to haircare, today's consumers know this means more than just shampoo and conditioner. According to iResearch, 48.2 per cent of respondents from Tier 1,2 and 3 cities said they were using hair care oils. In addition, scalp cleansing products, hair growth lotions, hair sprays, and other products are also being used. An increasing number of products are gradually entering daily haircare routines. Consumers' increasing their spending on haircare products has also become a trend.

Personalcare Trend 1
Natural ingredients, naturally loved

With Chinese consumers becoming more aware of the concept of green and sustainable consumption, the desire for organic ingredients in personal care products is also gaining popularity. Search volume for 'pure natural hair dye' in online haircare-related search terms is significant. Among scalp care products, the sales of ginger products far exceeded that of sea salt, which ranked second, by nearly three times. In addition, argan oil, caviar haircare oil, and other high luxury extracts from natural resources are also increasingly popular among consumers.

Love for sustainable brands continues. In addition to the preference for natural ingredients, more than 80 per cent of consumers have increased their purchase intent for sustainable brands (June 2021 to May 2022) and are willing to pay a maximum 20 per cent cost premium for eco-friendly and sustainable formulas, according to TMIC 2022 High-end Haircare Consumption Trends Whitepaper. Body care and haircare brands tend to highlight the green technology and sustainable manufacturing used by the brand in their official Tmall stores (the Chinese e-commerce platform), displaying a brand attitude of concern for nature.

Personalcare Trend 2
In-home salon, deluxe experience

In an era of pandemic lockdowns, an increasing number of consumers are choosing salon-level haircare brands for DIY hair treatments at home: on both Douyin and Xiaohongshu platforms, the "Aluminium Foil Hair Care Method", occupies the top-liked videos under haircare topics. The money saved from going to a salon is being used on higher-end haircare products. One video shared by a makeup artist on Xiaohongshu received 170,000 likes, with the majority of questions beneath asking about the high-end hair mask, hair oil, hair dryer, and heated hair comb used in the video.

At a time when home haircare products become salon competitors, the sales of high-end hair care products in Tmall International and JD.com, two major Chinese e-commerce platforms, continue to be high — particularly specialised haircare brands such as Kerastase and Rene Furterer, which account for nine of the top 10 premium hair-beauty products in sales on Tmall, according to the company.

Personalcare Trend 3
'He-Economy' as a blue ocean

From clothing and shoes to personal care, men are increasing their spend on their own appearance, and the overall consumption of men's shampoo, men's hair styling products, and men's toiletries kits have all increased, according to the 2022 Men's Care Trends Insight Report by big data agency Qingqu Data. In the movie *B for Busy* (爱情神话), a moment in the plot sees the son (played by Huang Minghao) quarrel over a hand cream with his father (Xu Zheng), reflecting the intergenerational differences in men's body care.

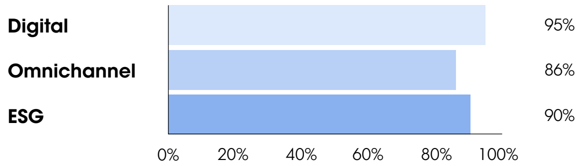
Per a 2021 social media report about the body care industry by big data agency Guoji Data, men's personal care has become the second fastest growing category on Douyin and Kuaishou, two of the leading short-form video platforms in China. While Chando and Clear are expanding their product lines to remain the leading players in men's personal care in China, new entries such as Sidekick are also entering this promising market.

Top 20

Index score

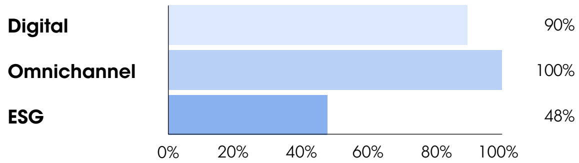
1
Hourglass **90**

Hourglass holds the top spot in the *Vogue Business* Chinese Beauty Watchlist thanks to the brand's impressive performance in digital search data. Success has been supported by owner Unilever's knowledge of the Chinese market, with the company reporting 36 per cent of its turnover in 2021 derived from the US, India and China, and strong environmental, social, and governance (ESG) reporting from the company, evidenced particularly in labour equality and local adaptation. The prestige nature of the brand further ties into Chinese consumers' desire for luxury makeup.



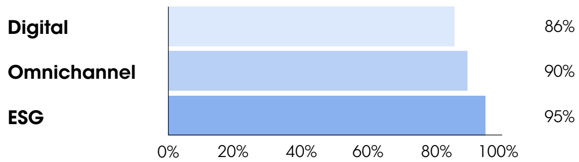
2
Zelens **89**

Zelens is the top player in the omnichannel pillar, with a strong Tmall presence and a wide range of services including the use of live streaming. Zelens appeals to China's efficacy-driven skincare consumer through its "vitamin alphabet", which utilises various vitamins to target specific consumer concerns. Created by Dr Marko Lens, it gains brand authority through his medical expertise in skin aging.



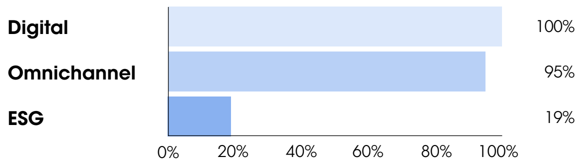
3
Aesop **88**

Aesop shows consistent performance across all three pillars of digital, omnichannel and ESG. Search volume on Xiaohongshu (social and e-commerce platform) and Baidu (search engine) is particularly high for the brand. It is also owned by B-Corp, Natura &Co. Aesop's recent focus on the fragrance category ties into demand from Chinese consumers for niche overseas brands, while the apothecary-style unisex packaging helps the brand appeal to younger consumers.



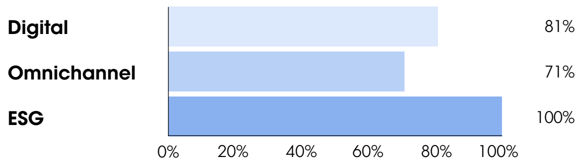
4
EviDenS de Beauté **84**

EviDenS de Beauté is leading the digital pillar thanks to the brand's impressive performance on social platforms such as Wechat and Weibo, and is also robust in the omnichannel pillar. The brand holds a sense of ceremony at its core, through its partnerships with spas, appealing to sensorial- and wellness-driven consumers. Meanwhile its ESG reporting shows room for improvement in order to attract China's increasingly sustainable audience.



5
Fenty Beauty **80**

Fenty Beauty is the top performing brand for ESG, with its digital score boosted by strong engagement on Xiaohongshu. Pioneering inclusive shade ranges, it does well in terms of local adaptation, as well as partnering with KOLs (key opinion leaders, aka influencers) and running campaigns for the Chinese Qixi festival on their social platforms. Fenty Beauty is also exploring makeup as skincare, with the brands primer and glow enhancer products including ingredients such as grape seed oil and prickly pear extract for hydration.

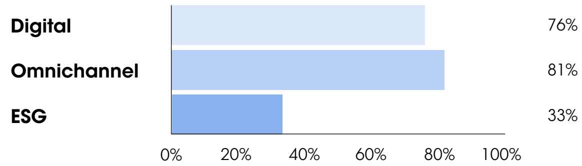


All scores based out of 100. Each metric is assessed individually and later combined.

Index score

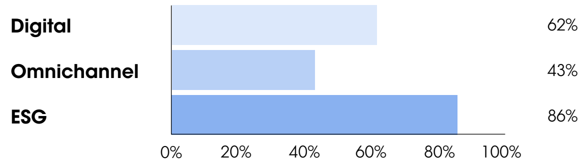
6
Byredo **65**

Byredo performs well on Tmall, with its multi-category nature appealing to consumers on multiple fronts. The brand is led by niche and unisex fragrance, and recently experimented with "digital auras" in the metaverse, in partnership with Rtfkt, which allows for customisation. Their 2020 expansion into makeup saw them adopt a playful approach to packaging, making each into a "design object".



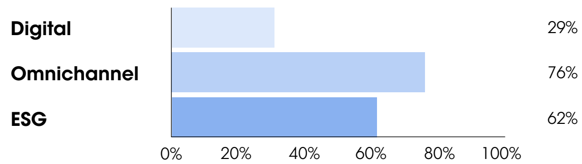
7
Juice Beauty **47**

Juice Beauty is a strong contender in ESG for a brand of its size, with this boosting the brand to eighth position. Its use of sustainable materials and renewable energy is well communicated, making the brand popular with sustainable skincare consumers; while its makeup range uses "phyto-pigments", said to provide skincare benefits such as illuminating the skin and smoothing lines and wrinkles.



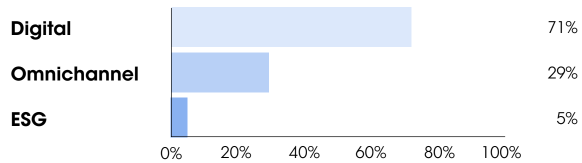
8
Eisenberg **46**

Eisenberg's score is boosted by its Tmall performance, with the brand being the fourth best performing brand of the *Vogue Business* Chinese Beauty Watchlist on Tmall. The brand stands out to efficacy-driven consumers with its transparency around ingredients and their properties and benefits.



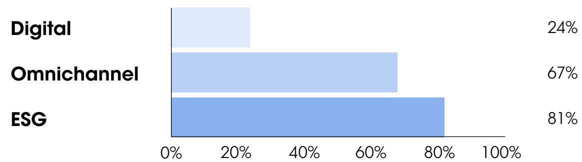
9
Hince **46**

Hince shows strong performance in the digital pillar, with this bolstered by its presence on Xiaohongshu. The brand adopts a "skin-first" approach with its Second Skin foundation formulated to be bright and breathable. Self-described as a "mood-narrative" brand, the makeup gives rise to self-expression through colour and playful formulas, such as its jelly-like nail polish.



10
Parissa **42**

Parissa sits in the top five for ESG, driven primarily by its use of materials. The use of natural wax appeals to the demands of personal care consumers, while the use of biodegradable cellophane, rewashable epilation strips and refillable wax pods appeals to increasingly sustainable consumer behaviour. The rise of DIY solutions further supports the hair removal brand, giving consumers a salon experience at home.



All scores based out of 100. Each metric is assessed individually and later combined.

		Index score	
11	**Memo Paris**	**42**	Memo Paris's score is strengthen by keyword traffic performance on Douyin (China's TikTok) and strong omnichannel services, including the use of live streaming. The brand's strengths in storytelling help it to overcome challenges faced by fragrance e-commerce (such as limits on testing) with the brand also selling books on its fragrance ranges.
12	**Revitalash**	**41**	Despite its niche position, Revitalash's score is boosted by its environmental policies and sustainable packaging. Revitalash offers consumers benefits beyond typical beauty products, in the form of hair growth, with the perceived efficacy of being created and run by a medical practitioner, CEO and founder Dr Michael Brinkenhoff.
13	**Lierac**	**40**	Lierac performs well in traditional online channels, including Baidu search volume and on Tmall. The brand appeals to efficacy-driven skincare skincare consumers and those looking for the use of natural ingredients, with the brand utilising botanical ingredients while still being a research-led brand.
14	**Cellex-C**	**34**	Cellex-C performs ahead of brands of a similar ranking in digital due to a good performance in Baidu search volume and Wechat engagement. The brand taps into ingredient-first skincare with a focus on vitamin c. It's also results-driven, visibly showing consumers the effects of Cellex-C on reducing wrinkles with before and after imagery.
15	**Amouage**	**33**	Amouage performs well in its local adaptation strategy, holding promotions for Chinese shopping seasons such as Singles' Day (Double 11). The brand taps into consumers' desire to use fragrance for self-expression with the brand utilising its high concentration 'Exceptional Extrait' formulation to allow for long-lasting unique scents.
16	**Jo Loves**	**28**	Jo Loves's strongest pillar is ESG, with refills a particular focus of the brand, for candles, body wash and shower gel. The brand is personality-led by Jo Malone, giving credibility and history to a young brand, while collaboration with Chinese singer Liu Lian helps it appeal to the Chinese market.
17	**Lord & Berry**	**28**	Lord & Berry performs well on digital platforms such as Xiaohongshu and Weibo thanks to the visual nature of the brand. The brand's makeup looks tie in with consumers seeking playfulness, often featuring bold colours, graphic liner and glitter.
18	**Natasha Denona**	**27**	Natasha Denona's score is bolstered by its Tmall performance and strong omnichannel result. Its best-selling eyeshadow palettes display a range of colourful shades tapping into Chinese consumer demand for joyful and expressive makeup, while Denona's experience as a makeup artist gives consumers the perception of quality.
19	**Ayuna**	**27**	Ayuna's strongest pillar is ESG, with the brand's recyclable ceramic Terra Bella packaging providing an attractive eco-friendly alternative. A focus on meditation ties the brand to emotional wellbeing, while its focus on mindful fragrance and the "skin-brain connection" appeals to consumers looking for sensorial and holistic skincare.
20	**DS Laboratories**	**25**	DS Laboratories holds a top 10 performance in ESG in the *Vogue Business* Chinese Beauty Watchlist, in part due to its use of oxo-biodegradable packaging as well as its local adaptation, engaging with Chinese shopping festivals such as 618. The brand's products are subject to clinical trials, appealing to efficacy-driven consumers.

All scores based out of 100. Each metric is assessed individually and later combined.

Ranking

Ranking	Brand	Index Score (out of 100)*	Dimension per cent rank		
			Digital	Omnichannel	ESG
1	Hourglass	90	95	86	90
2	Zelens	89	90	100	48
3	Aesop	88	86	90	95
4	EviDenS de Beauté	84	100	95	19
5	Fenty Beauty	80	81	71	100
6	Byredo	65	76	81	33
7	Juice Beauty	47	62	43	86
8	Eisenberg	46	29	76	62
9	Hince	46	71	29	5
10	Parissa	42	24	67	81
11	Memo Paris	42	57	48	38
12	Revitalash	41	67	14	76
13	Lierac	40	48	62	10
14	Cellex-C	34	52	38	0
15	Amouage	33	43	19	29
16	Jo Loves	28	14	24	52
17	Lord&Berry	28	38	10	67
18	Natasha Denona	27	10	57	24
19	Ayuna	27	33	5	57
20	DS Laboratories	25	19	0	71

Note: All scores based out of 100. Each metric is assessed individually and later combined.

PHOTO: AESOP

Brand case study
01 Aesop

1: Brand positioning

The minimalist labelling and iconic apothecary style dark bottles of Aesop are familiar to Chinese consumers. In addition to its well-known body care range, the company is extending its product line to fragrance and home, which is appealing to consumers looking for unique scents from international brands. The meticulously listed ingredients and sustainability credentials help boost the brand as intelligent, luxurious yet unpretentious. Almost utilitarian in design, the products offer a great opportunity to catch the he-economy, too.

2: Target users

Different from traditional skincare brands that are accustomed to using celebrity endorsement and KOL promotions to reach target groups, the distinguished philosophy of Aesop has attracted consumers that are more attuned to their values and cultures. Aesop likes to express its brand philosophy by sharing recommended book lists and curated playlists, as well as collaborating with artists and musicians such as Ahya Simone and Les Filles de Illighadad. The brand's B-Corp status appeals to environmentally-aware consumers, who connect with the brand's values and culture emotionally.

3: Star products

With its plant-based concept, Aesop has produced many of the best-known products in the natural skincare industry. One of its most popular products on Tmall, as well as seventh in the Tmall's ranking of hand creams, based on sales, is Resurrection Aromatique Hand Balm. The product's refreshing aroma comes from a blend of fragrant botanicals, including mandarin rind, rosemary leaf and cedar atlas, blended with skin-softening emollient to enhance efficacy. Another favourite, Geranium Leaf Hydrating Body Treatment, includes vitamin e and skin-softening nut oils to nourish and revive dry skin.

4: Recent news

Following its exhibition The Pleasure of Patience held in Li Garden from 2 to 26 November 2021, Aesop is returning to Shanghai once more. Thanks to imported cosmetics being exempt from China's animal testing requirements after 1 May 2021, the brand is opening its first two signature stores in mainland China, in Shanghai on Dongping Rd and Xintiandi. Along with the brand ethos, the shelves of perfectly aligned bottles and the comforting scent inside welcomes customers with a sense of peace and calm, establishing a moment of sanctuary in store.

PHOTO: AESOP

Brand case study
02 Fenty beauty

1: Brand positioning

Launched by Rihanna in 2017 and entering the Chinese market in 2019, Fenty Beauty positions itself as both Rihanna's personal brand and as an inclusive player within the beauty industry. While celebrity beauty brands are increasingly treated with scepticism from consumers and criticised as being a cash-in, Fenty Beauty has established itself as a beauty mainstay, with an innovative 40-shade foundation range. This has helped the brand in the Chinese market, while its "beauty for all" mantra also includes support for the LGBTQ+ community, such as sponsoring the ballroom event Voguing Shanghai in 2021.

2: Target users

Rihanna's celebrity status aligns the brand to a younger Gen Z audience interested in Western celebrity culture; although the brand has also focused on localisation by teaming up with Chinese celebrities such as Naomi Wang Ju and KOLs on social media, including blogger Lin Yun supporting the brand at its launch. The presence of the brand on Xiaohongshu, of which 66% of the platform's users are under the age of 35, according to data analytics firm Similarweb, attracts a digital-first consumer. In particular, Fenty targets aspirational consumers via content such as its glamping live stream from the coastal resort town of Aranya with Chinese singer Liu Lian.

3: Star products

While starting out as a cosmetics brand, Fenty Beauty has since expanded into skincare in 2020 and into fragrance in 2021. A move that is likely to have protected the brand against the impact of Covid-19 on the cosmetics category through diversification of its revenue. Known for its foundation and base products, its Match Stix Contour Skinstick is a bestseller in China supported by its suitability to a wide range of skin tones, with cool-toned products seen as suitable for Asian skin tones. Its Diamond Bomb All-Over Diamond Veil is another strong performer, with the 'diamond-like' sparkle giving consumers a playful glamorous look.

4: Recent news

Fenty Beauty collaborated with Tmall Global on their Beauty Bible 2022, cementing their place as a credible and authoritative voice in the Chinese beauty market, with the collaboration also helping to further promote the brand and its products. The brand has remained technologically relevant, with virtual try-on and online consultations being a core part of its global offering. It has also utilised live-stream shopping in China by inviting KOLs Tiffany Ding and Emma Tang onto their channel for the Singles Day shopping festival, tapping into entertainment as commerce.

PHOTO: FENTY BEAUTY

Brand case study
03 EviDenS de Beauté

1: Brand positioning

Founded by Charles Edouard Barthes in 2007, EviDenS de Beauté combines "Japanese cosmetic expertise and French elegance". The brand focuses on product efficacy using leading Japanese technology, while bringing the French "sense of pleasure" to the beauty routine, through its use of scent and texture. EviDenS de Beauté is positioned as a premium skincare brand with a focus on formulas created especially for sensitive skin, as well as having anti-ageing benefits. All formulas contain Triple Collagen, its patented ingredient.

2: Target users

EviDenS de Beauté promotes its skincare philosophy of anti-ageing via the core ingredient Triple Collagen and luxury skincare experiences such as high-end spas. The target users are affluent women, seeking gentle but efficient anti-ageing products. To better engage with target users, EviDenS de Beauté often invites VIP customers to afternoon tea parties at luxury hotels to experience their luxury skincare offerings.

3: Star products

EviDenS de Beauté's star product is The Special Mask, designed to lift, tone and hydrate, providing an "icey wake-up boost" for tired and dull complexions. The core ingredient is Triple Collagen which helps promote collagen absorption and enhance skin elasticity. It was created in collaboration with Laboratoires Montaigne in Tokyo, Hokkaido University research team and the National Japanese Institute of Research, who are also working to create artificial skin to treat burns. 92.59% of users found skin tighter and the tone brighter after use, and 74.7% said their pores had shrunk.

4: Recent news

From July to September 2022, EviDenS de Beauté has held afternoon tea parties, high-end spa trips and evening events with brand VIPs in luxury hotels such as The Puxuan Beijing and Rosewood Sanya. These premium personal care experiences focus on both body and mind and sometimes include celebrity appearances, such as former China Central Television host Xiaoqian Wang, who share their skincare routines. In November 2022, EviDenS de Beauté launched a pop-up at department store Beijing SKP in collaboration with SKP Select Beauty.

PHOTO: EVIDENS DE BEAUTÉ