

COSMAX



全球
新锐品牌
新品
开发分析

COSMAX

**GLOBAL
INDIE
CULTURE**

**BEAUTY
MARKET**

**INDIE
BRAND**





MARVEL STUDIOS



CAPTAIN MARVEL

主角

Captain Marvel 2019
惊奇队长 2019
女性超级英雄为主角



导演

Anna Boden
& Ryan Fleck
安娜·波顿和瑞安·弗雷克
独立电影导演出身



作曲

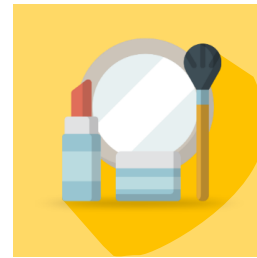
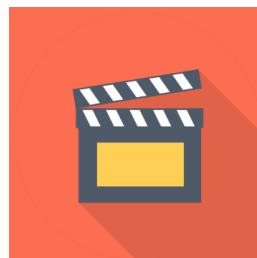
Pinar Toprak
MCU首位土耳其出身
女性作曲



INDIE 独立

Indie 来源于英文 independent

制作过程独立自主，不通过商业机构直接的投资实现融资，不以牟利为第一目。
小制作、低成本、技术手段的简化是它极其现实的标志



NEW
GENERATION

新消费者

TASTE
SEGMENT-
TATION

趋向细分化

QUALITY
UPGRADE

品质升级

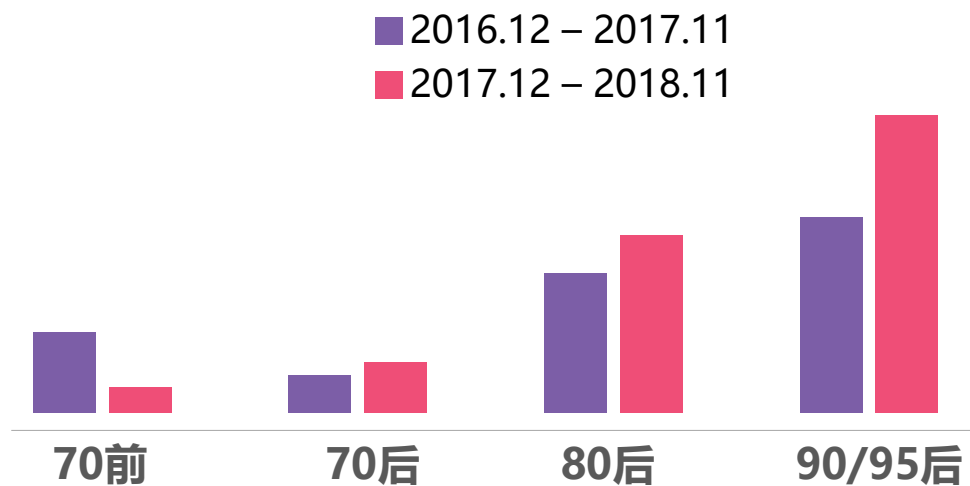
HYPER-
MODERN

超现实

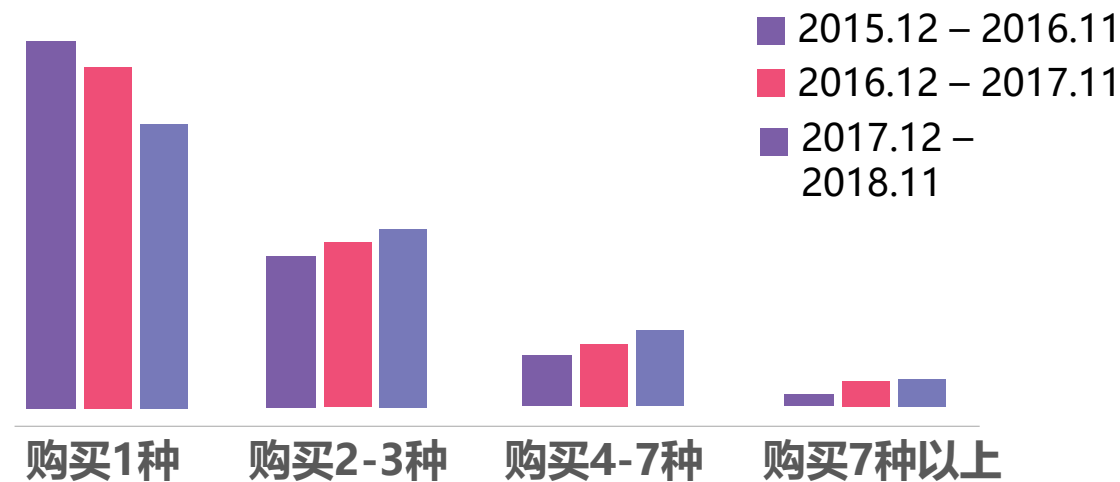
	Maturists	Baby Boomers	Generation X	Generation Y (Millennials)	Generation Z (Millennials)
出生时代	~1945	1946-1964	1965-1980	1981-1994	1995~
2019的年龄	74岁以上	55~73	39~54	25~38	0~24
人口(2016)	0.3bn	1.1bn	1.5bn	2bn	2.4bn
人口占比(2016)	5%	15%	20%	27%	32%
경험经验	第二次世界大战 世界经济恐慌 种族歧视 固定的性别角色 核心家庭 电气用品	冷战 战后婴儿潮 动荡的60年代 阿波罗登月 青年文化 以家庭为主导的生活	冷战结束 柏林墙倒塌 首款电脑亮相 初期移动手机 离婚率增加	9.11 恐怖袭击 入侵伊拉克 社交媒体 多媒体网络的发达 Google Us	经济衰退 移动设备 自制媒体 (抖音) AI 面向全球
对于工作的态度	为了生活	集体主义	专业化能力培训	与组织共事但不是为组织工作	组织和pop-up business之间灵活流动

NEW GENERATION

2016.12 – 2018.11
天猫国际不同年龄段年
人均消费金额同比增速



2015.12 – 2018.11
购买不同类型数量的
90/95S消费者人数占比



数据来源: CBNDATA消费大数据

NEW GENERATION

2018年中国70S/80S/95S 品牌选择观念



某个品牌用习
惯了之后，
继续回购
TGI:112.0



我会研究需要购买
的产品， 选择不同
品牌的明星产品
TGI:142.9



喜欢尝试
网红品牌和
新品
TGI:129.1

来源：艾瑞iClick调研2018年3月调研数据，95人群，N=1066；80人群，N=199；70人群，N=101。

2018年中国95S感兴趣的品牌 会关注的活动



56%
折扣特卖



32.7%
发布新品

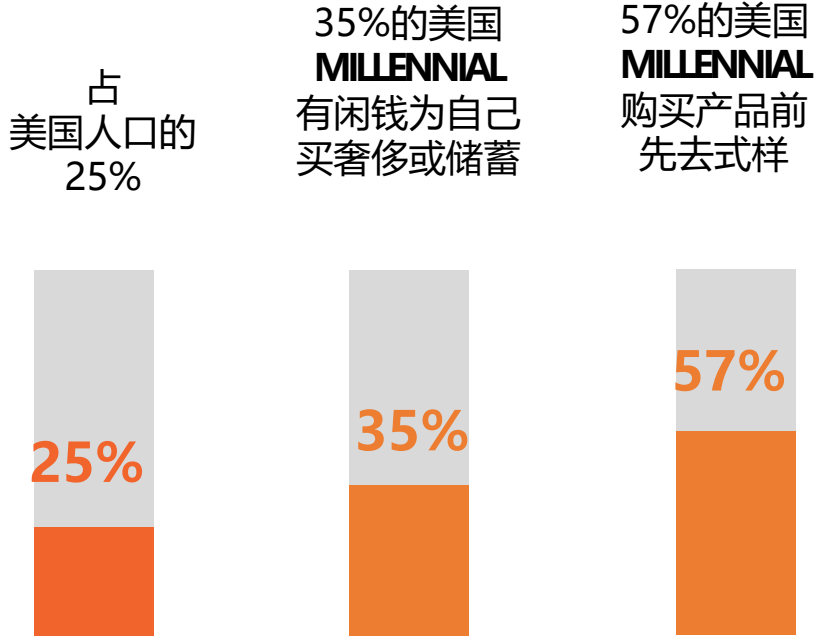


30.5%
产品试用

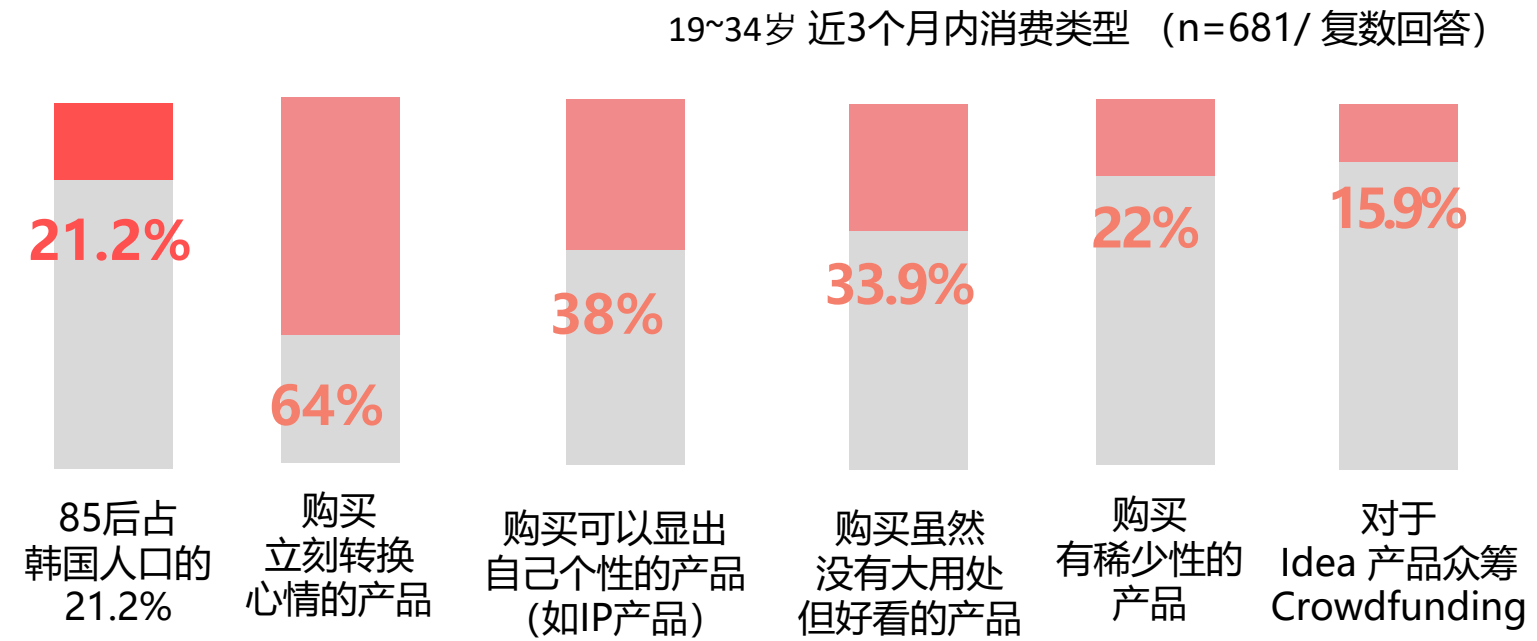
来源：艾瑞iClick调研2018年3月调研数据，95后人群，N=1066。

NEW GENERATION

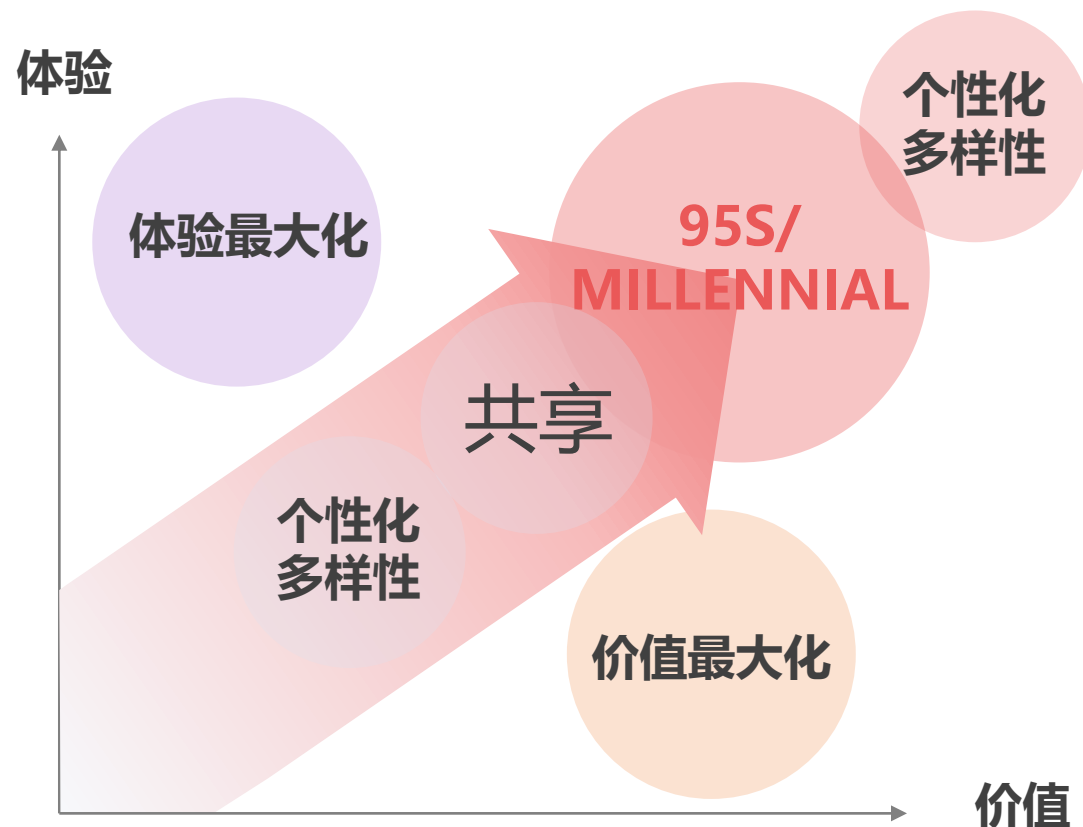
MILLENNIAL



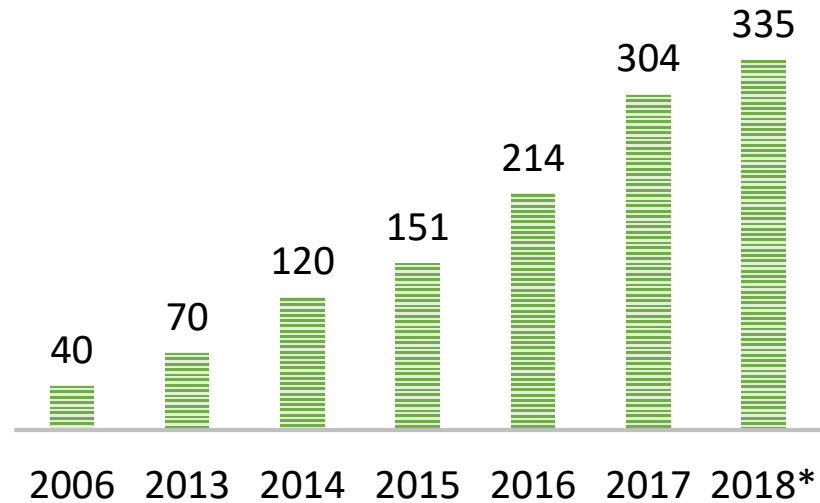
MILLENNIAL



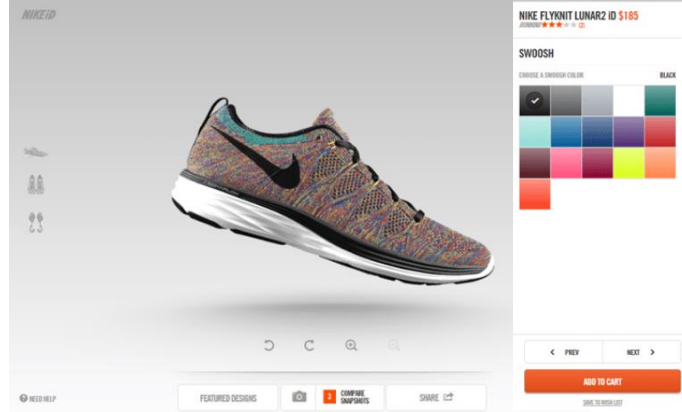
NEW GENERATION



TASTE SAGMENTATION



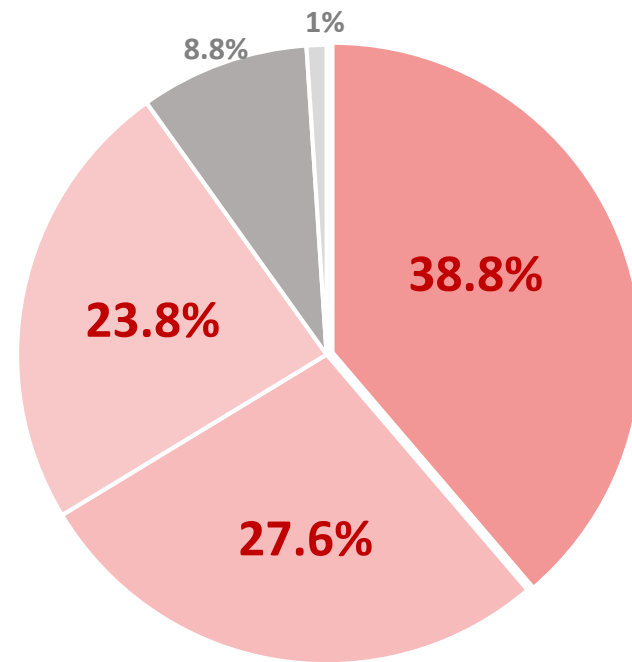
TASTE SAGMENTATION



QUALITY UPGRADE

GLOBAL
INDIE
CULTURE

消费者对
Made in CHINA的想法



- 中国制造业发达了, MADE IN CHINA 产品质量很不错
- 中国人购买国货很正常
- 性价比比较高, 价格便宜质量也还好
- 没有特别的感受
- 品质不好, 不想买

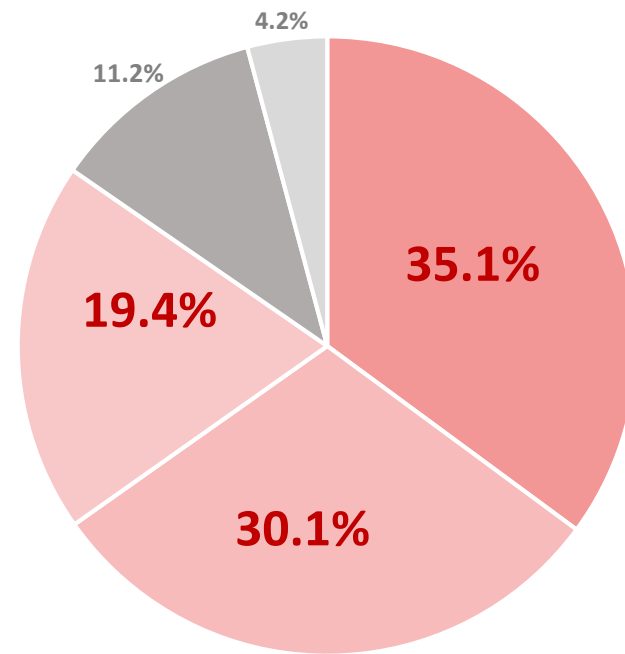
调查中国科丝美诗员工769人

GLOBAL
INDIE
CULTURE

QUALITY UPGRADE

GLOBAL
INDIE
CULTURE

消费者对
Made in CHINA的想法



- 中国是制造业大国，国际品牌在中国生产很正常
- 如果能够保证国际品牌的生产水准和技术，中国生产也可以
- 看重品牌价值，生产地无所谓
- 买化妆品从来没特意看过生产地
- 国际大牌在中国生产，感觉失去了品牌的信赖

调查中国科丝美诗员工624人

GLOBAL
INDIE
CULTURE

HYPER-MODERN

GLOBAL INDIE CULTURE



1. 韩国

96%



2. 新西兰
澳大利亚

93%



3. 瑞典

92%



4. 加拿大

91%



5. 美国

89%



GLOBAL
INDIE
CULTURE

HYPER-MODERN

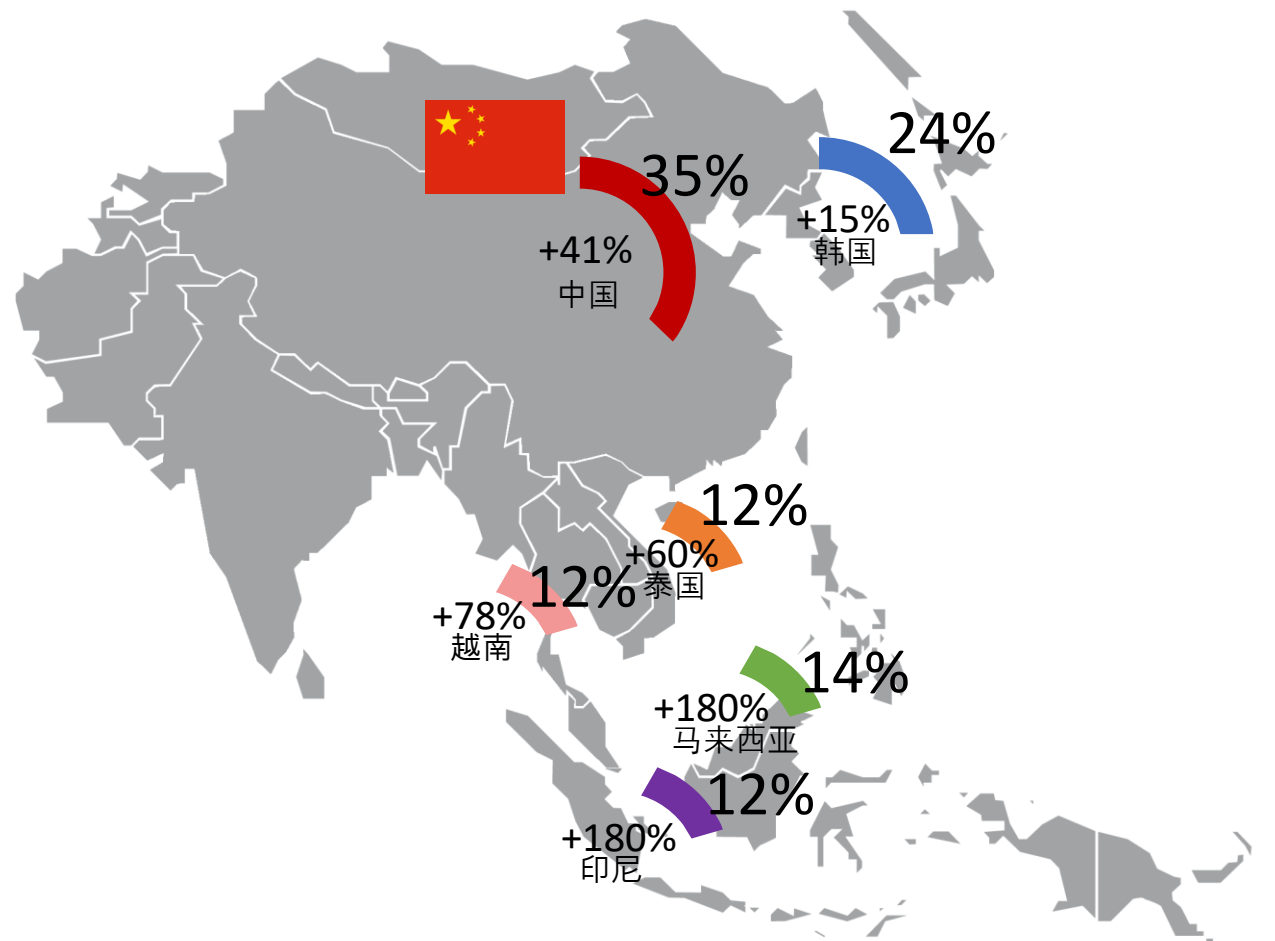
GLOBAL INDIE CULTURE

GLOBAL
INDIE
CULTURE

THE SCIENCE OF KOREAN BEAUTY

线上购买
比重%

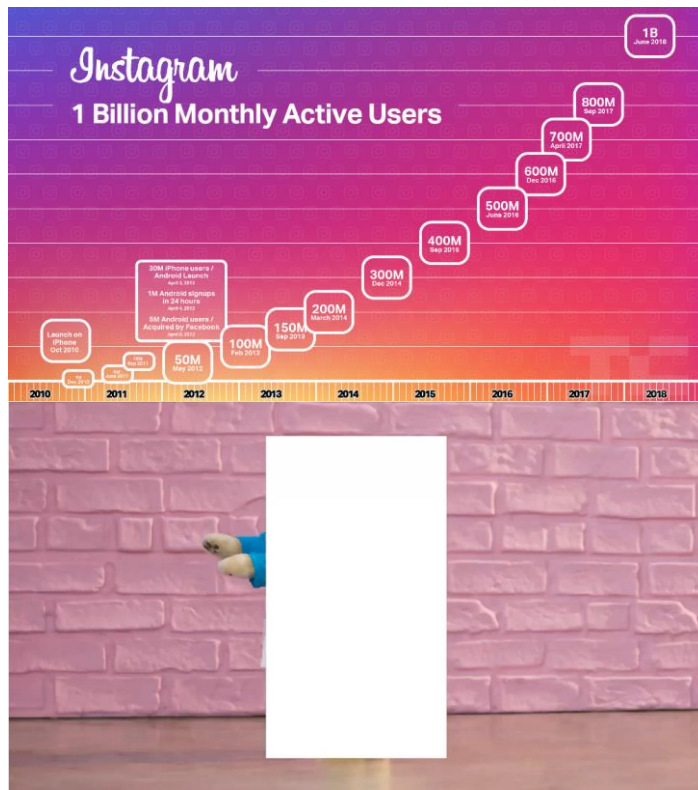
线上成长率%
18 vs. 17



COSMAX

HYPER-MODERN

GLOBAL INDIE CULTURE



Micro-influencers vs Celebrities

Measure the Estimated Cost per Instagram Post, Average Engagement Rate and Estimated Media Value per post for Micro-influencers vs Celebrities. Who delivers the highest engagement rates and ROI? This tool can help you estimate.

Influencermh



12 posts
6,408 followers
7,315 following

Estimated Cost Per Post
\$49.34 - \$82.24

Engagement Rate
7.36%

kimkardashian

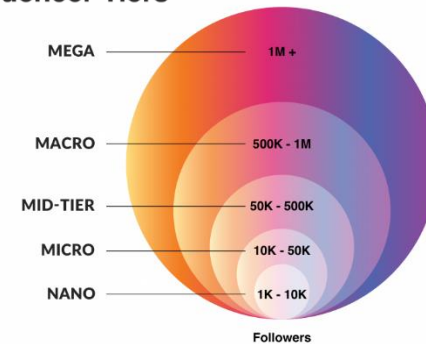


4,069 posts
105,818,067 followers
113 following

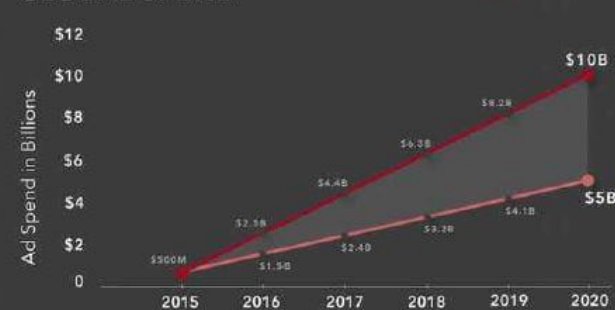
Estimated Cost Per Post
\$158,077 - \$263,462

Engagement Rate
1.69%

Instagram Influencer Tiers



INFLUENCER MARKETING GLOBAL SPEND



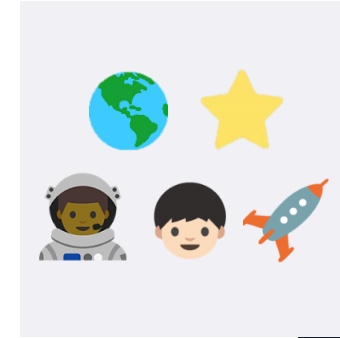
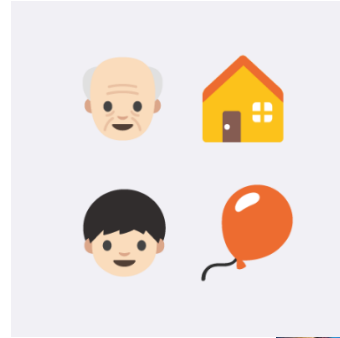
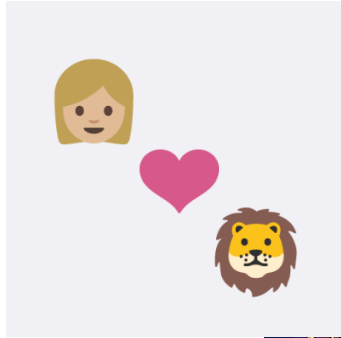
HYPER-MODERN

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CULTURE



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CULTURE

HYPER-MODERN

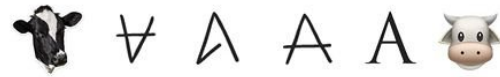


GLOBAL INDIE CULTURE

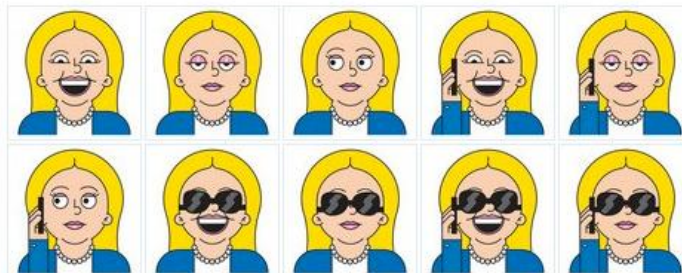
GLOBAL
INDIE
CULTURE

HYPER-MODERN

腓尼基字母的‘牛’ → A



2016美国大选参选人
HILLMOJI: Hillary + emoji



伏特加的
表情符号
版本



Emoji Use on YouTube, at a Glance

As told by comments on the 10,000 most popular YouTube videos¹

5x
more happy faces than sad

20%
of emojis used were hearts

1.7x
more dogs than cats

Most Popular Emojis

Faces	Gestures	Food + Drink	Animals
1. 😍	1. 👍	1. 🍷	1. 🐶
2. 😂	2. 🙌	2. 🍰	2. 🐱
3. 😊	3. 🙏	3. 🍷	3. 🐰
4. 😭	4. 🙌	4. 🍷	4. 🐱
5. 😊	5. 💪	5. 🍷	5. 🐍

¹Among the top 10,000 most-viewed videos on YouTube. Emoji genres determined by Unicode: <https://unicode.org/emoji/charts/full-emoji-list.html>

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INDIE
CULTURE

**BEAUTY
MARKET**

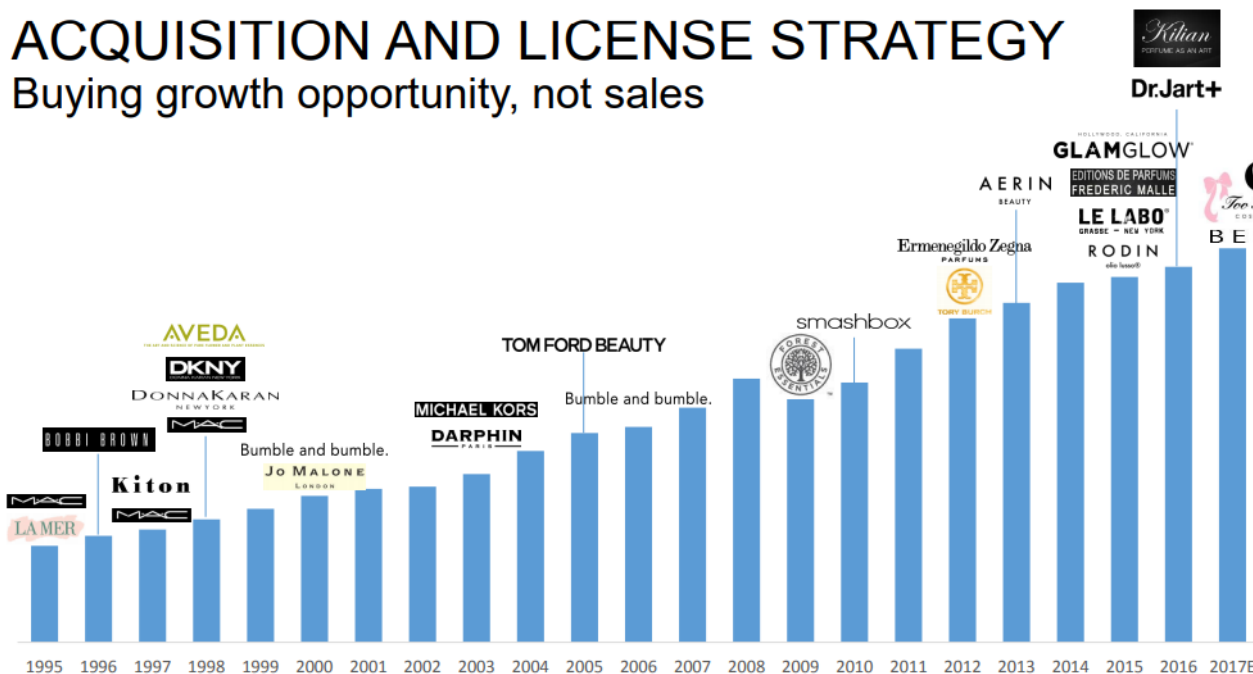
INDIE
BRAND



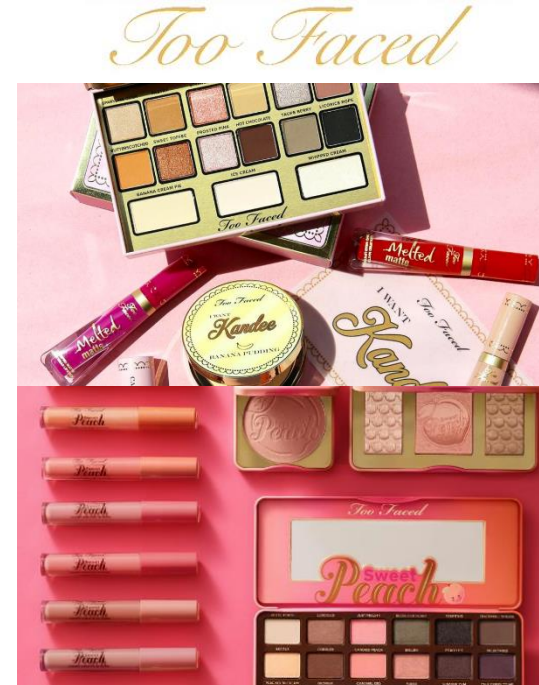


ACQUISITION AND LICENSE STRATEGY

Buying growth opportunity, not sales



Estee Lauder 收购 too faced
两位化妆师开创的彩妆品牌，
大胆地采用颜色。
外包装女人味十足，
又可爱又独一无二的品牌风格。



BEAUTY MARKET

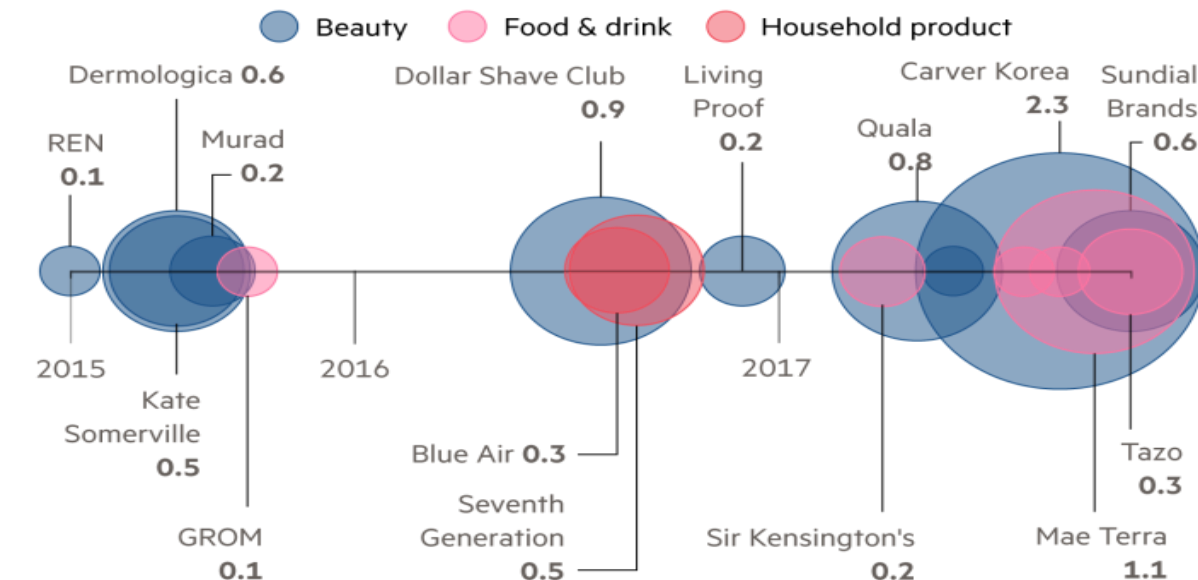


BEAUTY MARKET



Unilever's cornucopia of bolt-on M&A

Estimated deal value (€m)



Does not include all 18 companies

Source: Jefferies

© FT



BEAUTY MARKET

联合利华 收购 Schmit' s Naturals

Schmidt' s Naturals 天然香体剂的原料来自植物和矿物质，其配方曾获过大奖，产品已经从香体剂扩展到了香皂和牙膏等产品。



schmidt's

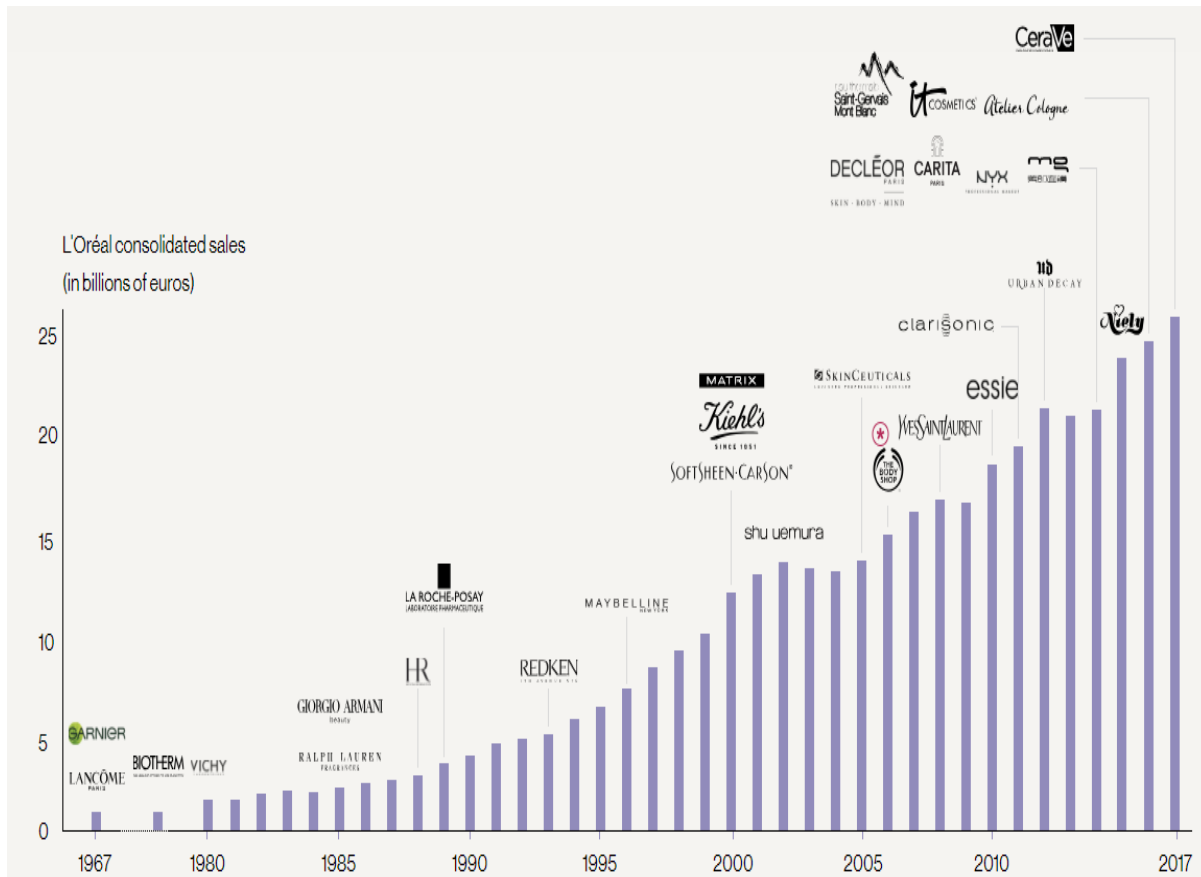


BEAUTY MARKET

L'ORÉAL



BEAUTY MARKET



欧莱雅 收购 IT Cosmetics

IT Cosmetics 产品是由业内领先的
整形外科医生和皮肤病专家研发的美国高
端彩妆护肤品牌!



BEAUTY MARKET



IndieBeautyExpo



INDIE BEAUTY EXPO

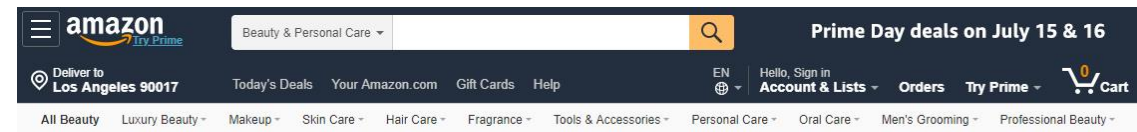
Wed., August 21, 2019
2pm-8pm

Thurs., August 22, 2019
9am-5pm

IBE is the world's largest exposition of independent brands and the definitive destination for beauty entrepreneurs and independent innovators.

Reserved for industry and trade professionals (buyers, press, influencers, beauty entrepreneurs/professionals, trade professionals, solution providers, investors, etc.)

AMAZON INDIE BEAUTY



Indie Beauty

Discover new, curated independent beauty brands and their stories.



INNOVATIVE	COLOR	SKINCARE	NATURAL
GLOBAL	HAIR	FRAGRANCE	MEN'S

Mia Del Mar

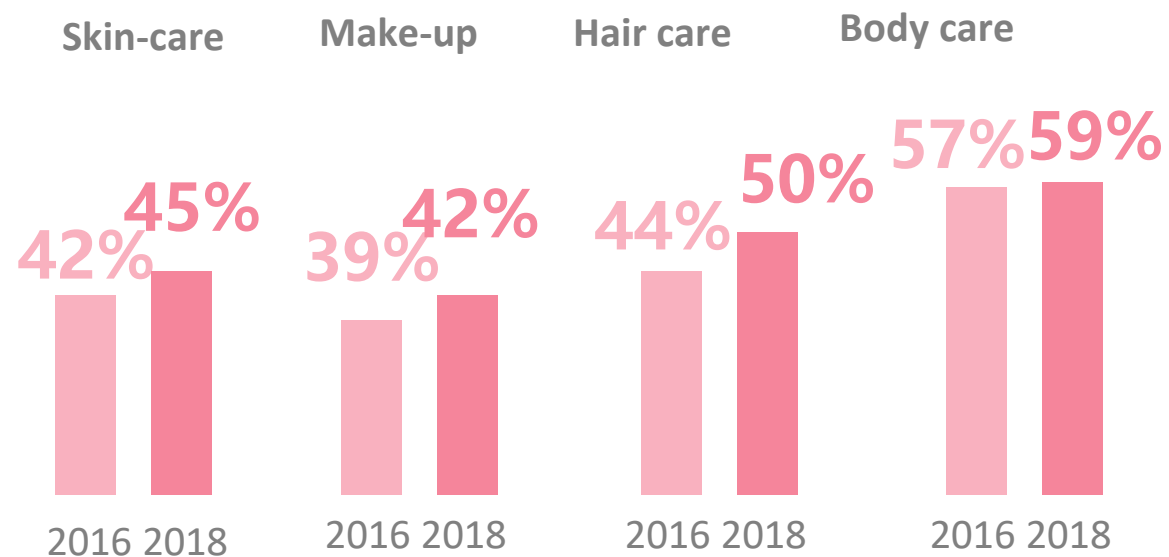
Mia Del Mar's high quality products are free of parabens, sulfates, and phthalates. Their exotic color options and long-lasting formulas allow your complexion to glisten and be irresistible.

► Explore Mia Del Mar

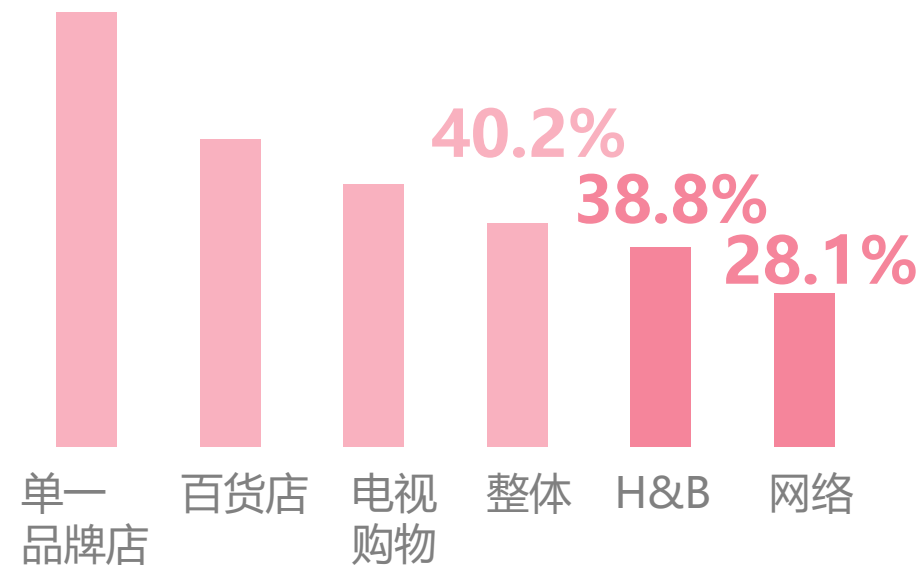




韩国中小品牌的影响力变化 2016 vs 2018

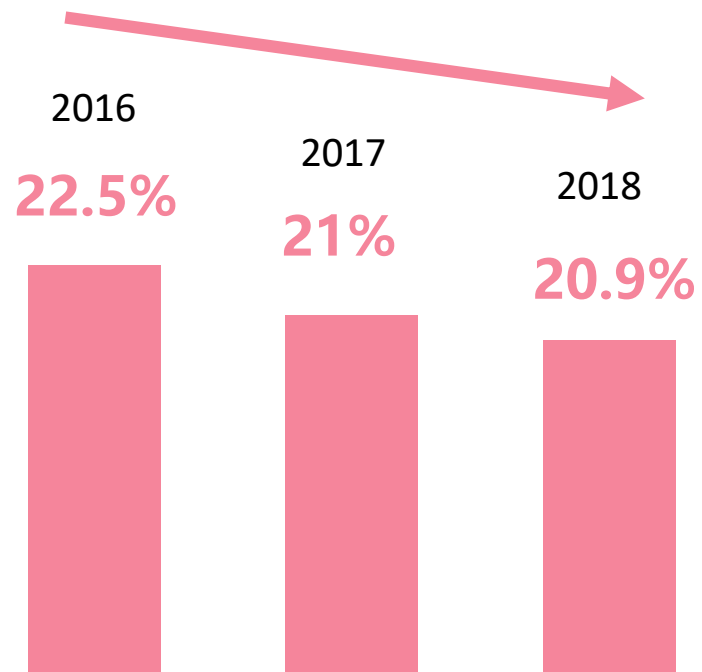


韩国top10 品牌的个渠道占有率





TOP 10品牌的市场占有率变化



中国市场内的新锐品牌 2016 vs 2018



COSMAX

GLOBAL
INDIE
CULTURE

BEAUTY
MARKET

**INDIE
BRAND**



TARGET 分析主要 消费群众



INDIE
BRAND



PERFECT DIARY
完美日记

#TRENDY
#FASHION
#NO.1



INDIE
BRAND





JUDYDOLL

JUDYDOLL 橘朵
润色丝滑单色腮红

PRETTY BLUSH PAWDER



INDIE
BRAND



#TRENDY

#CUTE

#COST EFFECTIVE



INDIE
BRAND



INDIE
BRAND



LOVBOD



LOVBOD

#REAL-LIFE

#LOVEYOURSELF

#BODYBRAND



INDIE
BRAND



INDIE
BRAND



Milk
MAKEUP

#TRENDY
#NATURAL
#SELFMAKEUP



**INDIE
BRAND**





#SIMPLE PACKAGE

#FRIENDLY

#INS MARKETING



INDIE
BRAND





INDIE
BRAND



#SATURDAY
#PEPTIDE
#INS FAMOUSE



**INDIE
BRAND**



FOCUS 明确的 品牌方向



INDIE
BRAND





#FANCY

#MAKE-UPSTAR

#BEAUTY-INFLUENCER



**INDIE
BRAND**





#SAHARA-DESERT

#MINIMALISM

#CACTUSSEED



INDIE
BRAND





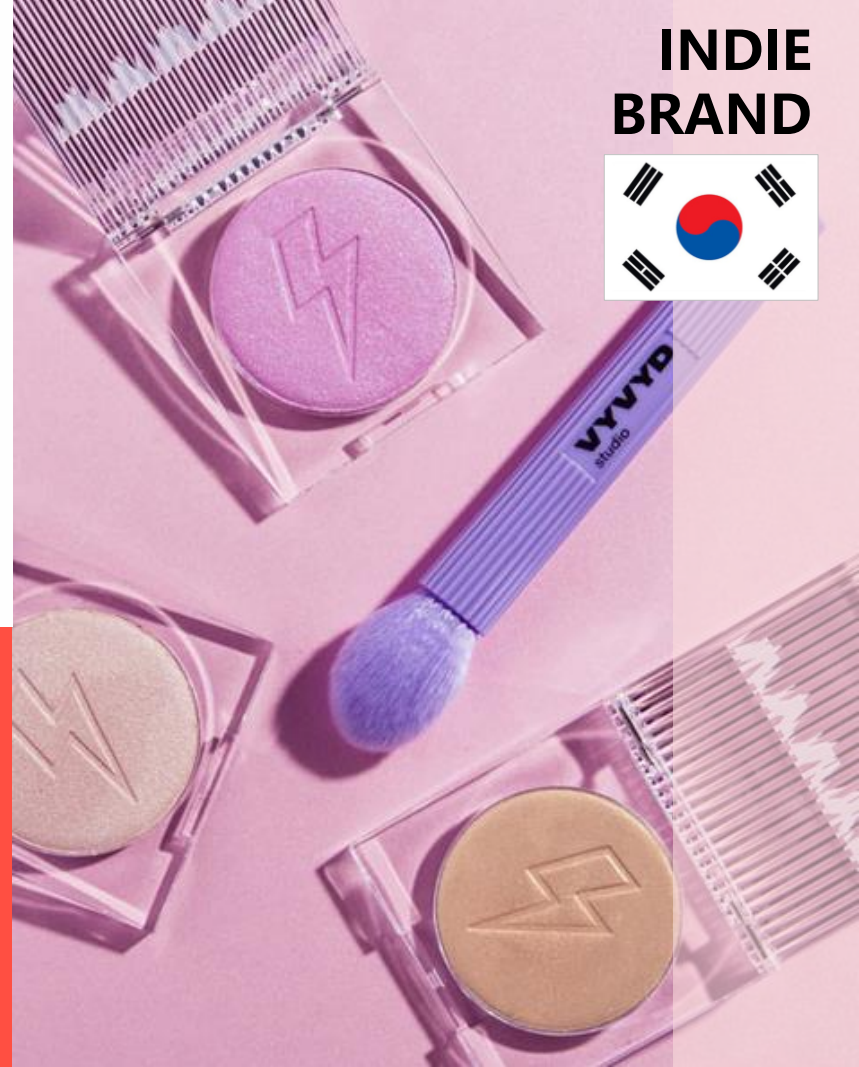
WVVD



No.1	Crystal vinyl
No.2	Diffuse light
No.3	Gold play
No.4	Fantasy trap
No.5	Epic trance
No.6	Acid pop
No.7	Mellow rhythm
No.8	Electro pink
No.9	Rosy voice
No.10	Amber metal
No.11	Cross over
No.12	Mystic groove
No.13	New wave
No.14	Red hook
No.15	Trip hop
No.16	Deep vibe
No.17	Fauve disco
No.18	Royal blues
No.19	Techno ripple
No.20	Sprout funk
No.21	Mineral beat
No.22	Humming
No.23	Glam rock
No.24	Momentary sound



INDIE BRAND



@Pawel nolbert

VYVYD
studio

#VIVID

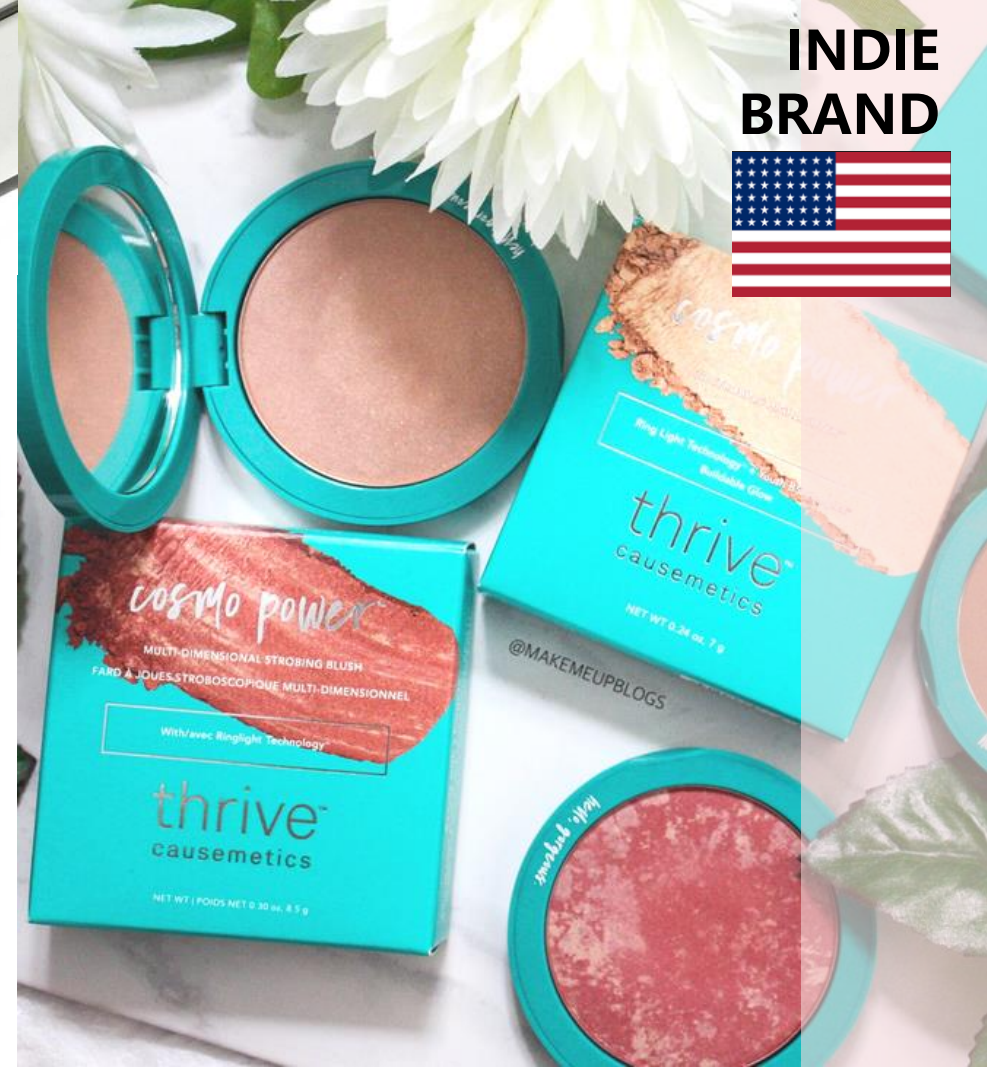
#COLORFUL

#24COLOR



**INDIE
BRAND**





INDIE
BRAND



thrive[™]
causemetics

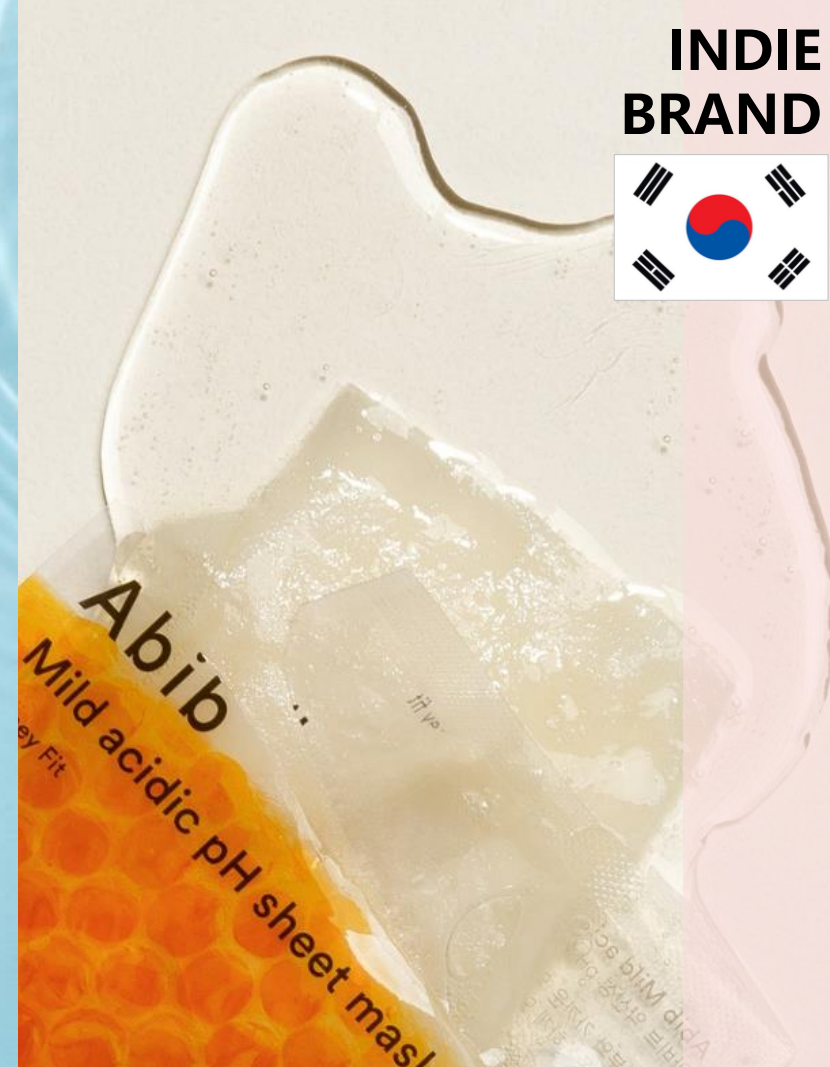
#VEGAN
#HIGH-END
#DONATION



INDIE
BRAND



INDIE
BRAND



Abib

#SIMPLE

#MINIMALISM

#PURE



INDIE
BRAND



INDIE
BRAND



LAKA

#GENDERLESS

#EVERYCANUSE

#PRAGMATISM



**INDIE
BRAND**



DEAR DAHLIA

INDIE
BRAND



DEAR DAHLIA

#ETHICAL

#VEGAN

#PURE



**INDIE
BRAND**



分析研究目标消费者,
了解他们的趋势和生活方式

TARGET

FOCUS

明确的品牌定位/方向/ 颜色,
提高品牌独有的价值

通过SNS等平台接近客户
与消费者沟通并产生共鸣

DIGITAL

COWORK

OEM/ODM公司的合作
提高产品品质提高品牌价值

主要论点

/1

环境的变化

/2

消费主流的变化

/3

合作重要性

全球
新锐品牌
新品
开发分析

主要论点/1

环境的变化

NEW
GENERATION
新消费者

HYPER-
MODERN
超现实

TASTE
SAGMENTATION
趋向细分化

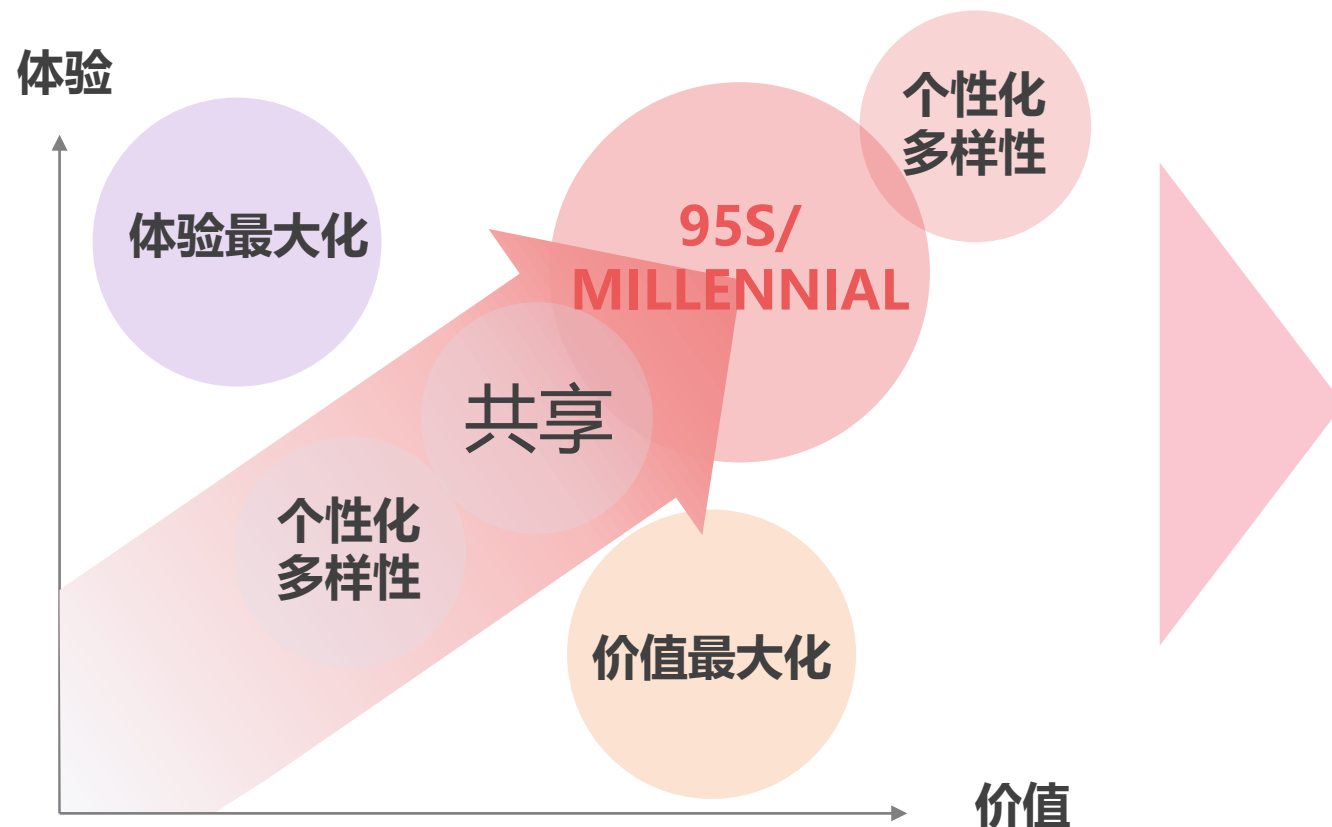
QUALITY
UPGRADE
品质升级



新锐品牌
持续成长

主要论点/2

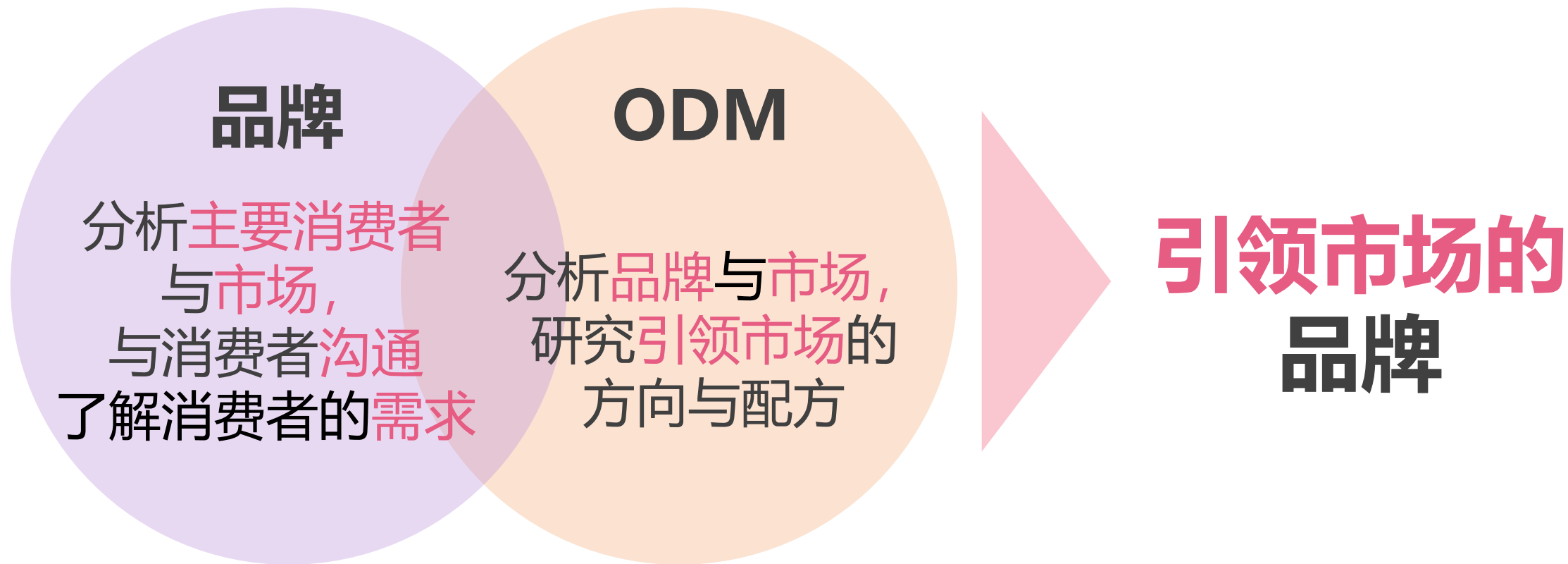
消费主流的变化



互联网的土著人
直观的视觉效果
瞬间的感受
简单又新颖

主要论点/3

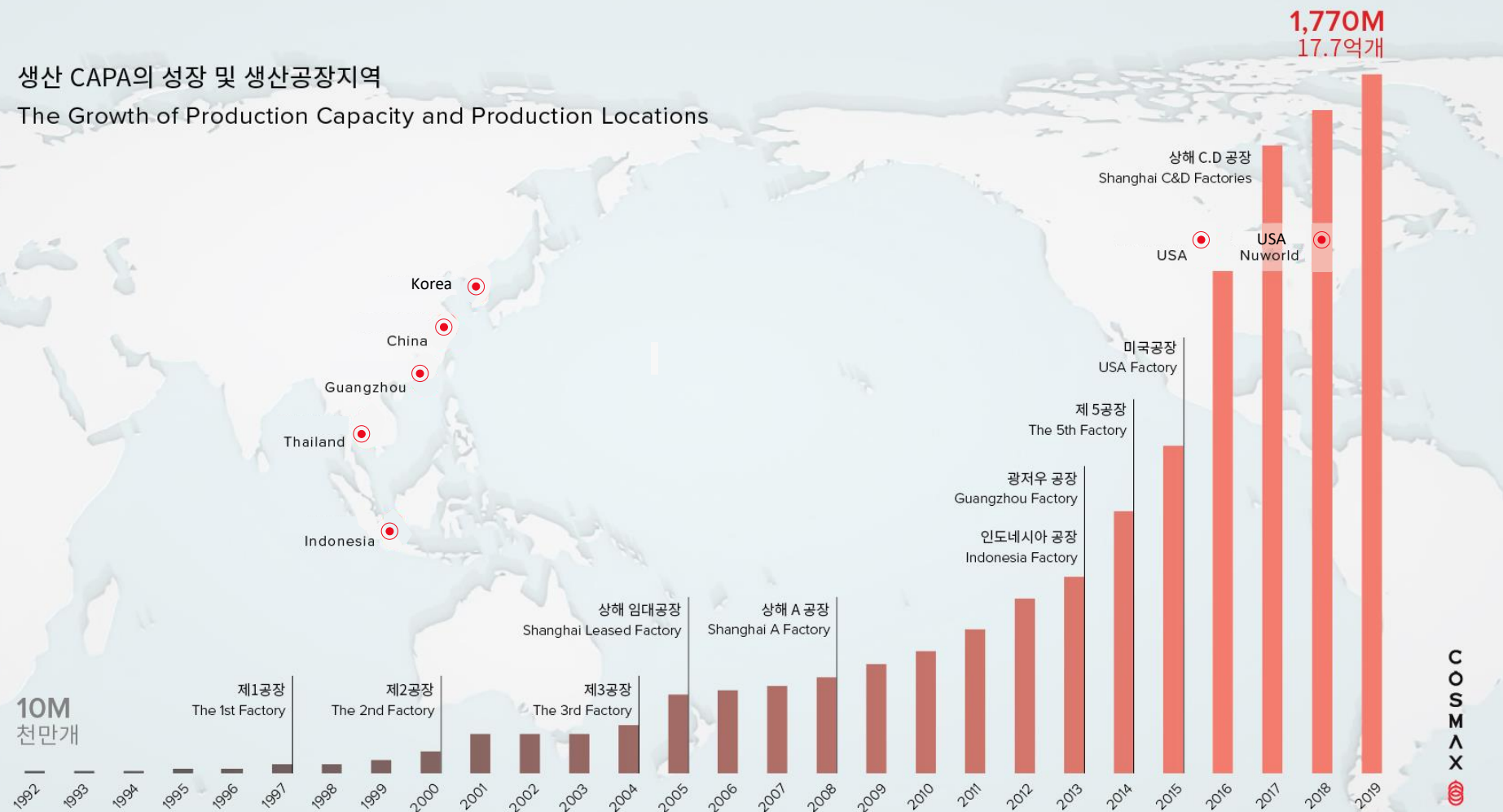
合作重要性



全球 新锐品牌 新品 开发分析

생산 CAPA의 성장 및 생산공장지역

The Growth of Production Capacity and Production Locations



全球 新锐品牌 新品 开发分析

COSMAX



COSMAX
THE SCIENCE OF KOREAN BEAUTY

全球
新锐品牌
新品
开发分析