

Swisse

ESTÉE LAUDER
雅诗兰黛



L'ORÉAL
PARIS

Aptamil

M·A·C

ROYAL CANIN

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Anchor 安佳
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JO MALONE
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DIOR

little
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CHEMLINKED

SURVEY REPORT

Chinese Consumers' Purchase Preference on Foreign and Local Brands

BYHEALTH

WINONA
薇诺娜

trouchnie
Chasing Aroma

小鹿蓝蓝
Deer Blue

飞鹤
FIRMUS

PERFECT DIARY
完美日记

BIOHYALUX®

小黄象

认养1头牛
ADOPT A COW

BOITOWN
冰希黎

COLORKEY
珂拉琪

Little
Onnie

宝宝馋了

triptych
of lune

Myfoodie
麦富迪

哆猫猫
More, More

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PART 1

PREFACE

For a long time, Foreign-branded products have held an elevated status in the Chinese market as the hallmark of a comfortable, modern, and middle-class lifestyle. In contrast, local products' frequent safety and quality scandals have made Chinese consumers lack trust in domestic brands. They are ambitious and hungry for imported consumer goods, often the expensive and premium ones for themselves, their families, and their pets. China is, therefore, becoming a magnet for international brands and is viewed by them as a must-win market.

However, recently, the Swedish fast-fashion brand H&M's statement on refusing to use Xinjiang cotton has triggered widespread denunciation and resistance from the Chinese public. H&M's online and offline businesses have been hit hard. Uniqlo, Nike, Adidas, and other brands have also been implicated in the boycott, resulting in a massive celebrity contract termination wave. Besides boycotting those foreign brands, Chinese netizens turn to support domestic brands such as Lining which use Xinjiang cotton to show their support for the region.

Before the anti-Xinjiang cotton controversy, Chinese local brands are actually already on the rise in terms of brand influence and recognition. While foreign brands continue to lead in a number of product categories, domestic brands are making a name for themselves, highlighting the intense competition for consumers' mind share.



The rise of domestic brands is due to the following reasons:



The improvement of China's overall national might has boosted consumer confidence. In the past, consumers lack confidence in the poor quality or backward design of many local products. However, with the continuous development of China's economy and the strengthening of cultural confidence, quality, service, reputation, and cultural identity have become the new labels of local brands. The "made in China" technology, products and services have become increasingly sought after by Chinese consumers.



The new generation of consumer group is more receptive to domestic brands. The Post-90s and post-00s have become the consumer market's main force. Different from previous generations, they are born against rapid national economic development and have more cultural confidence and a sense of national pride. They care more about the embodiment of personality and values instead of brands.



New sales channels help the rise of domestic brands. In the past decades, the Chinese consumption market has flipped from the old brand-building model to a digital ecosystem, from bricks and mortar to e-commerce. Domestic brands have taken advantage of online channels such as e-commerce and social media to occupy more market share. According to the 2020 China Consumer Brand Development Report by AliResearch, Chinese brands' online market shares reached 72% in 2019.

As COVID-19 is yet to be brought under full control at the global level, the world economy is likely to remain in the doldrums. The headwinds against globalization further overshadow the recovery of international trade and investment. In 2020, China proposed a new economic development pattern of "dual circulation", defined as a policy that "takes the domestic market as the mainstay while letting internal and external markets boost each other." The new development pattern is poised to inject new momentum into the growth of local brands.

Under this circumstance, many foreign stakeholders are worried about whether the Chinese government would give more support to the local brands and whether Chinese consumers would tend to choose more domestic brands in the future. Although local brands face historic development opportunities, they still need to work hard in terms of product innovation and brand value enhancement. In this respect, foreign brands have always had an advantage in.

ChemLinked organized a consumer survey and analyzed foreign and domestic brands' purchase preferences across a number of product categories. We write this report to help foreign brands gain an insight into the evolving competitive scenario in China and search for new strategies for continuous growth.

PART 2

ABOUT THE SURVEY

Survey content

Survey information	Description
Time period	March 22 to April 9 2021
Region	Nationwide
Survey subject	Chinese consumers
Form	Questionnaire
Sample conditions	Chinese consumers with FMCG purchase demand
Sample size	3000 sent, 2640 valid
Categories involved	Health food, pet food, infant formula, dairy, baby food, cosmetics

Respondent profile

01

Gender & Age

Most respondents are females, with a proportion of 74.62%. Most respondents are between 18 and 50 years old. The 18 -28 age group and the 29-50 age group account for nearly 50%, respectively.

02

Income

87.12% of respondents have a monthly income above 5,000 yuan. Those with a monthly income of 5,000-10,000 account for the largest share of 43.56%.

03

Region

80% of respondents live in the first-tier cities and new first-tier cities.

Note

First-tier cities: Beijing, Shanghai, Guangzhou, Shenzhen

New first-tier cities: Chengdu, Chongqing, Hangzhou, Wuhan, Xi'an, Tianjin, Suzhou, Nanjing, Zhengzhou, Changsha, Dongguan, Shenyang, Qingdao, Hefei, Foshan.

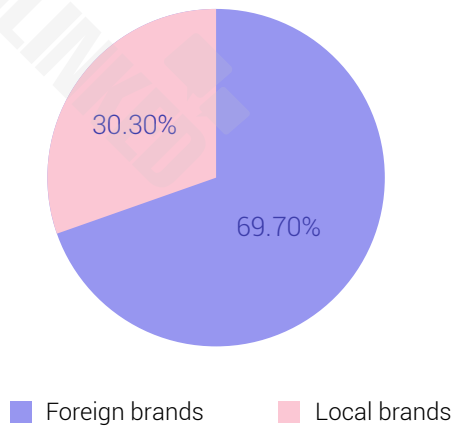
Source: 2020 Ranking of Cities' Business Attractiveness, Yicai

Survey result overview

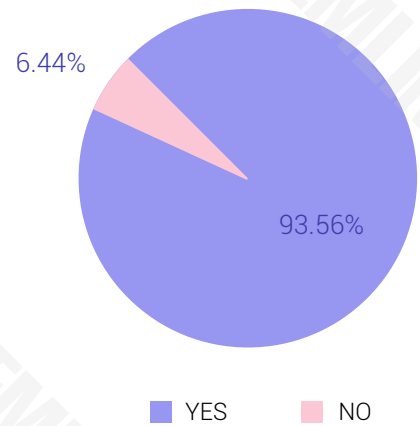
The survey shows that regardless of other factors, respondents are more likely to buy imported products.

More than 90% of respondents show willingness to increase consumption frequency of domestic brands in the future.

In the Case of Similar Prices, Domestic Brands and Foreign Brands Choose Preference



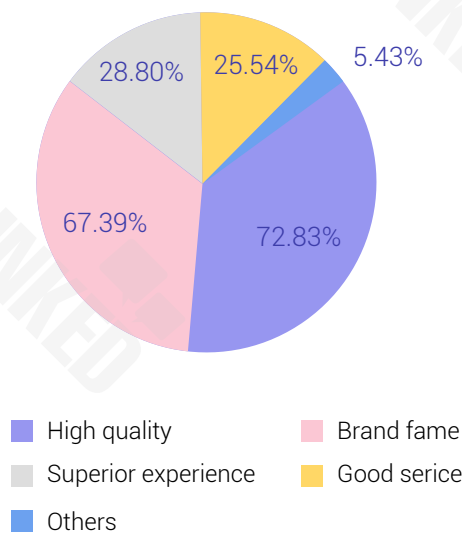
Are you Willing to Increase the Consumption Frequency of Domestic Brands?



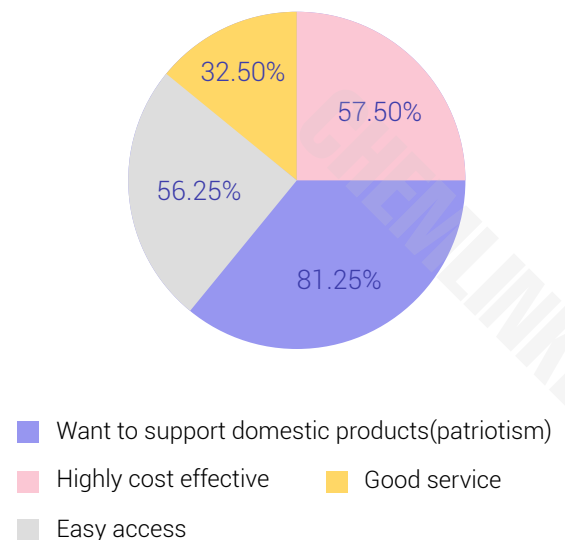
Better product quality is the top reason for choosing foreign brands, accounting for 72.83%, followed by brand fame (67.39%) and superior experience (28.80%).

Patriotic sentiment dominates most respondents' shopping choices for local brands, accounting for 81.25%.

Reasons for Choosing Foreign Brands



Reasons for Choosing Local Brands











Respondents also pay more attention to new foreign brands in the sectors of food & beverage, cosmetics, fashion clothing, shoes and bags.

Online channels represented by e-commerce and social media platforms, friend recommendation and KOL/celebrity/influencer endorsement are the leading information channels for them to know these brands.

They show a willingness to buy foreign brands they newly know except for H&M because the brand enraged Chinese consumers amid the anti-Xinjiang cotton controversy.

Brands	Category	Origin	Future purchase intention	Sources of information
	Health food	New Zealand	Yes	Taobao
	Beverage	Sweden	Yes	Weibo
	Cosmetics	U.S.	Yes	Friend recommendation
	Shoes	UK	Yes	Friend recommendation
	Clothes	South Korea	Yes	Celebrity
	Clothes	South Korea	Yes	Celebrity
	Cosmetics	UK	Yes	Douyin

Brands	Category	Origin	Future purchase intention	Sources of information
	Clothes	Sweden	No	/
	Clothes	South Korea	Yes	Online store
	Shoes	Italy	Yes	Friend recommendation
	Coffee	Italy	Yes	Little Red Book
	Cosmetics	U.S.	Yes	KOL
	Cosmetics	Italy	Yes	Friend recommendation
	Bag	U.S.	Yes	Instagram
	Clothes	UK	Yes	Youtube
	Beverage	U.S.	Yes	Friend recommendation

2021 CHEMLINKED FOOD DIGITAL WEEK

21-25 June 2021 | Time (GMT+8): 10:00 am - 12:15 pm

Event Partners:



Embassy of the Czech Republic
捷克共和国驻华大使馆



China-Britain
Business Council
英中贸易协会



INFANT NUTRITION
COUNCIL
AUSTRALIA & NEW ZEALAND

5000+
Viewers

Sidestep travel restrictions for attendees to share knowledge and connect with global entrepreneurs, opinion leaders and more peers.

15+
Speakers

A unique opportunity to communicate with regulatory experts, government officials, and industry leaders.

6+
Thematic Sessions

Focus on Health Food, Infant Formula, Pet Food, CBEC, and more Imported Food Compliance policies and tips

ABOUT

ChemLinked Food Digital Week, organized by ChemLinked and REACH24H, will feature one week of **informative sessions on China latest food regulatory changes, policy and trend interpretations, and marketing strategies**. From health food or infant formula to cross-border ecommerce, we will have industry experts and government officials present on all the key topic areas to enable you receive updates on these regulations in China and speak directly to professionals.



WHO SHOULD ATTEND

- Food Import & Export
- Food Marketing
- Food Traceability
- Food Regulatory Affairs
- Food Production, Processing & Packaging
- Food Safety Management & Supervision
- Government Food Regulatory & Policy Making
- Compliance Management

Get the most of your Food Digital Week experience!

Join us for CLFDW 2021.

**Register before 20 May to
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PART 3

CATEGORY ANALYSIS

HEALTH FOOD

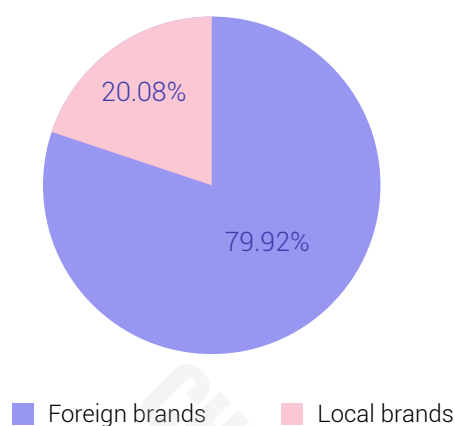
Key takeaways

- Health foods in China shift from high-end consumer goods and gifts to daily nutrition supplement options for many people.
- Health foods produced by local brands are relative single nutritional supplements such as the VC, VE, calcium tablet, etc. In contrast, foreign brands bring more segmented and functional products, such as cranberry tablets for urinary tract health, and deep-sea cod liver oil for blood pressure adjustment, etc.

Consumer preference

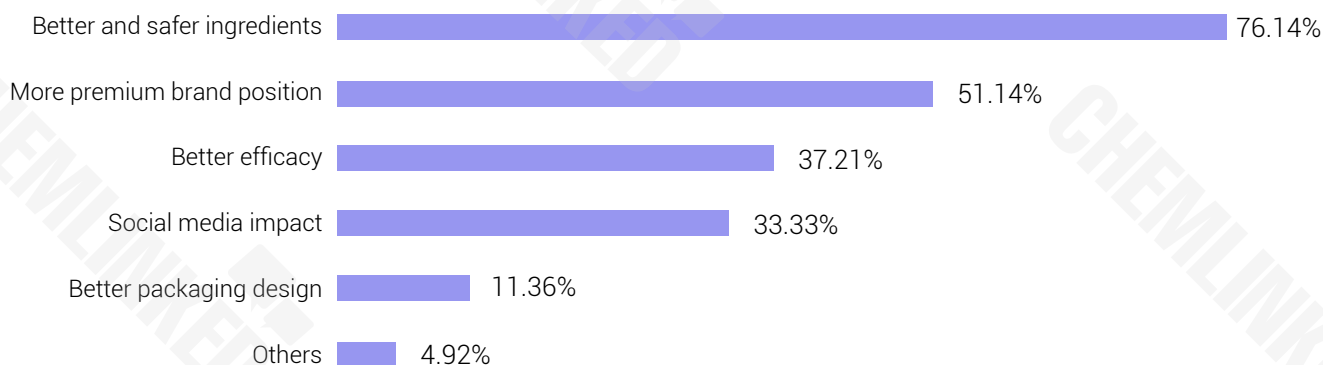
Foreign health food brands are the first shopping choice of most respondents, accounting for nearly 80%.

Local vs. Foreign Health Food Brand Purchase Preference



Better and safer ingredients (76.14%), more premium brand position (51.14%), and better efficacy (37.12%) are the top 3 factors driving respondents to choose foreign health food brands.

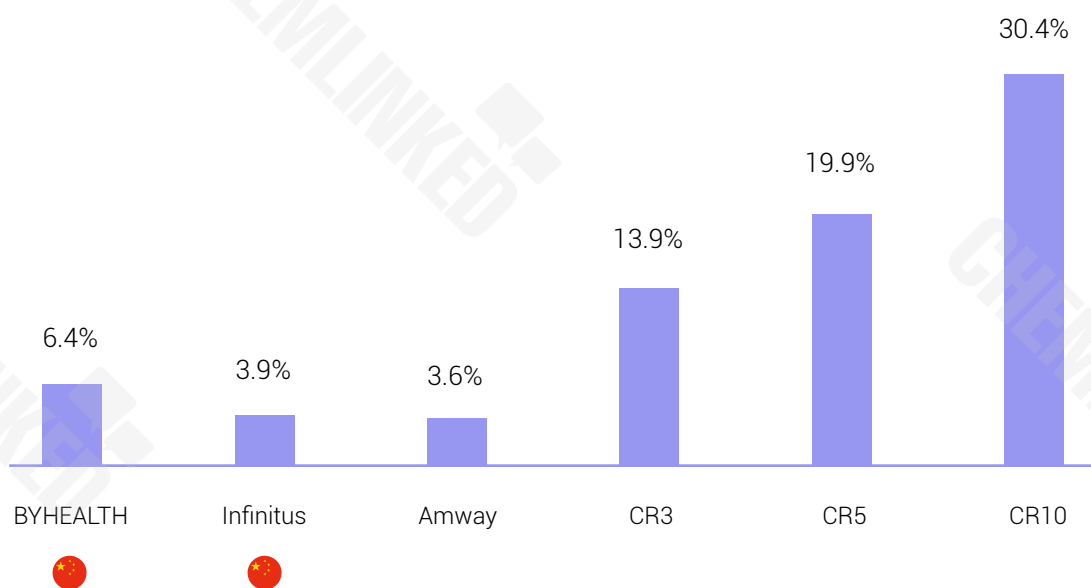
Reasons for Choosing Foreign Health Food Brands



Competitive landscape

Low market concentration is a prominent feature of China's health food industry. In 2020, the CR3 (market share of the top three companies), CR5 (market share of the top five companies) and CR10 (market share of the top 10 companies) in China's health food market were 13.9%, 19.9%, and 30.4% respectively. BYHEALTH is the company with the largest market share of 6.4%.

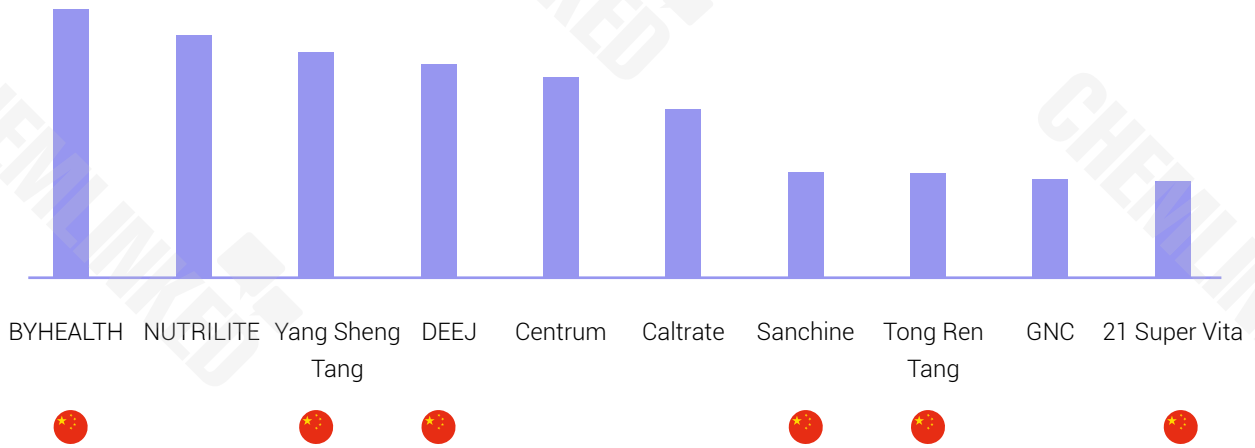
Market Share of Major Companies in China's Health Food Industry in 2020



[Data source: Euromonitor, Qianzhan Industry Research Institute]

BYHEALTH's brand influence index also ranked first, followed by NUTRILITE and Yang Sheng Tang.

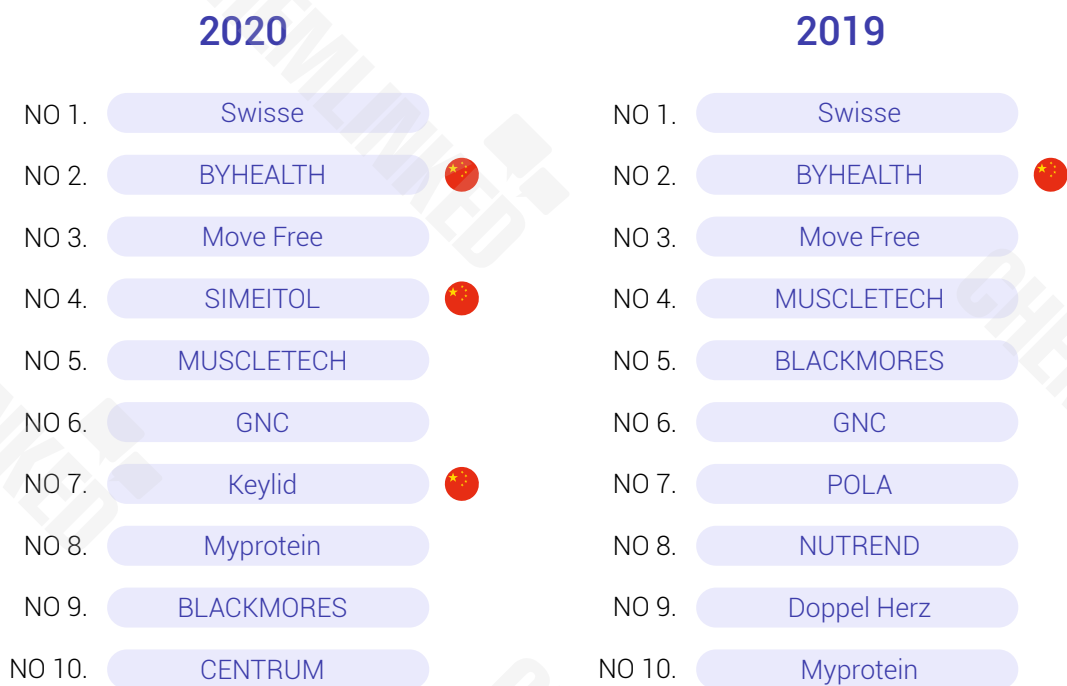
Impact Index of Major Brands in China's Health Food Industry in 2020



[Data source: Chinapp.com, Qianzhan Industry Research Institute]



Foreign health food brands deliver outstanding performance on the e-commerce platform. During the Tmall Double 11 Shopping Festival in 2019 and 2020, foreign brands accounted for nine and seven spots of the top-selling lists, respectively.

Top 10 Selling Health Food Brands During the Tmall Double 11 Shopping Festival



[Data source: ChemLinked]

Comparison of representative brands

		
Tmall flagship store followers	3.57m	4.594m
Top 3 selling product (total sales since launch)	Calcium + Vitamin D 1,039,952 units Liver Detox 889,962 units Grape Seed 479,481 units	Collagen gummy 608,911 units Men's Multi-vitamin & Mineral 433,732 units Melatonin 350,545 units
Weibo official account followers	1.66m	2.81m
Little Red Book notes	90,000+	20,000+
Is there a WeChat shopping applet?	Yes	No
Spokesperson	Dilraba Dilmurat (actress, 1992, @Dear-迪丽热巴, 73.53m followers)	Cai Xukun (idol, 1998, @蔡徐坤, 34.79m followers)

[Deadline for statistics: April 15]

Competitiveness analysis:

- Swisse performs better in online channels such as the e-commerce platform Tmall, social media platform Little Red Book and WeChat shopping applet.
- Both brands have invited young celebrities (born after 1990 and 1995) to be the brand spokespersons, signifying their ambitions on younger generation of consumers.

INFANT FORMULA

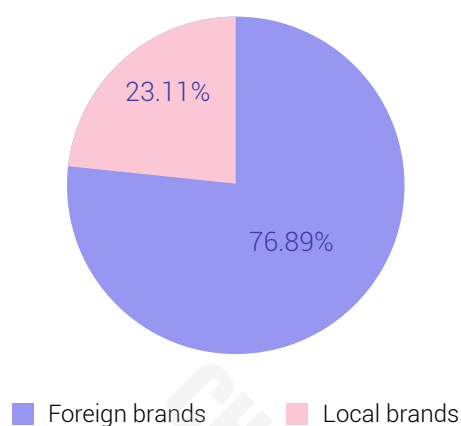
Key takeaways

- Increasing local competition puts pressure on international brands, as Chinese-grown brands represented by Feihe (Firmus) have begun to clash head on with them.
- The biggest advantage of most domestic brands is their ability to organize channel services in lower-tier cities. The COVID-19 outbreak has also brought some changes to China's infant formula market because of quarantine measures, production issues, and interrupted logistics.

Consumer preference

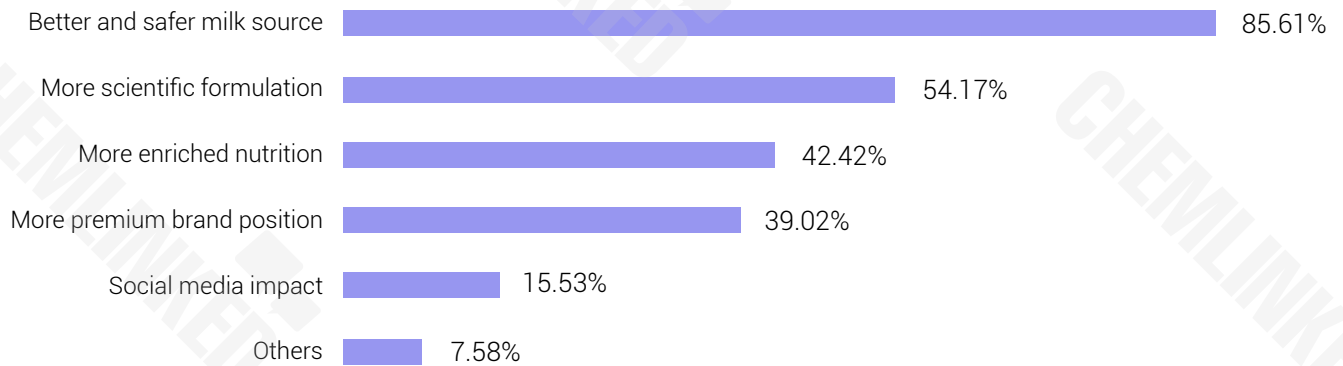
Foreign infant formula brands are the first shopping choice of most respondents, accounting for 76.89%.

Local vs. Foreign Infant formula Brand Purchase Preference



The survey found that the factors most likely to lead respondents to buy foreign infant formulas were better and safer milk source (85.61%), more scientific formulation (54.17%), and more enriched nutrition (42.42%).

Reasons for Choosing Foreign Infant formula Brands

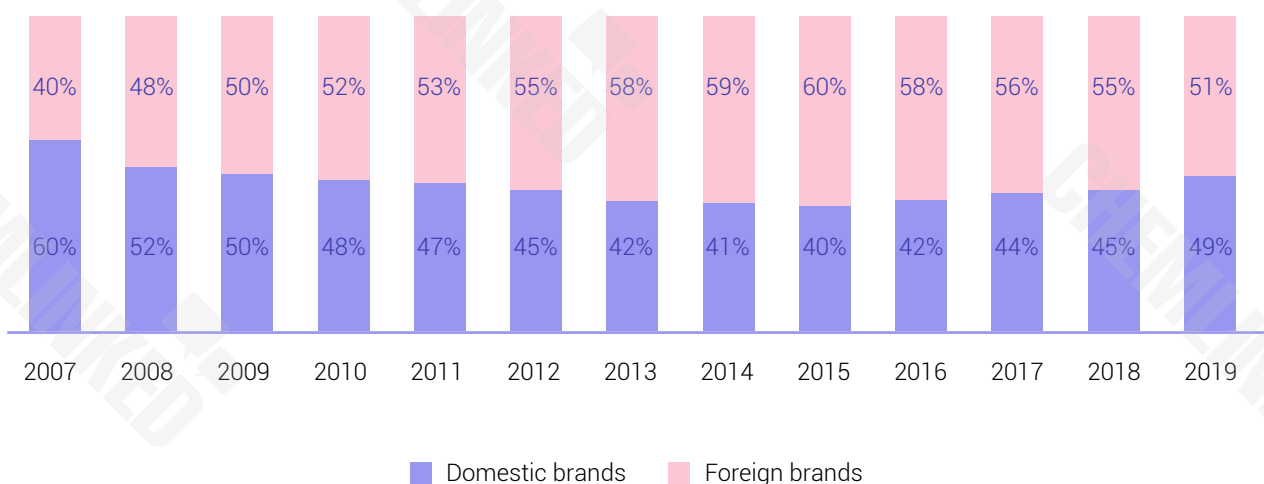


Competitive landscape

Domestic infant formula used to dominate the market and accounted for 60% market share in 2007, then dropped significantly from 2008 due to the Melamine scandal. The scandal-induced trust crisis has given foreign brands excellent opportunities for expansion since then.

However, in recent two years, the market proportion of Chinese domestic milk powder brands has rebounded to a half-half situation, and by 2020, domestic stakeholders have controlled more than 50% of the market.

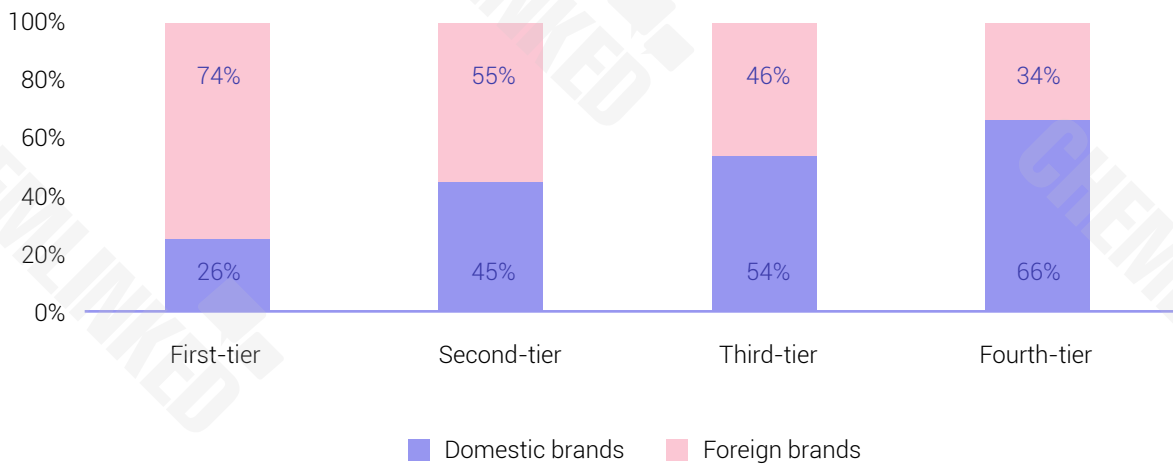
Infant Formula Market Share in China



[Data source: Euromonitor]

Domestic brands have more advantages in the lower-tier markets.

Foreign Brands vs. Domestic Brands Market Share Comparison Across Cities in 2019



[Data source: Nielsen, Qianzhan Industry Research Institute]

Despite the heated competition, foreign brands still have a strong presence, which occupied seven positions in the top 10 baby food brands by market share in 2020 H1. Aptamil had the largest share, accounting for 13.0%.

Market Share of Top 10 Infant Formula Companies in China

	2018	2019	2020H1
NO 1.	Nestlé 13.90%	Nestlé 13.50%	Aptamil 13.0%
NO 2.	Danone 8.10%	Firmus 13.30% 🇨🇳	Mead Johnson 8.0%
NO 3.	Firmus 8.60% 🇨🇳	Danone 10.10%	Friso 7.4%
NO 4.	Abbott 6.80%	Abbott 6.70%	Firmus 6.9% 🇨🇳
NO 5.	Mead Johnson 6.50%	Mead Johnson 6.10%	Wyeth 6.0%
NO 6.	Friso 5.30%	Junlebao 5.50% 🇨🇳	Abbott 4.7%
NO 7.	Yili 5.00% 🇨🇳	Yili 5.30% 🇨🇳	Yili 3.5% 🇨🇳
NO 8.	Yashili 4.80% 🇨🇳	Friso 5.10%	Junlebao 3.5% 🇨🇳
NO 9.	Ausnutria 3.90% 🇨🇳	Ausnutria 5.00% 🇨🇳	Nestlé 3.2%
NO 10.	H&H group 3.20% 🇨🇳	H&H group 4.90% 🇨🇳	a2 3.1%

[Data source: Euromonitor, ECdataway]

Foreign infant formula brands also perform better in online channels, occupying eight seats in the top-selling lists during the 2019 and 2020 Tmall Double 11 Shopping Festival.

Top 10 Selling Infant Formula Brands During the Tmall Double 11 Shopping Festival

2020



NO 1.	Aptamil	
NO 2.	Friso	
NO 3.	Wyeth	
NO 4.	Firmus	🇨🇳
NO 5.	a2	
NO 6.	Mead Johnson	
NO 7.	Junlebao	🇨🇳
NO 8.	Abbott	
NO 9.	Biostime	
NO 10.	Nutrilon	

2019

NO 1.	Aptamil	
NO 2.	illumina	
NO 3.	a2	
NO 4.	Friso	
NO 5.	Firmus	🇨🇳
NO 6.	Mead Johnson	
NO 7.	Abbott	
NO 8.	Wyeth	
NO 9.	Nutrilon	
NO 10.	Beingmate	🇨🇳

[Data source: ChemLinked]

Comparison of representative brands

		
Tmall flagship store followers	1.27m	1.94m
Top 3 selling product (total sales since launch)	Classic version stage3 800g 244,211 units Classic version stage1 800g 156,136 units Profutura stage1 380g 153,795 units	ASTROBABY Stage1 300g 117,126 units ASTROBABY Stage1 700g 98,717 units Super Feifan Stage3 400g*6 84,234 units
Weibo official account followers	50,000	810,000
Little Red Book notes	30,000+	10,000+
Is there a WeChat shopping applet?	Yes	Yes
Spokesperson	Li Na (tennis star, @李娜, 22.49m followers)	Wu Jing (actor and director, @吴京, 13.93m followers)

[Deadline for statistics: April 15]

Competitiveness analysis:

- Aptamil performs better in online channels such as the e-commerce platform Tmall and social media platform Little Red Book.
- Both brands have launched WeChat shopping applet, which is regarded as a promising sales channel for brands.

UHT MILK

(UHT white milk and ambient yogurt)



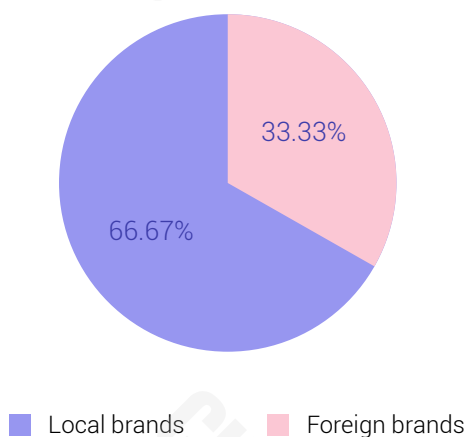
Key takeaways

- UHT milk, which consists of UHT white milk and ambient yogurt, occupies a dominant part in the Chinese dairy consumption market.
- Domestic brands are keen on rolling out ambient yogurts. The three leading brands of Ambrosial (Yili), Chunzhen (Mengniu), and Momchilovtsi (Bright Dairy) occupy 70%-80% of the market share.

Consumer preference

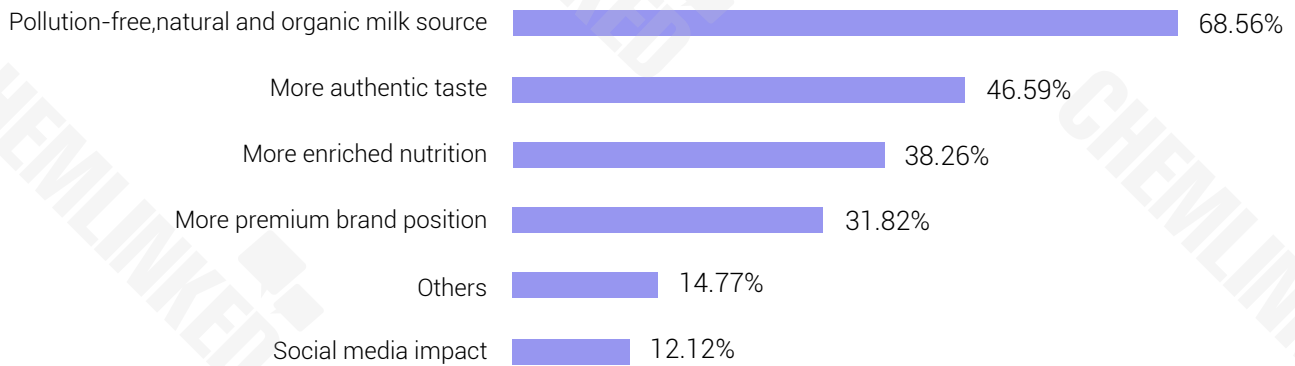
66.67% of respondents are more willing to choose local milk brands.

Local vs. Foreign UHT Milk Brand Purchase Preference



If choosing foreign milk brands, they would be attracted most by claims of pollution-free, natural and organic milk source (68.56%), more authentic taste (46.59%), and more enriched nutrition (38.26%).

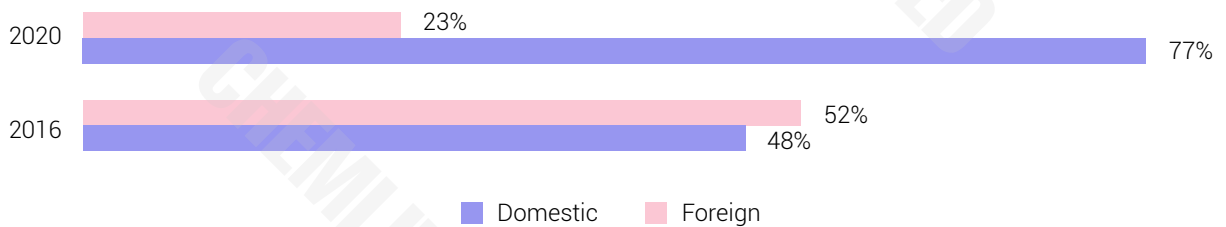
Reasons for Choosing Foreign UHT Milk Brands



Competitive landscape

China's UHT milk market is occupied by large brands, and domestic brands have reclaimed dominance over the market.

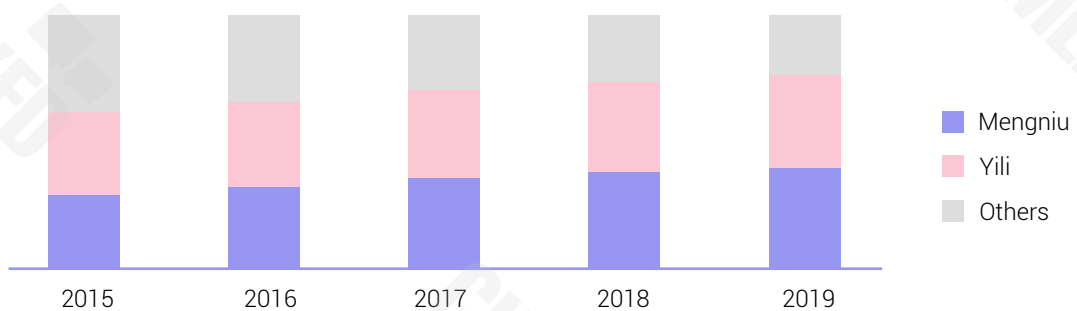
Foreign vs. Domestic Market Share 2016 & 2020



[Data source: China Skinny]

Yili and Mengniu are two domestic giants in the UHT white milk sector.

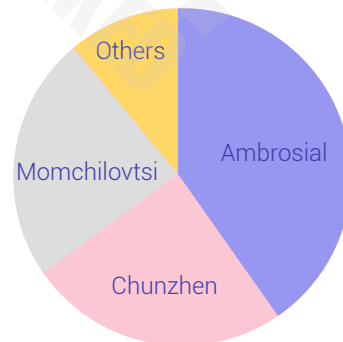
Market Share of UHT White Milk in China



[Data source: Dingxiang Doctor]

In the ambient yogurt sector, the three leading local brands of Ambrosial (Yili), Chunzhen (Mengniu), and Momchilovtsi (Bright Dairy) occupy 70%-80% of the market share.

Market Share of Ambient Yogurt in China



[Data source: Dingxiang Doctor]

Local UHT milk brands occupied dominant positions in the top-selling lists in the past two years of Tmall Double 11 Shopping Festival.

Top 10 Selling UHT Milk Brands During the Tmall Double 11 Shopping Festival



UHT white milk

Ambient yogurt

	2020	2019	2020	2019
NO 1.	Mengniu 🇨🇳	Mengniu 🇨🇳	Adopt a Cow 🇨🇳	Mengniu 🇨🇳
NO 2.	Yili 🇨🇳	Deluxe Milk 🇨🇳	Yili 🇨🇳	Adopt a Cow 🇨🇳
NO 3.	Adopt a Cow 🇨🇳	Yili 🇨🇳	Mengniu 🇨🇳	Yili 🇨🇳
NO 4.	Deluxe Milk 🇨🇳	Weidendorf 🇨🇳	Ambrosial 🇨🇳	Pom' Potes
NO 5.	Weidendorf 🇨🇳	Theland 🇨🇳	Junlebao 🇨🇳	Weidendorf 🇨🇳
NO 6.	Australia's Own 🇨🇳	Adopt a Cow 🇨🇳	Bright Dairy 🇨🇳	WAHAHA 🇨🇳
NO 7.	Theland 🇨🇳	Australia's Own 🇨🇳	Pom' Potes	Junlebao 🇨🇳
NO 8.	Bai Fei Lao 🇨🇳	Bai Fei Lao 🇨🇳	Weidendorf 🇨🇳	Jelley Brown
NO 9.	Sanyuan 🇨🇳	Anchor	WAHAHA 🇨🇳	COOL 🇨🇳
NO 10.	Anchor	Xiao Xi Niu 🇨🇳	Jinghe 🇨🇳	MOMCHILOVTSI 🇨🇳

[Data source: ChemLinked]

Comparison of representative brands

		
Tmall flagship store followers	1.06m	8.652m
Top 3 selling product (total sales since launch)	Adult milk powder 604,545 units UHT Whole milk 16 boxes*2 505,105 units UHT Whole milk 16 boxes 362,138 units	Ambient yogurt 12 boxes*2 2,683,784 units UHT whole milk 12 boxes*2 952,268 units Children's cheese sticks 676,261 units
Weibo official account followers	170,000	230,000
Little Red Book notes	40,000+	10,000+
Is there a WeChat shopping applet?	Yes	Yes
Spokesperson	/	/

[Deadline for statistics: April 15]

Competitiveness analysis:

- Adopt a cow, a new domestic brand that grows up on the back of the Internet, delivers better performance in Tmall due to frequent live-streaming campaigns.

BABY FOOD

(complementary food and snacks)

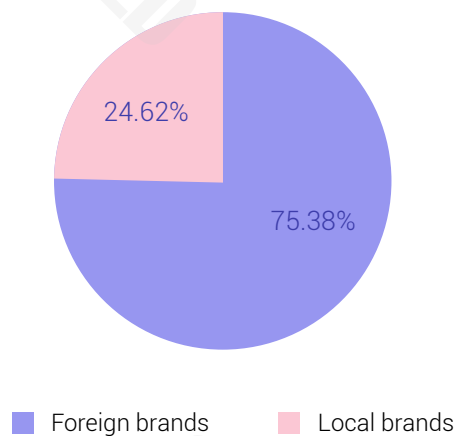
Key takeaways

- Imported brands dominate China's baby food market, and the market concentration is relatively high.
- In recent two years, there emerged several new local brands focusing on the e-commerce channel.

Consumer preference

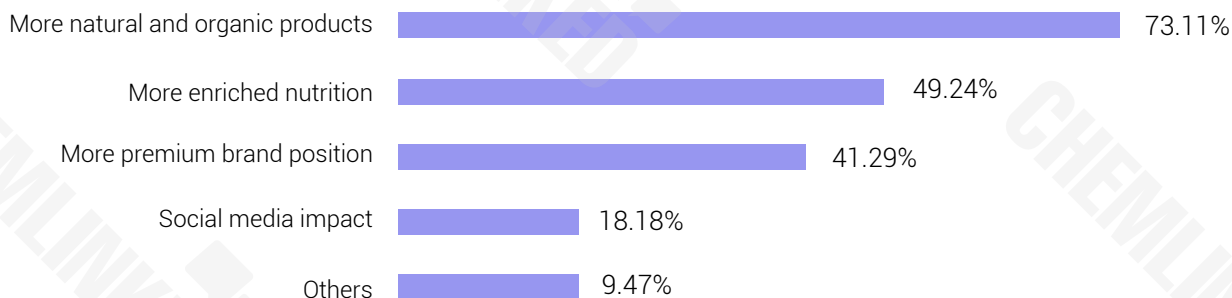
75.38% of respondents are more willing to buy foreign baby food brands.

Local vs. Foreign Baby Food Brand Purchase Preference



More natural and organic products (73.11%), more enriched nutrition (49.24%), and more premium brand position (41.29%) are the top 3 reasons for respondents to choose foreign brands.

Reasons for Choosing Foreign Baby Food Brands



Competitive landscape

Foreign brands occupy the baby complementary food market in China. Chinese consumers prefer to choose foreign brands such as HEINZ, Gerber, and Hipp. In the 2019 China's Baby Complementary Food Market Brand Influence top 10 List, foreign brands occupied seven spots, among which HEINZ, Gerber, and Hipp ranked the top three.

2019 China's Baby Complementary Food Market Brand Influence Top 10 List























[Data source: cnpp.com, Qianzhan Industry Research Institute]

Although foreign brands maintain the competitive edge, local brands started to stand out, with more positions in the top 10 selling lists in the past two years of Tmall Double 11 Shopping Festival.

Top 10 Selling Baby Food Brands during the Tmall Double 11 Shopping Festival

Complementary food

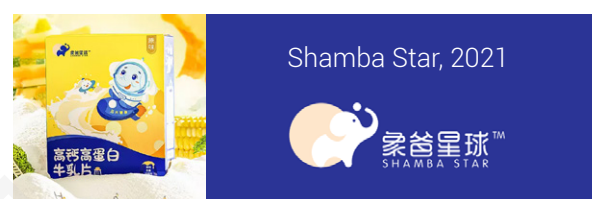
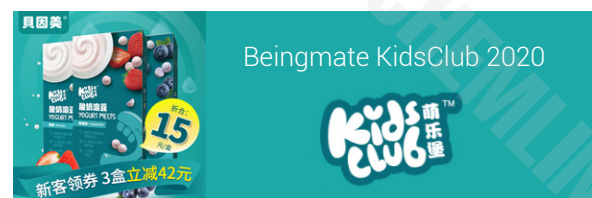
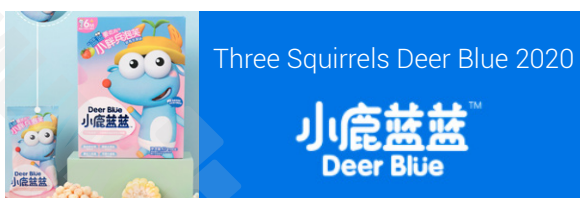
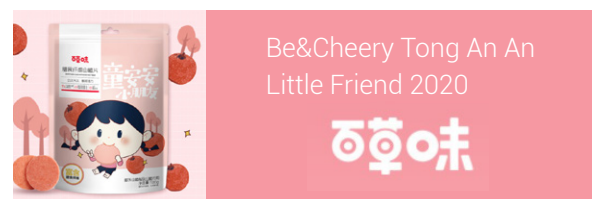
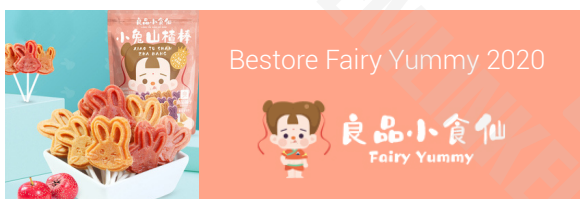
Snacks

	2020	2019	2020	2019
NO 1.	Gerber	Gerber	Deer Blue 	Gerber
NO 2.	Little Freddie	Little Freddie	Baobao Chanle 	Happy Baby
NO 3.	Baobao Chanle 	HEINZ	Gerber	Little Freddie
NO 4.	Engnice 	Earth's Best	Engnice 	Polysun 
NO 5.	HEINZ	Happy Baby	Beakid 	SunRype
NO 6.	Fangguang 	Engnice 	RIVSEA 	Richfield 
NO 7.	Earth's Best	Bellamy's	Happy Baby	Engnice 
NO 8.	RIVSEA 	Fangguang 	Qiutian Manman 	Little remedies
NO 9.	Deer Blue 	Eastwes 	Little Freddie	Beakid 
NO 10.	Happy Baby	RIVSEA 	Polysun 	maxigenes

[Data source: ChemLinked]

Since 2020, domestic brands, represented by Deer Blue and Baobao Chanle, have emerged as strong rivals of foreign brands in this sector.

New domestic baby food brands





Lyfen Yizai, June, 2020



Yellow Elephant, 2019

Comparison of representative brands

		
Small flagship store followers	882,000	640,000
Top 3 selling product (total sales since launch)	Baby rice 1,364,128 units Fruit puree 100g*10 191,110 units Yogurt fruit puree 100g*10 158,493 units	Sesame sea moss floss 709,954 units Sesame sea moss 660,953 units Cod puffs 528,539 units
Weibo official account followers	28496	317
Little Red Book notes	1.4m+	30,000+
Is there a WeChat shopping applet?	No	Yes
Spokesperson	/	/

[Deadline for statistics: April 15]

Competitiveness analysis:

- As an emerging local baby food brand, Baobao Chanle has ushered in explosive growth since 2020. Although the upstart shows strong growth momentum, it still lags behind the foreign brands in online sales and marketing.

PET FOOD



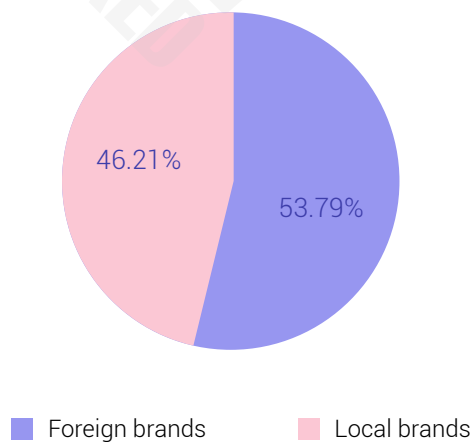
Key takeaways

- 2021 will witness the explosive growth of China's pet food market, with more imported new entrants.
- Domestic pet food brands also emerge with eye-catching sales performance on the e-commerce channel.

Consumer preference

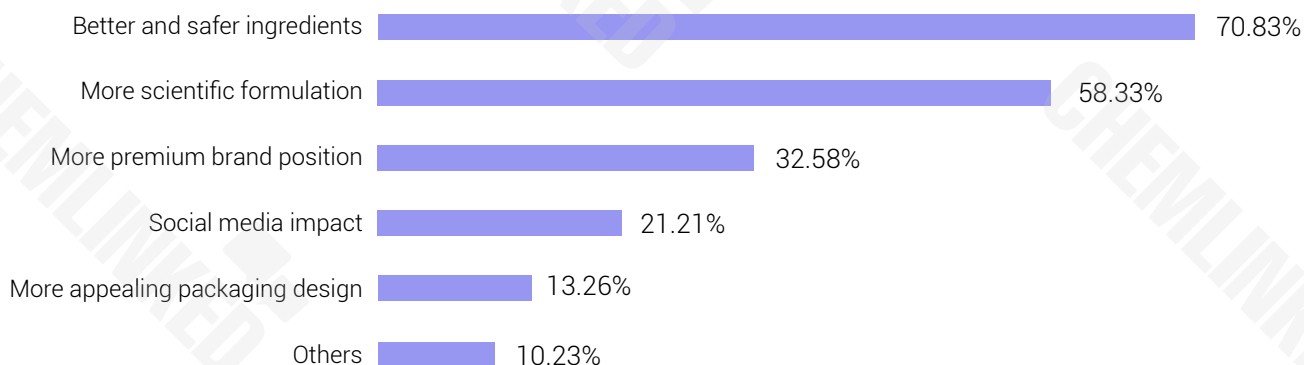
Respondents' preferences for domestic and imported pet food brands were relatively equal, with a little more preference for foreign brands (53.79%).

Local vs. Foreign Pet Food Brand Purchase Preference



The survey found that the factors most likely to lead respondents to buy foreign pet food brands were better and safer ingredients (70.83%), more scientific formulation (58.33%), and more premium brand position (32.58%).









Reasons for Choosing Foreign Pet Food Brands



Competitive landscape

Foreign brands take the lead in entering the domestic pet food market and occupy an important position. In recent years, the market shares of domestic brands, represented by NatureBridge, Gambol, and Crazy Dog, have increased substantially.

Major Players in the Chinese Pet Food Market

Company	Type	Categories	Top brands
Mars	International	Primary foods Snacks Supplements	  
Nestle	International	Primary foods Snacks	  
NatureBridge	China	Primary foods	
Gambol	China	Primary foods Snacks Supplements	 有猫有狗 就有麦富迪

Ramical

China & Australia

Primary foods
Supplements



Unicharm

International

Primary foods
Snacks



Sanpo

China & France

Primary foods



Others



Local pet food brands began to become strong rivals of foreign brands in the past two years of the Tmall Double 11 Shopping Festival.

Top 10 Selling Pet Food Brands during the Tmall Double 11 Shopping Festival

2020



- NO 1.
- NO 2.
- NO 3.
- NO 4.
- NO 5.
- NO 6.
- NO 7.
- NO 8.
- NO 9.
- NO 10.

2019

- NO 1.
- NO 2.
- NO 3.
- NO 4.
- NO 5.
- NO 6.
- NO 7.
- NO 8.
- NO 9.
- NO 10.

[Data source: ChemLinked]

Comparison of representative brands

		
Small flagship store followers	188,000	1.81m
Top 3 selling product (total sales since launch)	Grain free small breed petite 11,768 units Grain free adult cat 9,178 units Grain free kitten 8,208 units	Dog snack dried chicken meat 1,248,157 units Small breed petite meal 673,016 units Meat package 603,384 units
Weibo official account followers	/	170,000
Little Red Book notes	400+	4800+
Is there a WeChat shopping applet?	No	Yes
Spokesperson	/	Nicholas Tse (singer, @谢霆锋, 12.17m followers)

[Deadline for statistics: April 15]

Competitiveness analysis:

- Domestic brand Myfoödie is more sophisticated in local marketing through building presence in mainstream social media platforms and enlarging brand influence with celebrity endorsement.

SKINCARE



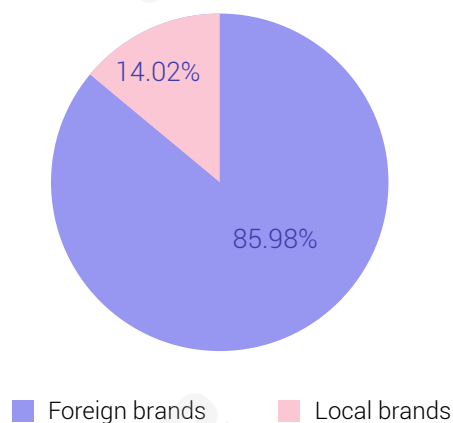
Key takeaways

- International brands still dominate the Chinese market, and more brands are accelerating their pace to enter the Chinese market. The cross-border e-commerce channel represented by Tmall Global becomes their first choice.
- Local brands with unique focuses are rising, such as brands focusing on sensitive skin.

Consumer preference

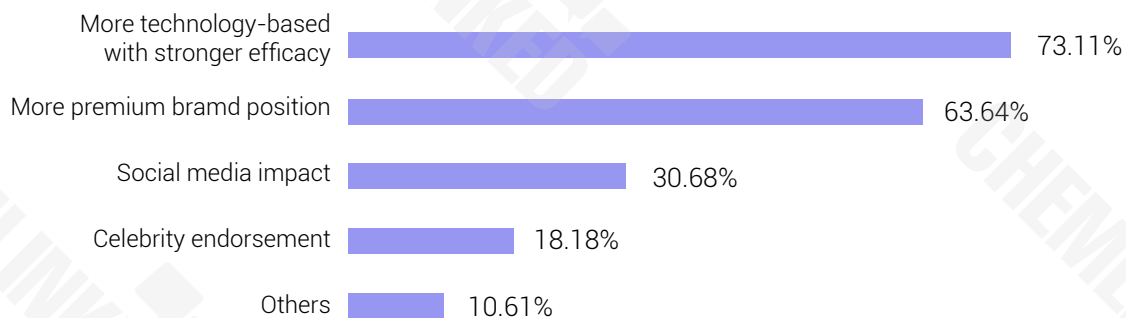
Foreign brands (85.98%) are more popular in the skincare sector.

Local vs. Foreign Skincare Brand Purchase Preference



Respondents choose foreign skincare brands mainly due to more potent efficacy (73.11%), brand fame and position (63.64%), and social media impact (30.68%).

Reasons for Choosing Foreign Skincare Brands



Competitive landscape

International brands still dominate the skincare sector but local brands are also emerging. For example, HFP, Chinese version of The Ordinary, gains traction because of its simple packaging and highlight of ingredients.

Top 10 Selling Skincare Brands on Taobao in 2020



[Data source: Cyanhill Capital]

In 2020 Double 11, 9 of top 10 best-selling skincare brands were international brands. Winona was only local brand to enter the list. The brand is regarded as the representative of functional skincare brands by consumers.

Top 10 Selling Skincare Brands during the Tmall Double 11 Shopping Festival




- | | | | |
|--------|--|--------|---|
| NO 4. | The history of whoo | NO 4. | Olay |
| NO 5. | Olay | NO 5. | SK-II |
| NO 6. | SK-II | NO 6. | PECHOIN  |
| NO 7. | SULWHASOO | NO 7. | The history of whoo |
| NO 8. | Shiseido | NO 8. | CHANDO  |
| NO 9. | Winona  | NO 9. | Shiseido |
| NO 10. | LA MER | NO 10. | Winona  |

[Data source: ChemLinked]

New domestic functional skincare brands




Winona
WINONA
薇诺娜




Dr. Yu
玉泽
Dr.Yu



Voolga
Voolga



Biohyalux (Bloomage Biotech)
BIOHYALUX[®]



MedRepair (Bloomage Biotech)
专为敏感肌肤研制
MEDREPAIR[®]
米蓓尔[®]



QuadHA (Bloomage Biotech)
QUADHA | 夸迪



Dr. Alva
ALVA 瑗尔博士



HBN
HBN[®]
Honeymate Beauty Naturalism

Comparison of representative brands

	ESTÉE LAUDER 雅诗兰黛	WINONA 薇诺娜
Tmall flagship store followers	23.23m	7.97m
Top 3 selling product (total sales since launch)	Advanced Night Repair Eye 2,565,322 units Double Wear Foundation 1,792,814 units Advanced Night Repair 1,215,905 units	Anti-Sensitive Moisturizing Tolerance-Extreme Cream(15g) 3,764,163 units Moisturizing & Softening Cream 1,189,698 units Anti-Sensitive Moisturizing Toler- ance-Extreme Cream(50g) 6,214,842 units
Weibo official account followers	3.58m	1.52 m
Little Red Book notes	670,000+	70,000+
Is there a WeChat shopping applet?	Yes	Yes
Spokesperson	Yang Mi (actress, @杨幂, 100m followers)	Shu Qi (actress, @舒淇, 41.03m followers)

[Deadline for statistics: April 15]

Competitiveness analysis:

- Both brands have achieved great sales since they opened their Tmall stores. The total sales of Winona's top 3 products even exceeded those of Estee Lauder's top 3 products. However, Estee Lauder undoubtedly performs better on social media, with more fans and posts.
- Estee Lauder has been a famous and popular brand in China's skincare market for a long time, but it has not launched impressive new products for a long time. Despite its long existence, Winona has only become familiar to consumers in the last two years for its specialty in solving sensitive skin problems. Emerging of local brands indeed poses a threat to the dominance of big international brands in China.

MAKEUP

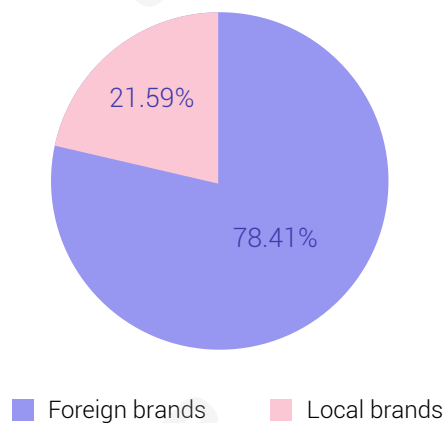
Key takeaways

- International brands have dominated this sector for a long time, but local brands represented by Perfect Diary and Florasis have stood out as strong rivals in the last three years.
- In Chinese consumers' eyes, international brands represent high reputation and local brands represent high price-performance ratio.

Consumer preference

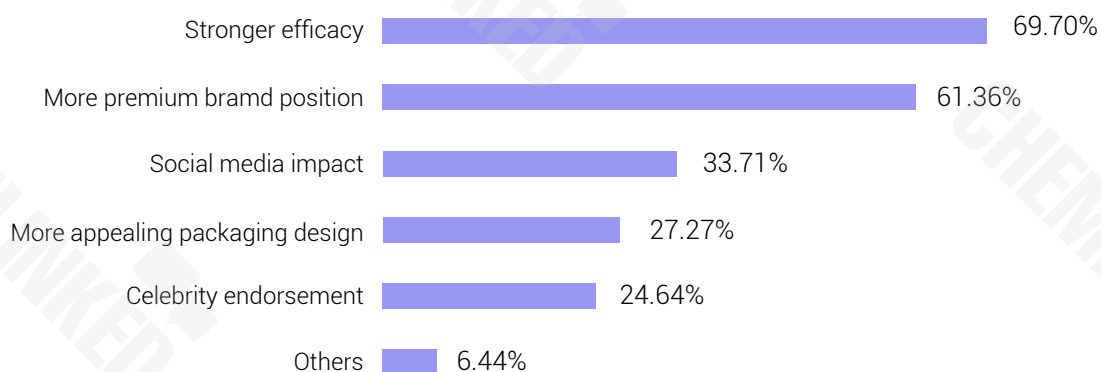
In our survey, foreign brands (78.41%) are more popular in the makeup category.

Local vs. Foreign Makeup Brand Purchase Preference



Respondents choose foreign makeup brands for their stronger efficacy (69.70%), more premium brand position (61.36%) and social media impact (33.71%).

Reasons for Choosing Foreign Makeup Brands

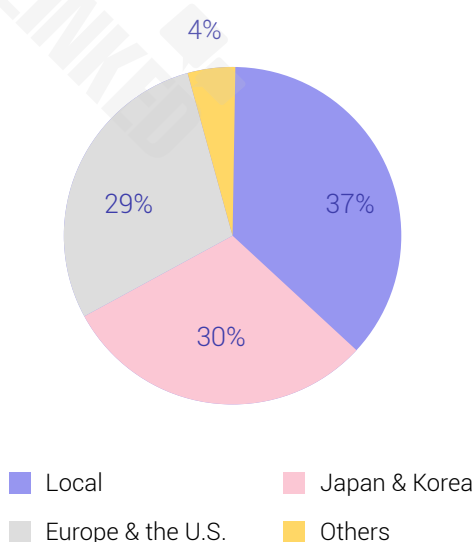


Competitive landscape

In recent years, local makeup brands become increasingly popular among consumers under the tide of China Chic (国潮). Many new local brands emerged and grew quickly to clash head on with international brands. According to EqualOcean, in 2019, local makeup brands accounted for 61% of the total sales of makeup products on Tmall, and its growth rate reached 82%.

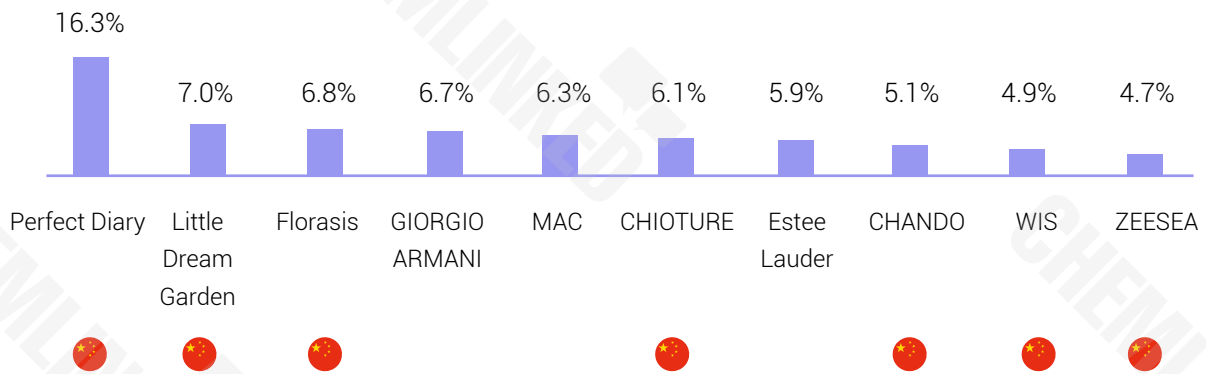
In 2020, consumers pay more attention to domestic brands than those from Europe, the United States, Japan and South Korea. Seven of the Top 10 brands are domestic brands, and Perfect Diary's attention is far ahead.

Country Distribution of Top 100 Brands with Most Attention



[Data source: QuestMobile]

Top 10 Brands with Most Attention by Makeup Consumers



[Data source: QuestMobile]

Local rising stars Perfect Diary and Florasis have surpassed foreign brands to become the top 2 best-selling brands on Taobao in 2020.

Top 10 selling makeup brands on Taobao in 2020




[Data source: Cyanhill Capital]

Perfect Diary also clinched the No.1 place of the makeup category in the Tmall Double 11 Shopping Festival for two consecutive years from 2019 to 2020.

Top 10 Selling Makeup Brands during the Tmall Double 11 Shopping Festival

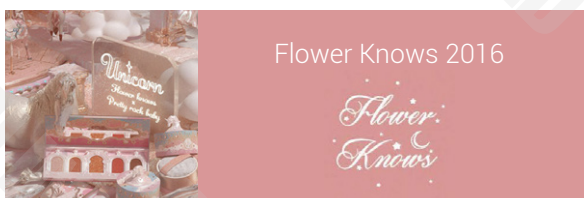


- NO 3. GIORGIO ARMANI
- NO 4. 3CE
- NO 5. MAC
- NO 6. Lancome
- NO 7. YSL
- NO 8. Estee Lauder
- NO 9. Maybelline
- NO 10. Givenchy



- NO 3. Estee Lauder
- NO 4. Lancome
- NO 5. GIORGIO ARMANI
- NO 6. Givenchy
- NO 7. Maybelline
- NO 8. Florasis 
- NO 9. YSL
- NO 10. 3CE

[Data source: ChemLinked]

New domestic makeup brands



Comparison of representative brands

		PERFECT DIARY 完美日记 
Tmall flagship store followers	18.76m	16.95m
Top 3 selling product (total sales since launch)	Bullet lipstick full color 4,996,218 units Bomb lipstick matte 2,804,227 units Bomb lipstick gift box 847,091 units	Matte lip glaze 17,007,700 units Velvet lip glaze 8,301,859 units Animal eye shadow palette 6,214,842 units
Weibo official account followers	15.2m	570,000
Little Red Book notes	590,000+	310,000+
Is there a WeChat shopping applet?	Yes	Yes
Spokesperson	Zhang Yixing (singer, @努力努力再努力x, 50.3m followers)	Zhu Zhengting (idol, @THEO-朱正廷, 23.46m followers)

[Deadline for statistics: April 15]

Competitiveness analysis:

- Both foreign and local cosmetics brands are digital-savvy players in the Chinese market. However, as a new brand that only four years old, Perfect Diary can achieve comparable results with big international brands, proving local brands' substantial potential.
- Perfect Diary's sales outperformed MAC's because of its successful marketing strategies and high-cost-per-performance-ratio products. Chinese new brands have a keen insight into the habits of the current young people, and makes use of social media platforms such as Little Red Book to strike a chord with the young consumer group.

PERFUME

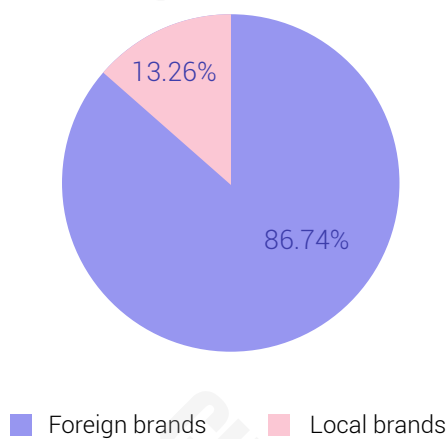
Key takeaways

- More niche brands enter China's e-commerce platform like Tmall and deliver excellent performance.
- Classic luxury perfumes continue to grow in popularity.
- Local brands still lack competitive advantages.

Consumer preference

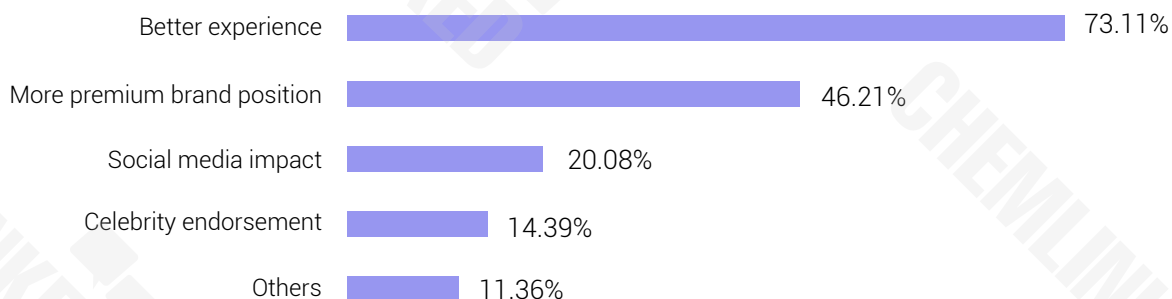
Foreign brands obtain a landslide advantage in consumer preference with a high proportion of 86.74%.

Local vs. Foreign Perfume Brand Purchase Preference



Better experience (73.11%), more premium brand position (46.21%), and social media impact (20.08%) are the top 3 factors attracting respondents to choose foreign fragrance brands.

Reasons for Choosing Foreign Perfume Brands



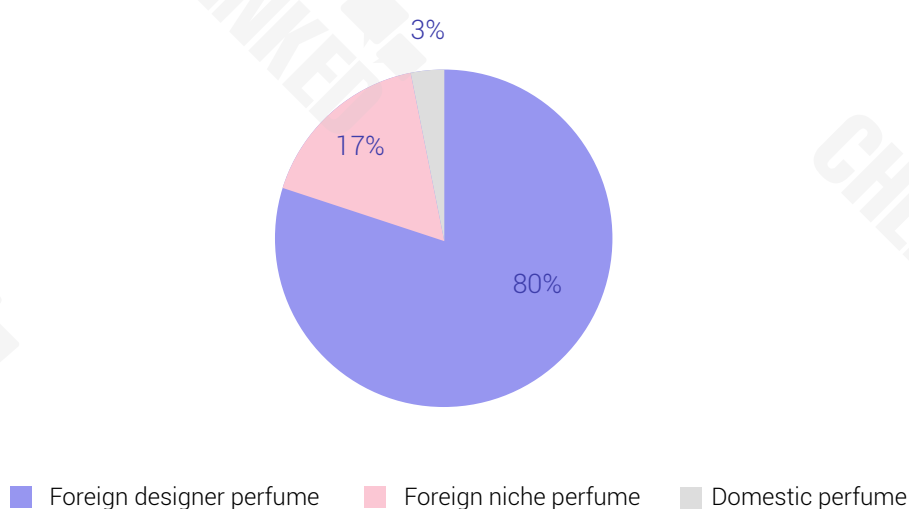
Competitive landscape

The Chinese perfume market has a high degree of brand concentration, and international brands dominate the market. Luxury-based players perform well and niche brands are growing at an accelerated pace.

According to the 2019 Baidu Perfume Industry Report, 80% of Baidu (Chinese searching engine equivalent to Google) searches were for big-brand perfumes, and 17% searches were for niche brands.

With the rapid growth of China's perfume market, a group of fledgling domestic perfume brands with affordable prices and local stories have taken a 3% share in the search of perfume brands.

Baidu Search Comparison in Perfume Industry in 2019



	Foreign designer perfume	Foreign niche perfume	Domestic perfume
Top searched	CHANEL DIOR Jo Malone	Diptyque Serge Lutens Creed	Scent Library Boitown Fenshine
Top rising	LOEWR +27% LOUIS VUITTON +21% CELINE +27%	Le Labo +50% Acqua Di Parma +47% L'Artisan Parfumeur +47%	Boitown +96% Barrio +76% Vivinevo +47%


Boitown was the only local brand thrusting into the top 10 selling brand lists in the last two years of Tmall Double 11 Shopping Festival.

Top 10 Selling Perfume Brands during the Tmall Double 11 Shopping Festival

2020	2019
NO 1. GIORGIO ARMANI	NO 1. Boitown 
NO 2. Boitown 	NO 2. Jo Malone
NO 3. Jo Malone	NO 3. Dior
NO 4. YSL	NO 4. Tom Ford
NO 5. Tom Ford	NO 5. Atelier Cologne
NO 6. Bvlgari	NO 6. YSL
NO 7. Atelier Cologne	NO 7. Bvlgari
NO 8. Calvin Klein	NO 8. Anna sui
NO 9. Versace	NO 9. Elizabeth Arden
NO 10. Dior	NO 10. Hermes

[Data source: ChemLinked]

Comparison of representative brands

	JO MALONE LONDON	BOITOWN 冰希黎 
Tmall flagship store followers	3.74m	1.53m
Top 3 selling product (total sales since launch)	Wild Bluebell 114,116 units Body wash 114,116 units English Pear & Freesia 48,446 units	Boitown by Boitown 1,591,114 units Diva Charisma 680,431 units Acqua Pour Homme 300,142 units
Weibo official account followers	370,000	750,000
Little Red Book notes	130,000+	9,700+
Is there a WeChat shopping applet?	Yes	Yes
Spokesperson	Liu Haoran (actor, 1997, @刘昊然, 32.08m followers)	Wu Xuanyi (idol, 1995, @吴宣仪, 24.37m followers)

[Deadline for statistics: April 15]

Competitiveness analysis:

- Boitown is a third Jo Malone's price, and its best-selling product has been sold more than 1 million units, implying that there is a growing market for affordable domestic perfumes.
- Both brands have invited post-95s celebrities to endorse for their products, reflecting the idol economy's appeal to the young consumer group.

PERSONAL CARE

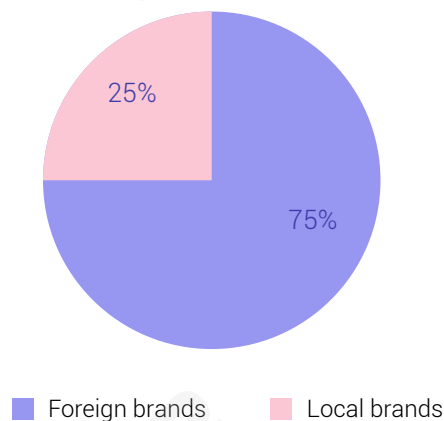
Key takeaways

- International brands dominate this category, and most brands are from P&G.
- New domestic personal care brands are springing up and gaining popularity by innovative product and package designs.

Consumer preference

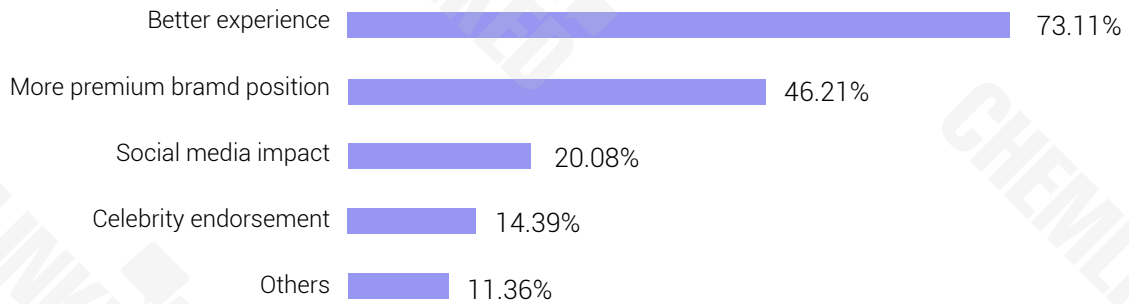
75% of respondents are inclined to opt for foreign personal care brands.

Local vs. Foreign Perfume Brand Purchase Preference



Like perfume, respondents are more likely to buy foreign brands for a better experience (73.11%), more premium brand position (46.21%), and social media impact (20.08%).

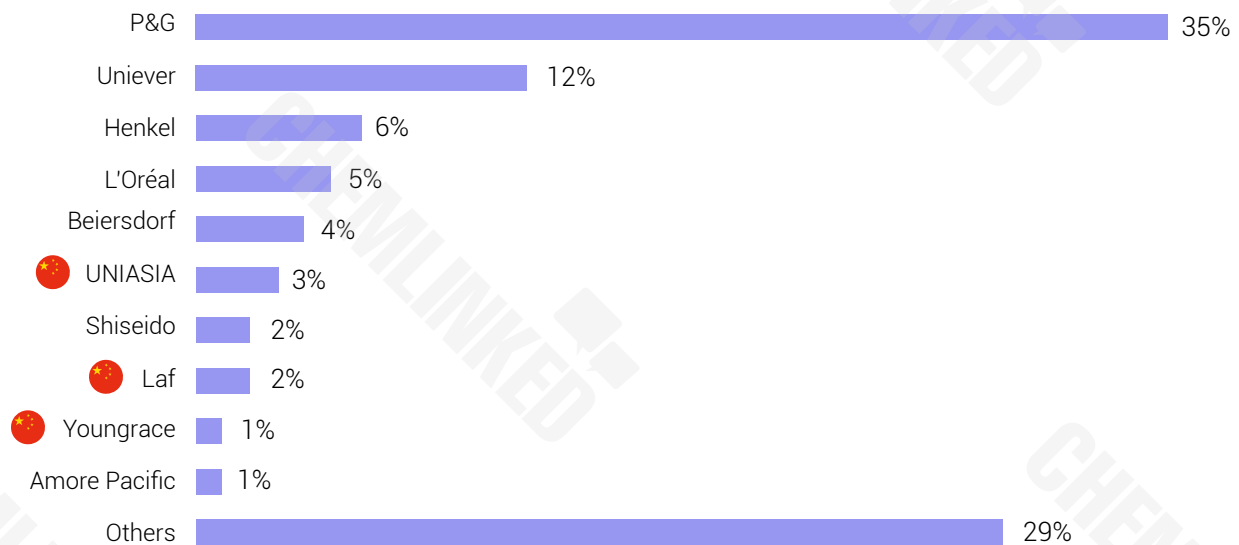
Reasons for Choosing Foreign Personal Care Brands



Competitive landscape

International brands dominate China's personal care industry, and the monopoly situation expects to continue for a long time.

China's Personal Care Market Share in 2018



[Data source: huaon.com]

Foreign brands, most of which belong to multinational groups P&G and Unilever, occupy most top-selling seats during the Tmall Double 11 Shopping Festival. Chinese new brand Triptych of Lune (founded in 2016) shows promising growth potential.

Top 10 Selling Body Wash & Hair Care Brands during the Tmall Double 11 Shopping Festival

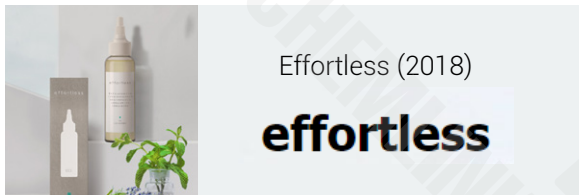
Body wash

Hair care



	2020	2019	2020	2019
NO 1.	Safeguard	Safeguard	Head&Shoulders	Head & Shoulders
NO 2.	LUX	Kuyura	VS	VS
NO 3.	Dove	Dove	Pantene	Pantene
NO 4.	Kuyura	LUX	CLEAR	Adolph 
NO 5.	Olay	Olay	Shiseido	Triptych of Lune 
NO 6.	Dettol	Little Dream Garden 	REJOICE	CLEAR
NO 7.	Walch 	Walch 	Triptych of Lune 	REJOICE
NO 8.	Femfresh	Dettol	Adolph 	Dove
NO 9.	Opal 	The Face Shop	Selsun	Shiseido
NO 10.	Kustie 	Tesori D'oriente	Moroccanoil	LUX

[Data source: ChemLinked]

New domestic personal care brands



Comparison of representative brands

		
Tmall flagship store followers	11.76m (P&G flagship store)	1.53m
Top 3 selling product (total sales since launch)	Whisper liquid sanitary napkin 9,369,100 units Tide laundry detergent 4,402,100 units Head&Shoulders shampoo 4,292,600 units	Fluffy hair shampoo 993,720 units Oil-control shampoo 745,592 units Mousse shower gel 421,546 units
Weibo official account followers	1.44m	20,000
Little Red Book notes	10,000+	10,000+
Is there a WeChat shopping applet?	Yes	Yes
Spokesperson	Wang Yibo (idol, @UNIQ-王一博, 38.2m followers)	/

[Deadline for statistics: April 15]

Competitiveness analysis:

- Head&Shoulders has been a household name for Chinese consumers, and some may even mistake it for a domestic brand. Although there emerged several domestic brands which achieved brilliant results through online marketing, it's not going to happen overnight for these new brands to take over the national status of the established ones.
- Besides, the domestic brand Triptych of Lune is suspected of copying the design of the foreign customized hair care brand Functional of Beauty, and passing off as a foreign brand, reflecting the lack of indigenous innovation and brand confidence of domestic brands.

Helping You Win in China

End-to-end China Market Entry Lifecycle Management



WHO WE ARE



We provide **one-stop e-commerce solutions** for Chinese market covering market research, digital marketing, e-commerce operation, IT solutions, and brand management.

We have supported brands establish and grow their online sales across a variety of sectors such as **Food & Beverage, Cosmetics & Person Care, Pet Products, Kid and Mother products.**

As a strategic partner trusted by international brands, our mission to provide diversified and precise services for overseas brands entering China, cultivating the brand value, and achieving sustained sales growth.

WHAT WE PROVIDE



Market Research

Market Investigation; Industry Report; Strategy Consulting



E-commerce Store Setup & Operation

Open an Online Store; Channel Matchmaking; Operation & Management



KOL/KOC Campaign

Livestreaming e-commerce; Endorsements; Offline Events



Brand Localization

Company Establishment; Trademark & IP Registration; Brand Image Design



Social Media Marketing

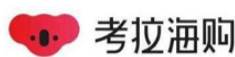
WeChat; Weibo; Red Book; TikTok etc.



Technology Solutions

Baidu SEO; WeChat Applet

OUR PARTNERS



WHY CHOOSE US

- ✓ One-stop, all-in-one market entry solution
- ✓ Customized localization marketing strategy
- ✓ High Efficiency and Quality

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PART 4

CONCLUSIONS AND IMPLICATIONS

Conclusions

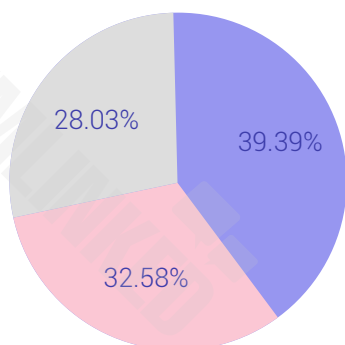
The survey shows that perfume, skincare products, health food, makeup, baby food (including milk powder, complementary food, and snacks), and personal care are the sectors in which respondents are more willing to buy foreign brands. Foreign brands have an absolute advantage in these categories. In the pet food sector, foreign brands win by a narrow margin. The UHT milk is the only category where domestic brands surmount foreign brands.

	Foreign	Local
Perfume	86.74%	13.26%
Cosmetics (skincare)	85.98%	14.02%
Health food	79.92%	20.08%
Cosmetics (makeup)	78.41%	21.59%
Infant formula	76.89%	23.11%
Baby food (complementary food and snacks)	75.38%	24.62%
Personal care	75%	25%
Pet food	53.79%	46.21%
UHT milk (UHT white milk and ambient yogurt)	33.33%	66.67%

In the cosmetics sector, **stronger efficacy, more premium brand position, and social impact** are the top 3 factors driving respondents to opt for foreign brands. In the food sector, respondents choose foreign brands mainly due to **better and safer ingredients, brand fame and position, and more scientific formulations**.

It is evident that foreign brands have pulled ahead in brand value building, and they have left a deep impression as a representative of high-end and high-quality life for Chinese consumers. In the food sector, foreign products' ingredients and formulations are competitive edges. In the cosmetics sector, social medial marketing plays an increasingly vital role in driving consumers' decisions.

Most Likely Situation for the Relationship Between Local and Foreign Brands in the Next Five Years of Market Competition



- Consumer's awareness of product country origin would diminish, and they would pay more attention to product quality and cost-effectiveness
- Chinese people are more willing to choose Chinese brands and domestic brands occupy more market
- Foreign brands still have their advantages in innovation and creativity, and they are on a par with Chinese brands with their respective advantage

Implications

① The rise of new local brands, the booming China Chic tide (国潮), and Chinese consumers' willingness to purchase more local brands in the future have brought substantial potential for local brands. Intensified competition from local counterparts put pressure on foreign brands. Therefore, foreign brands should take the Chinese market more seriously by carefully understanding Chinese culture and Chinese consumers' habit. The time when Chinese consumers pursue international brands unconditionally and blindly has passed.

② Foreign brands should get to grips with the online channels and digital ecosystem when strategizing marketing and branding plans because online marketing has been proven to be an effective method to create word of mouth and build up hype around a brand. A large proportion of new domestic cosmetics brands rely on online marketing and gain quicker recognition. Cooperation with KOL is the most common marketing modes.

③ Foreign brands would lose out by politicizing business in China. The misguided and baseless boycott of Xinjiang cotton has put foreign brands which heavily depend on the Chinese market, including H&M, Adidas, and Nike, under fire. There's no room for compromise when it comes to national dignity for Chinese people, especially the young generation, who have a stronger sense of national pride than their parents.

④ China is always committed to opening to the world. Although the government has proposed the new economic development pattern of "dual circulation," it is by no means a closed domestic loop. The survey also embodies that Chinese consumers are more receptive to foreign brands in some categories that can lead them to a better life. There is no need to worry about state-level policy obstacles.

Acknowledgements

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