

CHINAFICATION

A PLAYBOOK FOR NICHE BEAUTY BRANDS TO LOCALIZE FOR CHINA

JUNE 2022





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Our mission is to enable companies to craft their best future self and tackle upcoming challenges. We believe this can only be achieved by encouraging people to innovate and explore new business models. We aim to inspire you by giving you the keys to understanding new markets, consumers and trends.

CHINAFICATION

[chi.na.fi.ca.tion] sophisticating a brand for the Chinese market

As the first beauty market in the world, China has become a critical playground for brands to succeed in. Boosted by e-commerce and Live Streaming, populated by increasingly sophisticated consumers and powerful homegrown brands, crossed through by culturally-specific currents, increasingly decoupled from the rest of the world, the Chinese beauty market calls for more localization than ever before.

Studying C-Bauty brands' specific examples, we discover how they strike cultural relevance and leverage local hot topics to build cult-like followings.

Identifying 5 localization dimensions, we rate 8 international niche brands, before deep diving in their China specific journey and picking out granular cases to illustrate how they adapted and became relevant to China's culture, channels, and consumers.

Through culture, content, community, commerce and collaboration, Chinafication is a key for beauty brands' success.



Rachel Daydou
Partner & China Managing Director





A BRIEF HISTORY OF LOCALIZATION

from specific to localized brands

LOCAL BRANDS SPECIFICATION ERA

> 1950s



Few international brands expand beyond their local borders

Mainly luxury products are exported and acquired by the Happy Few

GLOBAL BRANDS STANDARDIZATION ERA

1950-90s



Lower production costs create a boom of American and European products exports around the world

Cultural exchanges and growing exports' volumes lead to a standardization of lifestyle, products and brands globally

GLOCAL BRANDS ADAPTATION ERA

90-2020s



Developing countries grow purchasing power and demand more dedicated products

International companies settle down and adapt their approach, products to local preferences

CHINA BRANDS LOCALIZATION ERA

2020s +



China rises as the new power in the world economy, Chinese brands premiumize, massively export their products and national pride rises

Cultural specificities, local regulations and o-covid policies lead to decoupling the Chinese market with the rest of the world

FIRST BEAUTY MARKET

immense opportunities that make localization investments worthwhile

NOT ONLY THE LARGEST BUT GROWING BEAUTY MARKET

China's cosmetics market **grew 6-13% YoY between 2009 and 2019** (vs 4.7% globally), showing a strong dynamism.

Cosmetics retail sales amounted to **RMB 498 bn in 2021**.

In Q1 2022, **prestige beauty e-commerce sales revenue increased by 11%** pulled by hair and fragrance, before an overall decrease of consumption in Q2 due to the pandemic.

During the 2022 618 Shopping Festival which generated RMB 582 billion (comparable to 2021), **Skincare ranked as the second category after appliances**.

BOOSTED BY E-COMMERCE & LIVE-STREAMING

23% of China's cosmetics purchases are made online, **growing 20% in 2021**. E-Commerce has become the main channel for new product launches, and we observe a consumer shift away from traditional marketplaces towards **Social Commerce, brand-owned e-commerce and private traffic**.

Live Streaming is a major shoptainment channel for consumers garnering a staggering **68% of total internet users** and 83% of online shoppers.

It is a leading channel for beauty e-commerce sales, with **Beauty Live Streaming views rising by 883%** in 2021, and Luxury beauty brands' Taobao live-stream **GMV growing by 107% in 2021**. It is expected to **surpass RMB 4.9 trillion by 2023**.

WITH INCREASING SOPHISTICATED CONSUMERS

Chinese consumers' interest in beauty is rising dramatically, with **Douyin Beauty KOL increasing by 400%** between 2019-2021.

Promotions & discounts, which led to the first wave of online purchase, is being replaced by interest in brand discovery, New Product Launches and gift sets. For example, the "functional beauty" keyword garners 450k+ notes on RED.

Going beyond skincare, Chinese consumers turn to more **sophisticated categories including hair, perfume and makeup**, and sub categories like eye shadow are booming.

For the first time in 2020, **product efficacy ranked higher in purchase factor** than cost effectiveness.



DECOUPLING FROM THE REST THE WORLD

a decoupling leads to the necessity for China-specific operations



China's has been increasingly following its own economic growth and specific trajectory.

Many concrete factors are leading to a decoupling between China and the rest of world operations, such as import taxes, borders' closing due to the O-Covid policy, consumer protection laws like CSL and PIPL, and more...



This decoupling impacts the circulation of goods, data, investment and people.



As a consequence, brands can't approach China with the same strategy as their other international markets.

They need to develop China-specific strategies, invest independently, and localize their operations to be compliant, relevant and competitive.

SPECIFIC LOCAL FEATURES AND RISING CHINA PRIDE

consumer preferences have developed on their own path

SPECIFIC CULTURAL TRAITS AND REFERENCES

Some content and trends can become viral in minutes, and they develop from unique cultural roots and local references. They represent extremely varied sub cultures and tribes which may rise and fall in minutes.

SENIORS

group activities in
public spaces



SHAMATE

young factory
migrant workers



THE UNSTOPPABLE 国潮 (GUO CHAO: NATIONAL TIDE)

From Made in China to Designed in China, a strong rise in China Pride is leading consumers to choose and promote everything Chinese.

CHINA SPACE RACE

the 3-Body Problem &
China space station



BEIJING OLYMPICS

Eileen Gu



POWERFUL HOMEGROWN BRANDS

your competitors are not the ones you think



POWERFUL

C-beauty players enjoy **solid investment**:

1. Zhuben raised \$50 million in Series A funding in 2021
2. Male grooming brand dearBOYfriend raised tens of millions in Series A
3. Beauty retailer HARMAY raised \$200m from Venture Capital
4. Beauty platform So-Young, raised \$179 million in NASDAQ IPO in 2019.

It gives them a sizeable edge to invest in R&D and customer acquisition.



PREMIUM

The premium segment has taken, on average, **3-4% share of the overall cosmetics market** since 2015 and expected to reach 53% of the market by 2025.

Consumers perception is that C-Beauty brands **have high efficacy, are innovative** and premium.

Brands like Herborist have the **ambition and long-term vision of luxury brands**, to build domestic brands that compete against multinationals and retail products at several hundred RMB.



POPULAR

Domestic brands accounted for **50% of the total cosmetics market in 2020**, a share that has continued to rise in the past 2 years, showing particular strength in the makeup category.

They hit a **78% annual growth rate** in 2020, much higher than the 23% growth rate of cosmetics in general.

Florasis for example embeds Oriental aesthetics. "It is a total package **rooted in Chinese philosophy**, from using natural ingredients to finding the **balance in key elements**".



AGILE

As the market is structuring with new brands, channels, consumer behaviours and macro economic shifts, C-Beauty brands have shown a **strong track record in adapting** their product, marketing and sales quicker than most multinationals.

Lead by **fearless entrepreneurs and boosted by digital & innovation**, they smoothly navigate (some would say: create) market disruptions.

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KEY TAKEAWAYS

LOCALIZATION RECIPES

CHAPTER 1 : C-BEAUTY BRANDS

THE DISRUPTORS

IN THIS CHARTER, WE WILL EXPLORE ...

1.

8 CASE STUDIES

SKINCARE
MAKEUP
FRAGRANCE

2.

5 LOCAL RECIPES

CULTURE
COMMUNICATION
COLLABORATION
COMMUNITY
COMMERCE



FABERNOVEL

[EXPLORE MORE](#)

**BUILD A DIRECT-TO COMMUNITY STRATEGY WITH
CULTURAL AND SOCIAL CURRENCIES.**

CULTURE & COMMERCE

ABOUT THE CASES

We select 8 cases to showcase actionable implications of how
homegrown beauty brands localize the brand and product communication in connection with

LOCAL CONSUMER TRENDS and **HOT TOPICS.**

SKINCARE : UNISKIN

BRAND DEBRIEF

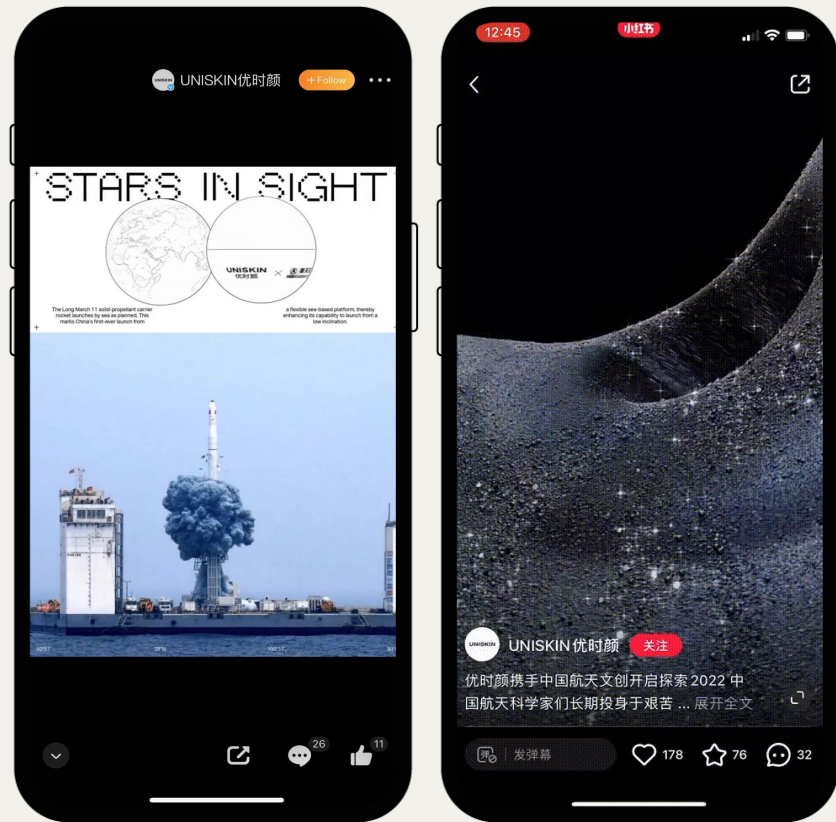
Established in 2016, UNISKIN is a doctor-founded and biotech-driven skincare brand that empowers consumers to discover their inherent skins to feel well and happy about their own skin, aiming to integrate the art of science with the art of aesthetics. UNISKIN first built its offline presence in Little B, H.E.A.T and Lane Crawford to reflect its premium lifestyle brand positioning.

BRAND CULTURE

UNISKIN launched a futuristic packaging for its signature eye cream in partnership with China Aerospace Science & Culture Innovation (CASC) in honor of the explorative spirit in science, which is steeped in the brand mission of UNISKIN. In 2021 China became the country that has accomplished the most space launch missions around the globe. The huge success of the aerospace industry is closely connected with the China pride, which made this collaboration very relatable in this cultural context.

STRATEGIC IMPLICATION

UNISKIN is a prominent young brand with a clear product positioning in the fragmented functional skincare market targeting the ingredient geeks. In the market dominated by multinational players, it carved out a niche and cult following for itself with its innovative ingredients and artistic product packaging, making it a very instagrammable brand with its conceptual visual system.





SKINCARE : PECHOIN

BRAND DEBRIEF

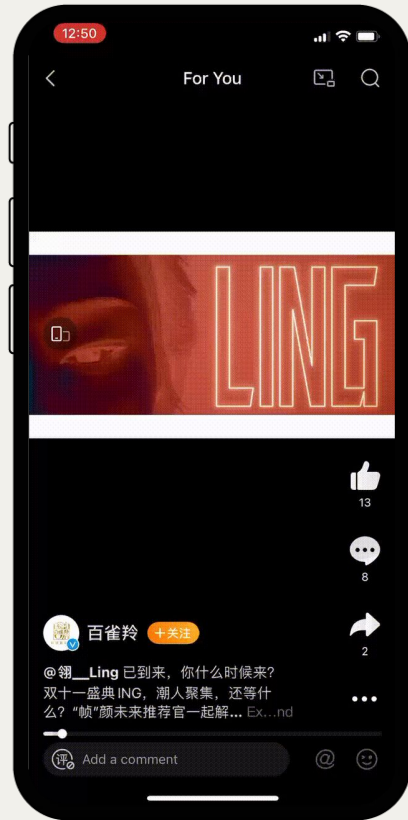
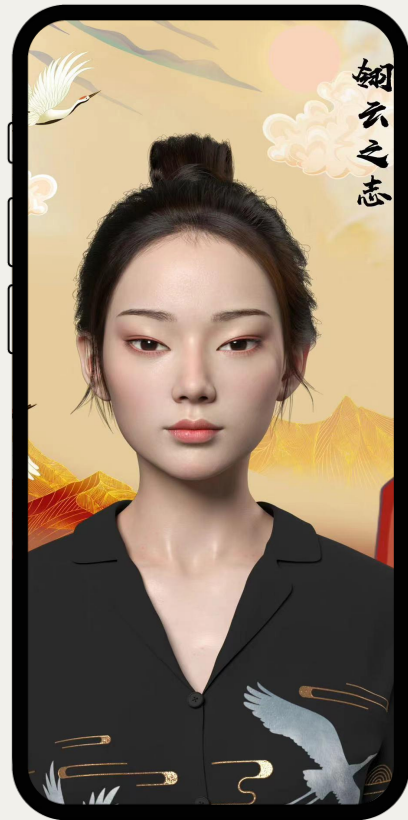
Founded in 1931, Pechoin is the first domestic skincare brand in China. It prides itself on using natural ingredients in the skincare products, a key result of scientific research of Chinese herbs. In recent years, this historical brand is endeavoring to reposition itself with the Guochao (national tide) trend to rejuvenate its brand perception of “Beauty of the East” powered by science & technology.

CHINESE CULTURE

As a local brand with unique history & cultural legacy, Pechoin joined hands with virtual idol LING in line with the Guochao trend to market its anti-aging collection with revolutionary technology. This campaign has well reflected its strategy to be at the forefront of the science and technology in tandem with its cultural heritage. China's virtual KOL industry is expected to grow to \$232 million by 2023, which is the fruition of the co-evolving digital environment – 5G, AI, NFT and Metaverse together with the GEN Z influence in ACG (anime, comics & game) content.

STRATEGIC IMPLICATION

Nostalgia is the new cool. Pechoin is an interesting showcase to prove its prominence in the domestic skincare market – how it refashioned its brand perception with a strong cultural twist, aiming to win the heart & mind of the young Chinese consumers.



MAKEUP : PERFECT DIARY

BRAND DEBRIEF

Founded in 2017, Perfect Diary is the Chinese unicorn brand and one of the most innovative DTC beauty brand with global ambitions. With “Unlimited Beauty” in its core belief, the brand encourages the young generation to explore and celebrate their uniqueness. As a disruptor in the domestic beauty industry, the brand has created a miracle of growth through its omnichannel digital marketing strategy and hyper-fast new product drops.

CONSUMER CULTURE

Perfect Diary partnered with the Tencent gaming IP “King of Glory” to target the subcultural tribes. This collaboration has well attuned the local heritage to the gaming IP – two primary drivers to bolster the brand with creativity and community-building.

An ambitious digital-native brand, Perfect Diary has successfully rolled out new launches with a plethora of IP collaboration including The Metropolitan Museum, National Geographic & COSMO to win the Chinese consumers who are voracious about novelty.

STRATEGIC IMPLICATION

IP marketing is a winning formula for homegrown brands to create a buzz of excitement with new product launches. With the rise in cultural confidence, IP collaboration is arguably a must-have in the brand strategic palette to build the cultural relevance & inclusivity with the young generation of consumers.



MAKEUP : GIRLCULT

BRAND DEBRIEF

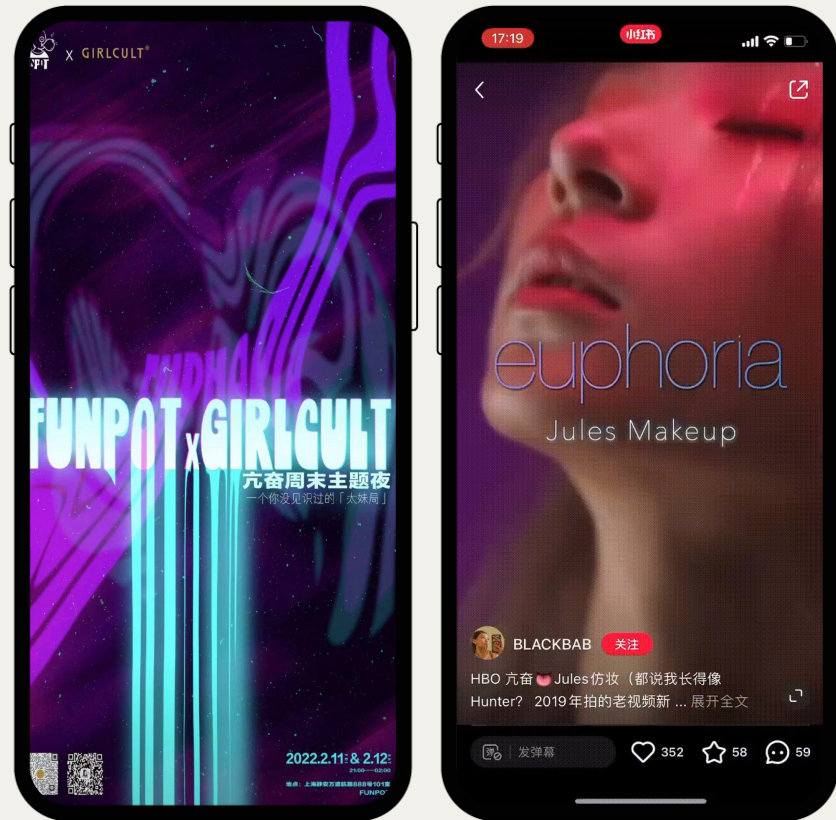
Established in 2018, GIRLCULT is an emerging brand targeting GEN Zers. As a niche C-beauty brand, it is keen to explore different cultural playground to express its eccentric, romantic & mythological persona.

CONSUMER CULTURE

Inspired by the Euphoria hype, the brand collaborated with Funpot (a club) in Shanghai to throw a weekend party where party guests were encouraged to wear the Euphoria-iconic beauty looks, a playful & inviting approach to build a local cohort of young communities with a cultural connection. The Euphoria Effect has become the "IT" factor with rapt attention on the media, landing a growing number of brand ambassadorship, collaborations and campaigns. In recent season, the Euphoria-related topics have quickly garnered over 600K RED posts including the inspirations around makeup, manicures & fashion.

STRATEGIC IMPLICATION

Chinese consumer craze for makeup intimation (仿妆) is becoming one of the most buzzy content format on RED, Douyin & Bilibili. The global beauty trends such as Y2K, E-girl & cyberpunk is having a huge momentum among edgy Chinese Gen Zers (as the super creatives) - brands need to think how to add the "community" ingredient into the creator formula in KOL / KOC marketing.



FRAGRANCE : TO SUMMER

BRAND DEBRIEF

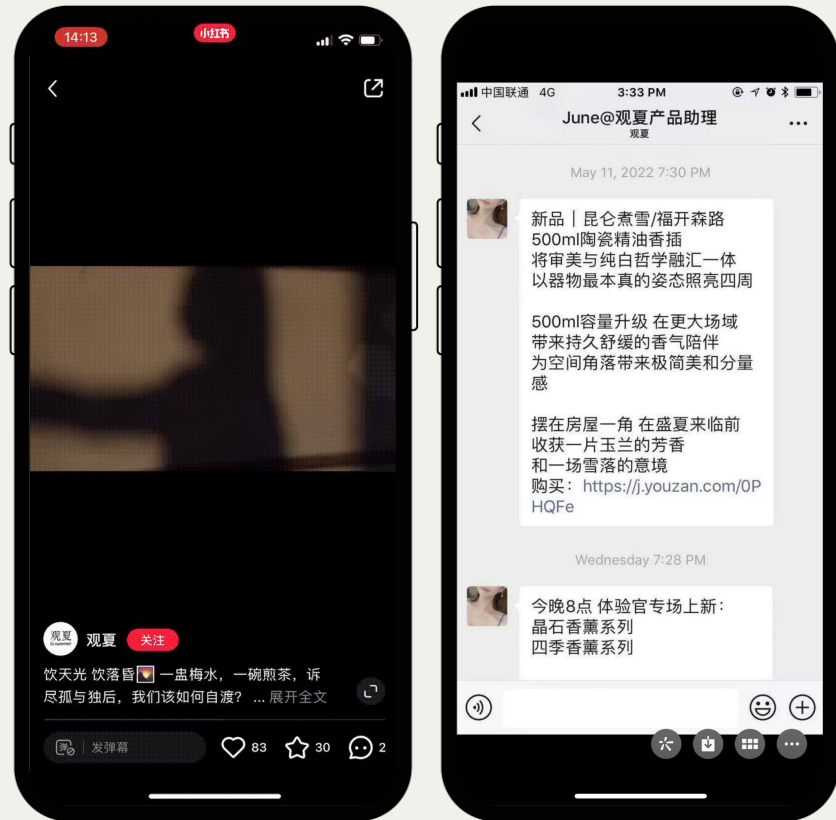
Founded in 2018, To Summer is a homegrown fragrance brand focusing on Easter scents inspired by Chinese heritage & culture. To Summer is now becoming a cult-favorite fragrance brand that celebrates the “New Eastern Modernism”. The successful story of the brand is driven by its unique brand positioning, storytelling and much more.

CHINESE CULTURE

The brand has a subtly unique cultural approach to storytell the fragrance and deliver an immersive olfactory experience for a group of sophisticated niche fragrance lovers. The names, scents and packaging are designed to provide a fragrant inspiration of the Eastern philosophy. Unlike its peers, To Summer is a worldly brand that adopts slow marketing for a success, which sells products only on WeChat Mini Program, RED store & offline store with over 60% of customer retention, largely contributed by its private traffic strategy – a WeChat-centric touchpoint for its KOS June to share pre-sale information and to build the brand affinity in a personalized manner.

STRATEGIC IMPLICATION

Fragrance is an emotional gift. And To Summer is well-versed in crafting the sensorial experience through the cultural lens to build the brand ethereality. The product communication is deeply anchored in its oriental heritage and modernism – a unique juxtaposition that redefines what “Made in China” really means to the modern Chinese consumers.



FRAGRANCE : THE BEAST

BRAND DEBRIEF

Established since 2011, The Beast is a unique and curated online-offline lifestyle retail concept. Originally launched as a new age flower shop, The Beast has since grown into a multi-brand creative house of lifestyle aesthetics.

CONSUMER CULTURE

The Beast is a market leader of launching seasonal limited editions to create social excitement. Recently it launched a limited Spring gift box endorsed by its brand ambassador Jun Gong – a collection that is very aligned with the lifestyle brand positioning to inspire memorable Spring moments. The brand created multi-format assets around its brand ambassador (video & illustration) to market this limited collection.

STRATEGIC IMPLICATION

Outdoor activities such as “glamping” (glamorous camping) is becoming one of the hippest lifestyle among young Chinese consumers. RED as the top-of-mind lifestyle platform, it has officially launched a dedicated brand zone targeting the glamping explores in this camping season. And it has generated more than 3.5 Million posts around the camping topic as of today. The Beast new camping collection has illuminated a creative approach of how to align the product communication with the buzzy consumer trends.



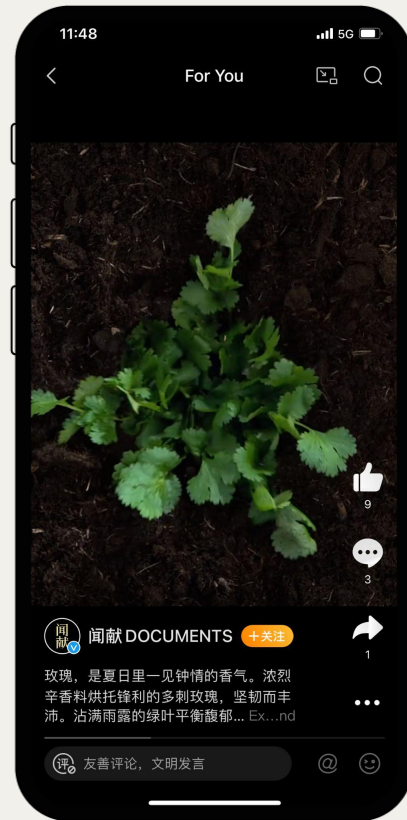
FRAGRANCE : DOCUMENTS

BRAND DEBRIEF

Opened its first flagship store in Shanghai in 2021, Documents is a Chinese avant-garde and niche fragrance brand with premium positioning around the CHANKU (Zen Cool) aesthetics. The brand has strategically collaborated with Givaudan on 6 perfumes, delivering dark, mysterious and yet fascinating cultural and sensorial experience to the Chinese consumers. And the brand is well-known for its transformative fragrances that allow consumers to mix and match the scents.

HOT TOPIC 01 – #LOCKDOWN

The brand has a very unique positioning with its cultural aesthetics – a hybrid blend of heritage, nature and modernity. Riding on the the social hot topic of lockdown, the brand invited its team to be the “ photographers ” to document the lockdown moments and to re-discover the beauty through the everyday perspectives inspired by its CHANKU concept. And it also invited its local community to join the journey of sharing on Weibo, RED and Instagram – a mechanism to drive emotional connection to achieve mental wellness in the context of lockdown.



FRAGRANCE : SCENT LIBRARY

BRAND DEBRIEF

Founded in 2009, Scent Library is a Chinese perfume label that operates 80 highly experiential stores in China selling personal & home fragrances and body care products with a contemporary twist to its traditional Chinese medicine culture. In 2021, Spanish perfume and beauty powerhouse Puig has acquired a stake in Scent Library as a strategic move to continue to win the highly promising Chinese fragrance market.

HOT TOPIC 02 – #MBTI

MBTI is arguably the second buzzy social topic among the young Chinese netizens next to the pandemic topic. MBTI stands for Myers Briggs Type Indicator, a self-report inventory and tool designed to help users identify their personalities, strengths, and preferences. MBTI quickly became a sensation on social media following an interview between Eileen Gu and GQ magazine. The MBTI topic has reached 800 Million views on Weibo with interesting emoticons. And now MBTI has grown into a “super code” for young generations to discover their self-identities. Scent Library has capitalized on this MBTI hype to deliver the fragrance recommendation customized for different persona.



CULTURE

BUILD LOCALIZED PRODUCT STRATEGY AROUND THE CREATIVE NARRATIVES OF CHINESE SUBCULTURES.

CONTENT

BUILD EMOTIONAL STORYTELLING TO LATCH ONTO THE CULTURAL NUANCES AND CONSUMER TRENDS.

COLLABORATION

DEVELOP BRAND HALO IN THE WIDE CULTURAL SCAPES TO CONNECT WITH THE NEXT GEN OF CONSUMERS.

COMMUNITY

BUILD COMMUNITIES WITH THE CREATOR-DRIVEN CULTURE AND TRIBES' INFLUENCER POWERS.

COMMERCE

MAKE COMMERCE A SOCIAL EXPERIENCE TO BRING A NEW LEVEL OF PHYGITAL ENGAGEMENT.

CHAPTER 2 : INTERNATIONAL NICHE BEAUTY BRANDS

THE CONTENDERS

IN THIS CHARTER, WE WILL EXPLORE ...

1.

LOCALIZATION FRAMEWORK

BRAND DNA
PRODUCT
COMMUNICATION
CHANNEL
EXPERIENCE

2.

3 LEVELS OF LOCALIZATION

TRANSLATION
ADAPTATION
CREATION

3.

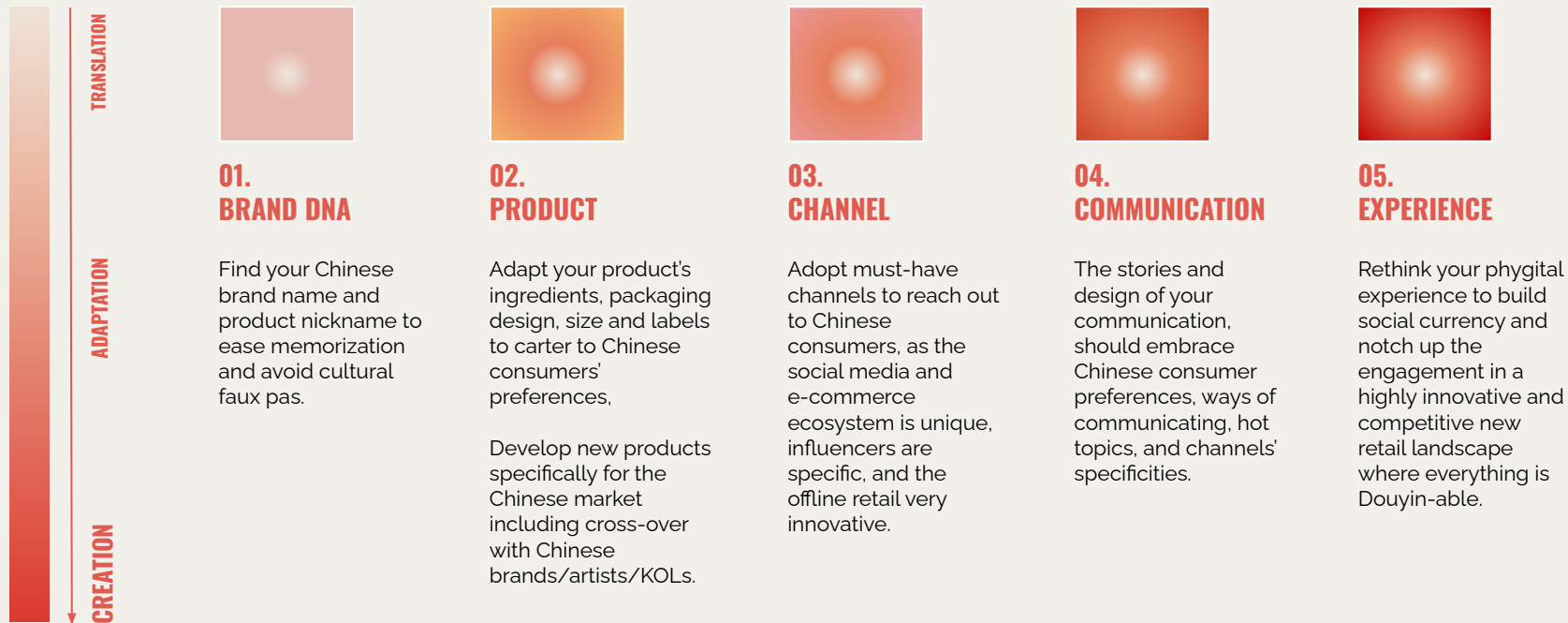
8 CASE STUDIES ACROSS 4 BEAUTY CATEGORIES

SKINCARE
MAKEUP
FRAGRANCE
HAIR CARE



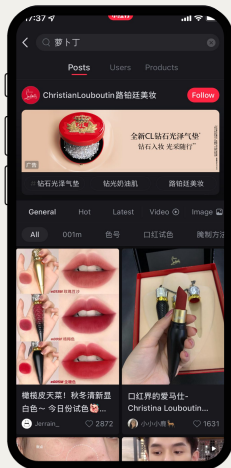
LOCALIZATION FRAMEWORK

What can be localized and how much?



LOCALIZATION FRAMEWORK

showcase



**CHRISTIAN LOUBOUTIN
BRAND NICKNAME
(BRAND DNA)**

The very unique design of its lipsticks has drawn attention from Chinese consumers who dubbed it the "Little Carrot", which became a hot search keyword on RED. The brand now has adopted the nickname of its makeup line.



**PENHALIGON'S NEW
DRAGON PORTRAIT
(PRODUCT)**

Penhaligon's has introduced a new member to its iconic Portrait Family specifically for China – Arthur, a dragon figure, with a design, history and scent closely connected to the Chinese culture.



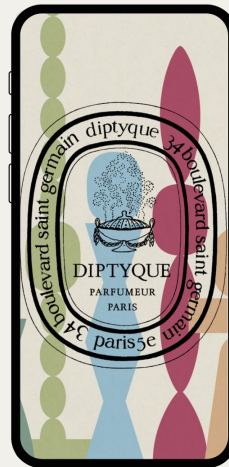
**FENTY BEAUTY COLLABORATION WITH
QEELIA
(CHANNEL)**

Fenty Beauty has collaborated with the MetaHuman influencer Qeelia, the 18-year old influencer created by RED in 2020. This collaboration drove social awareness among Gen Zers..



**CAROLINA HERRERA
CNY STORYTELLING
(COMMUNICATION)**

Carolina Herrera worked with a Chinese artist to craft its Chinese New Year visuals, connecting with Chinese cultural aesthetics.



**DIPTYQUE LE GRAND TOUR
ART EXHIBITION
(EXPERIENCE)**

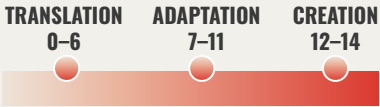
Diptyque launched an art exhibition locally and globally in a celebration of its 60th anniversary. The exhibition created an immersive phygital space inviting brand lovers to experience the fragrant world with love for faraway lands, art and scents.

FABERNOVEL LOCALIZATION FRAMEWORK

Localization Elements		CULT-FAVORITE NICHE BRAND								Total
		Skincare		Makeup		Fragrance		Haircare		
		Farmacy	Drunk Elephant	Fenty Beauty	Byredo	Penhaligon's	Maison Margiela	Aesop	Olaplex	
Brand DNA	Brand Chinese Name	1	1	0	0	1	1	1	0	5
	Product Nickname	1	1	1	0	1	0	0	0	4
Product	China NPD	1	0	1	0	1	1	1	0	5
	IP Collaboration	1	0	1	0	0	1	1	0	4
Channel	Social Media	1	1	1	1	1	1	1	1	8
	Influencer	1	1	1	1	1	1	1	1	8
	Live-streaming	1	1	1	0	1	1	1	1	7
	E-commerce	1	1	1	1	1	1	1	1	8
	Social Commerce	1	0	1	0	1	1	1	1	6
	Offline Store	1	0	0	1	1	1	0	0	4
Communication	Localized Storytelling	1	1	1	1	1	1	0	0	6
	Localized Asset	1	1	1	1	1	1	0	0	6
Experience	Digital	1	1	0	1	1	1	1	0	6
	Offline	1	0	0	1	1	1	1	1	6
	TOTAL	14	9	10	8	13	13	10	6	

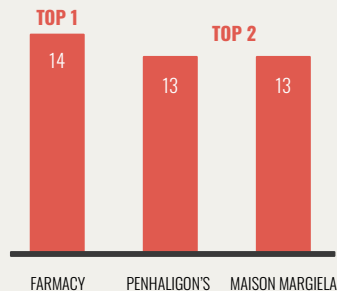
THE METHODOLOGY :

1. We selected 8 niche beauty brands based on their social and commercial traction.
2. Brands are sequenced based on the market entry timeline.
3. We allocate points based on whether they have certain localization elements or not.
4. We use the total scores as foresight to analyse their strategies and localization maturity.



KEY OBSERVATIONS

BY BRAND



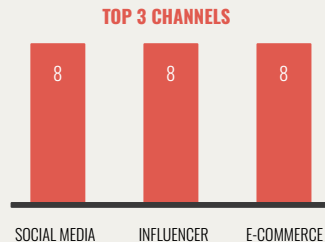
Farmacy is the most localized brand in the panel, followed by Penhaligon's and Maison Margiela with more fully-fledged localization strategies, indicating a huge growing potential of fragrance category in the beauty landscape. Hair care is the least localized category in the panel.

BY STRATEGY (OVERVIEW)



Channel is the top 1 area as a key localization playground for niche brands across the 4 categories to explore from digital to physical touchpoints and from owned channels to paid channels. Apart from channel, communication and experience are widely adopted by skincare, makeup and fragrance categories in the panel.

BY CHANNEL



Channel is the most easy to plug & play element for brands to localize in their Go-To-Market, notably social media, influencers and e-commerce are widely used as must-have touch points. We also see a clear trend of live-streaming as the table stake across the panel. However, we also notice most of the brands are not investing as much in new retail spaces, perhaps due to : a) China policy (for clean beauty brands); b) niche positioning; c) business roadmap.

BY TACTIC (DEEP-DIVE)



Product storytelling, influencer collaboration, brand crossover and O2O experience are the top 4 localization tactics in which brand from the panel heavily invest to capture, engage and convert the Chinese consumers who are often voracious about novel products and experiences.

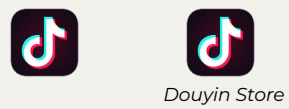


FARMACY

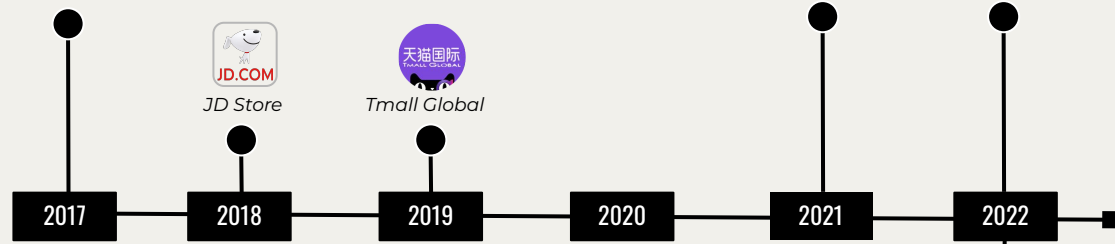


BRAND CHINA JOURNEY

SOCIAL MEDIA



E-COMMERCE



OFFLINE RETAIL

SEPHORA

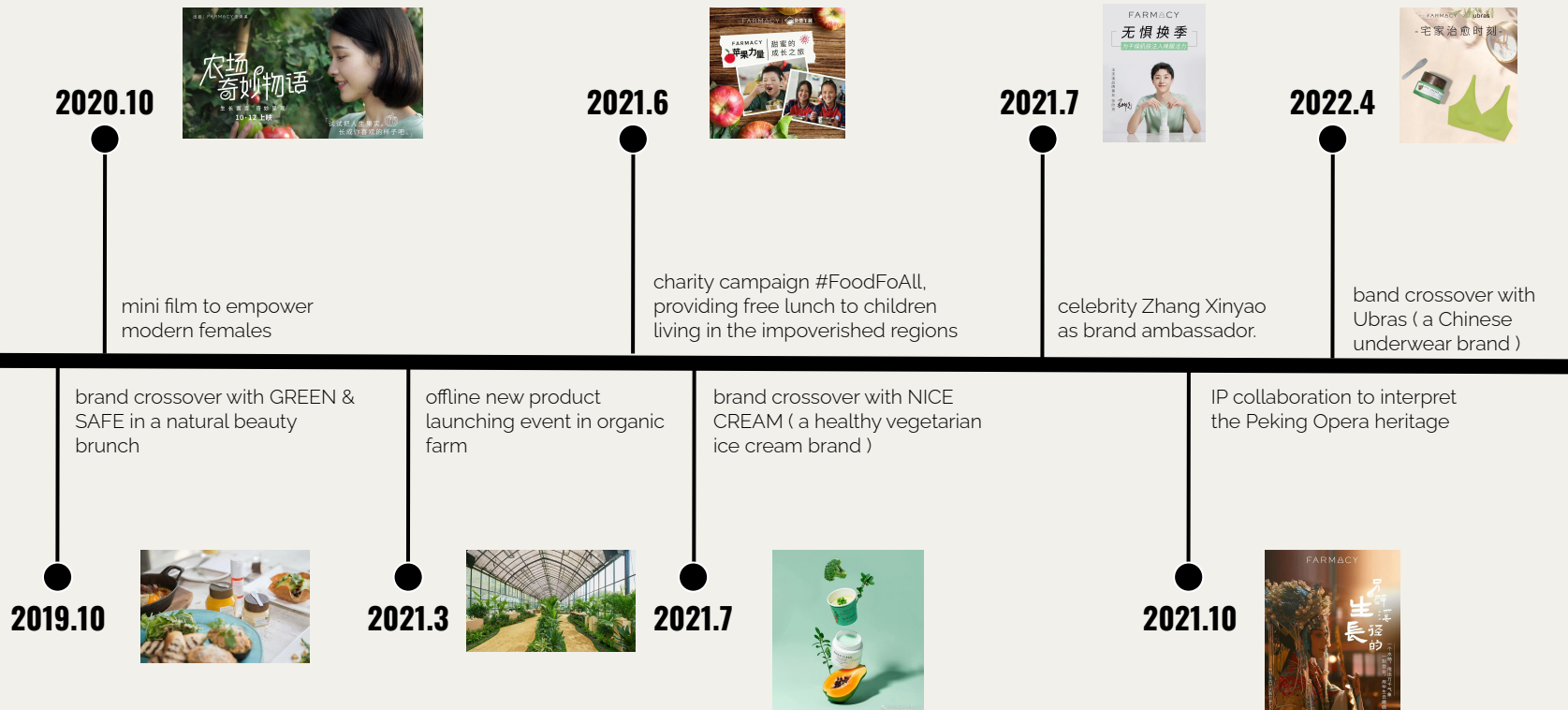
FARMACY

Acquired by P&G in 2021.

Farmacy champions the concept of farm-to-face as a clean beauty brand. It built its digital presence in China since 2017. Farmacy was the first skincare brand incubated by SuperOrdinary, which achieved its huge commercial success on e-commerce platforms with its omnichannel strategies in tandem with brand crossover to storytell the science and nature. In 2021, the brand was acquired by P&G to reflect its core values of its responsible beauty platform.

* Sources : Fabernovel desk research, 2022

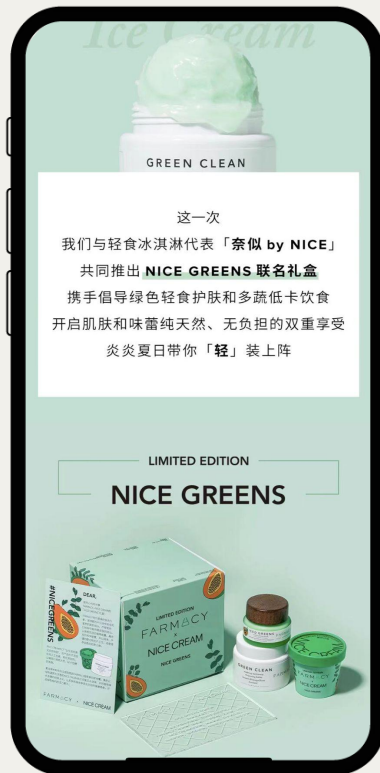
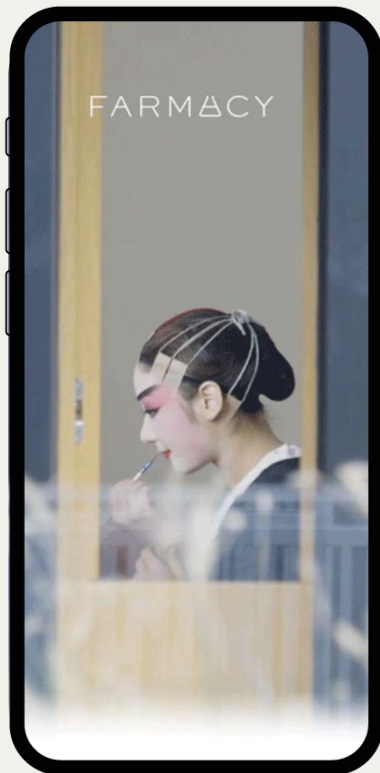
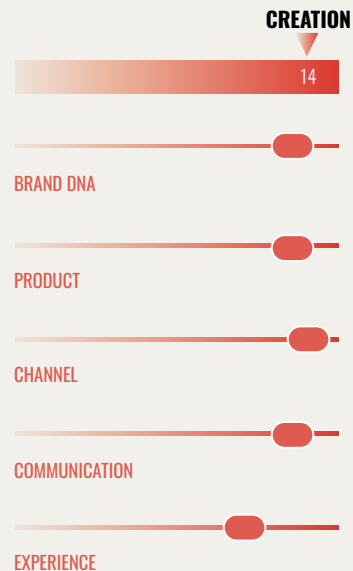
MARKETING MILESTONES



BRAND KEY STRATEGY

LOCALIZATION TOOLKITS :

1. INFLUENCER COLLABORATION
2. BRAND CROSSOVER
3. O2O EXPERIENCE



DESIGNER'S ANALYSIS



RITA YU
DESIGNER AT FABERNOVEL

The use of ingredient & texture elements gives a full play to reflect its fresh and natural look & feels. Its minimalistic use of the colors and fonts make the overall visuals look very clean and accessible. And it is also a good way to highlight the product unique selling points in the posts.



COPYWRITER'S ANALYSIS



YOLANDA LI
COPYWRITER AT FABERNOVEL

The brand content is in lined with its farm-to-face concept as a responsible beauty. The brand often localizes its communication to closely connect with traditional Chinese cultures (such as 24 solar terms and Peking Opera) as well as present-day social topics, a very emotional and humanitarian approach to drive community empowerment around beauty from inside out. The brand is very sophisticated in building “ clean & healthy ” lifestyles that go beyond the products.

时令

自然

唐七生活遵从随性自然，会优先选择符合时令的蔬果，品尝这个时段最极致饱满的味道。

最近她也做了很多无花果料理，想必是夏天最饱满美好的水果了。空口吃，或做沙拉，烤无花果塔都很美味。



“节气与饮食温饱息息相关，催生出了无数文化习俗，成为人们实践生活的最佳参照。用节气时令食材做出的食物除了能感受到「**不时不食**」带给我们的味蕾享受外，更多则成为一种精神上的指引，加深我们与自然之间的联系，「**自然而然**」地把渺小的自身投入到节气变化里，共同构成我们有机生活的

层次与纹理

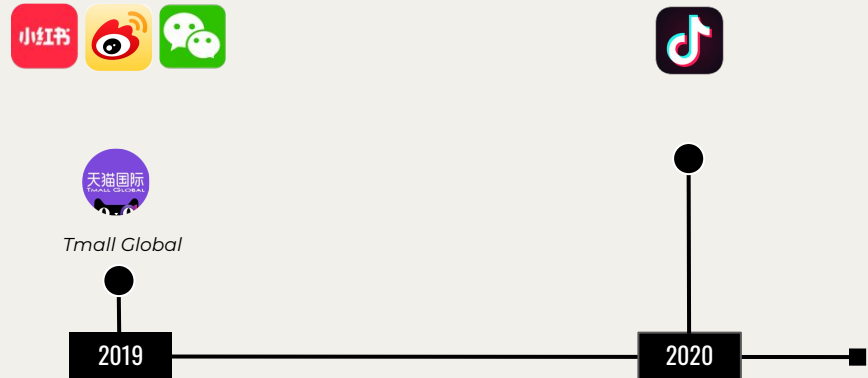


DRUNK ELEPHANT



BRAND CHINA JOURNEY

OFFLINE RETAIL
E-COMMERCE
SOCIAL MEDIA



Acquired by Shiseido in 2019

Drunk Elephant entered the China market in 2019 with a partnership with SuperOrdinary, a beauty incubator based in China to launch its digital store on Tmall Global. With its fast- growing business, the brand was acquired by Shiseido Group in 2019 to bring its recognizable credibility in clean, compatible and effective products targeting young customers.

* Sources : Fabernovel desk research, 2022

MARKETING MILESTONES

2019.11



its first 11.11 festival on TMALL with the overall sales reaching top 10

2020.4



"Clean Beauty Island" on animal crossing, inviting players to experience the virtual lecture through the game.

2019.11



partnership with Sheldrick Wildlife Trust, inviting Chinese consumers to adopt elephants from Africa for CSR initiatives.

2020.3



strategic partnership with dermatologists on WeChat and RED for consumer education on ingredients & efficacy

2021.11

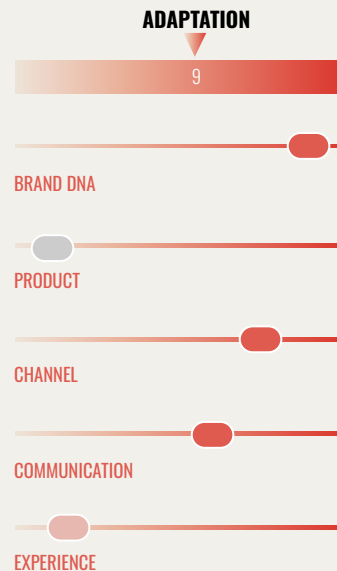


Its first offline appearance at China International Import Expo

BRAND KEY STRATEGY

THE LOCALIZATION TOOLKITS :

1. INFLUENCER COLLABORATION (LIVE-STREAMING WITH DERMATOLOGISTS)



DESIGNER'S ANALYSIS



RITA YU
DESIGNER AT FABERNOVEL

The bright and fluorescent colors and acid graphic elements are very visually impactful to animate the young and playful positioning of the brand, which is one of the design trends on social media these days. A proper use of high-saturated colors could contribute to higher viewership performance.



COPYWRITER'S ANALYSIS



YOLANDA LI
COPYWRITER AT FABERNOVEL

The brand tailored the most localized social vocabularies for the Chinese market in particular, so as to better communicate with Chinese users with educational content and increase brand intimacy as a niche brand. For example, the skincare routine was described as “hardcore” which can only be understood by Chinese users. What's more the brand often adopts buzzy social languages such as “抗老内卷” and “肝业绩” to reflect its playful positioning and to make the clinical terms easier to digest.

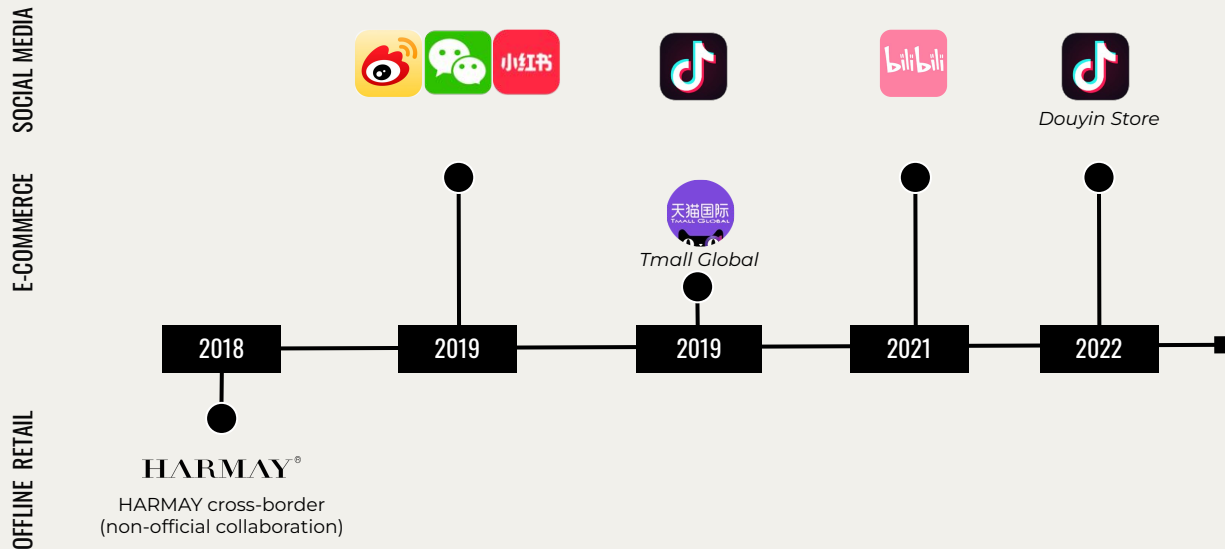




FENTY BEAUTY



BRAND CHINA JOURNEY



B

LVMH-owned makeup brand Fenty Beauty was managed by Kendo, a brand incubator under LVMH group. With the celebrity halo of Rihanna, some of the products were sold through the beauty retailer Harmay. Fenty Beauty made the big moves in 2019 by penetrating all the key social platforms to drive social engagement and launching cross-border e-commerce on TMALL global.



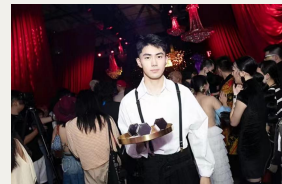
MARKETING MILESTONES

2020.4



brand crossover with tea brand HEYTEA

2021.7



brand collaboration with Vogueing Shanghai, first Ballroom culture platform in China to celebrate its inclusive communities

2019.9



celebrity Chengcheng Fan as the China brand ambassador

2020.9



Rihanna live streaming debut with KOLs on brand's TMALL store

2021.8

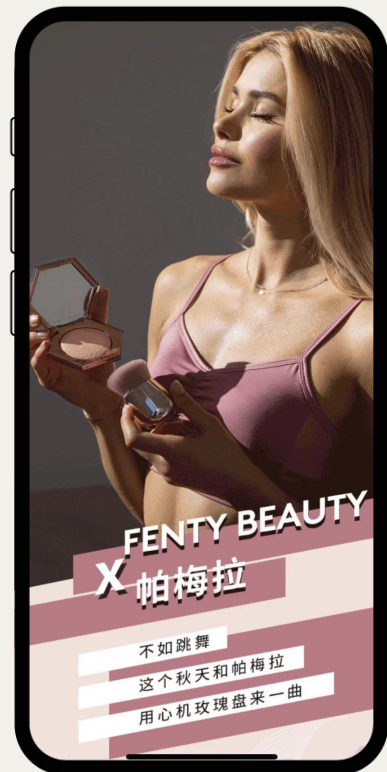
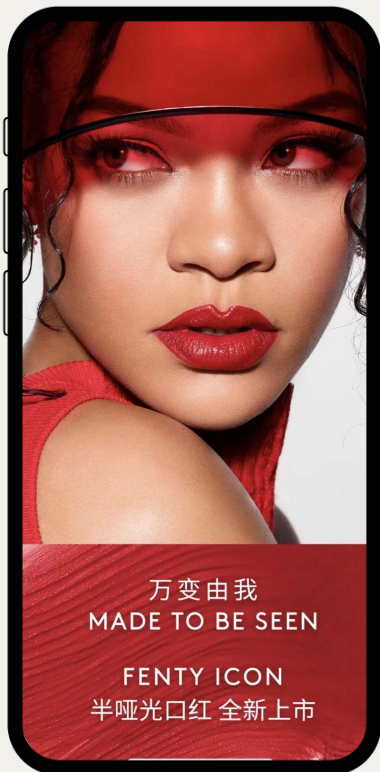
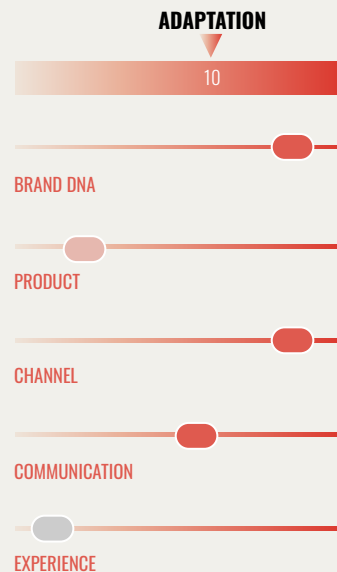


celebrity Caelan Moriarty as brand ambassador

BRAND KEY STRATEGY

THE LOCALIZATION TOOLKIT :

1. INFLUENCER COLLABORATION (CELEBRITY & KOL)



DESIGNER'S ANALYSIS



LIVIA LI
DESIGNER AT FABERNOVEL

The hexagon is the core visual element of Fenty Beauty, which is adopted as a consistent visual language across product packaging, UI design and social content. This geometry element well echos with its unique positioning around inclusivity - beauty for all, which provides a creative space for the designer to play with the geometric shapes and forms for the beauty expressions in a multifaceted way.



COPYWRITER'S ANALYSIS



ROBERT LI
SR. COPYWRITER AT FABERNOVEL

As the new generation of beauty, Fenty Beauty believes that the beauty expressions should not be defined. In this post, the brand teamed up with a cohort of celebrities and KOLs to champion the unique inclusiveness with different identities and sub-cultures. The brand also created rich tutorial content with celebrities to drive the community inspiration and engagement.

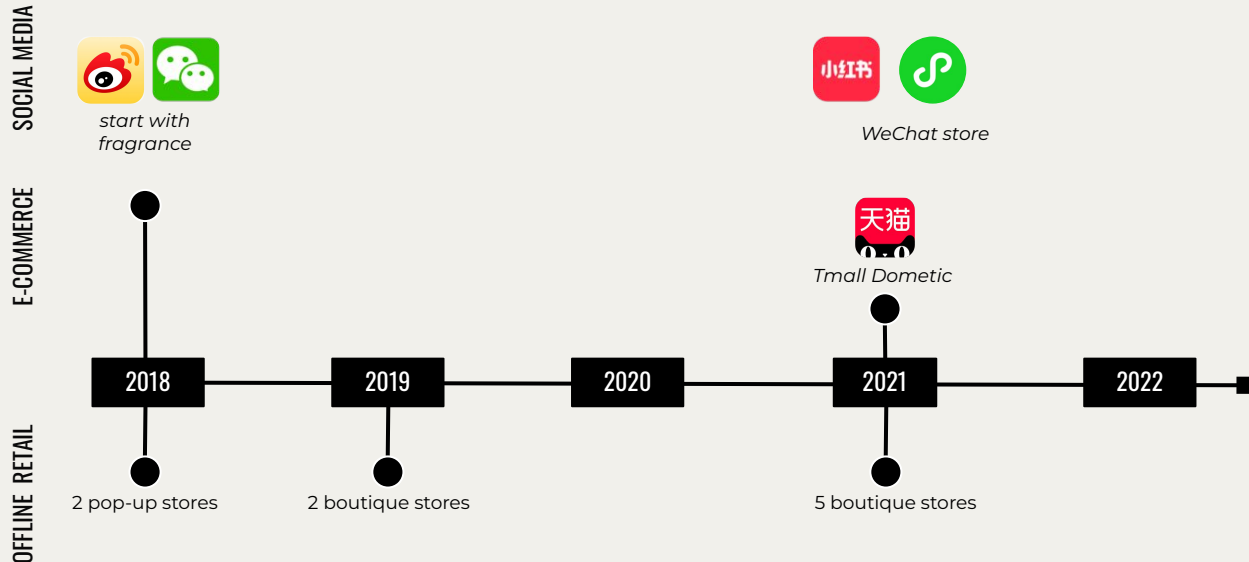




BYREDO



BRAND CHINA JOURNEY



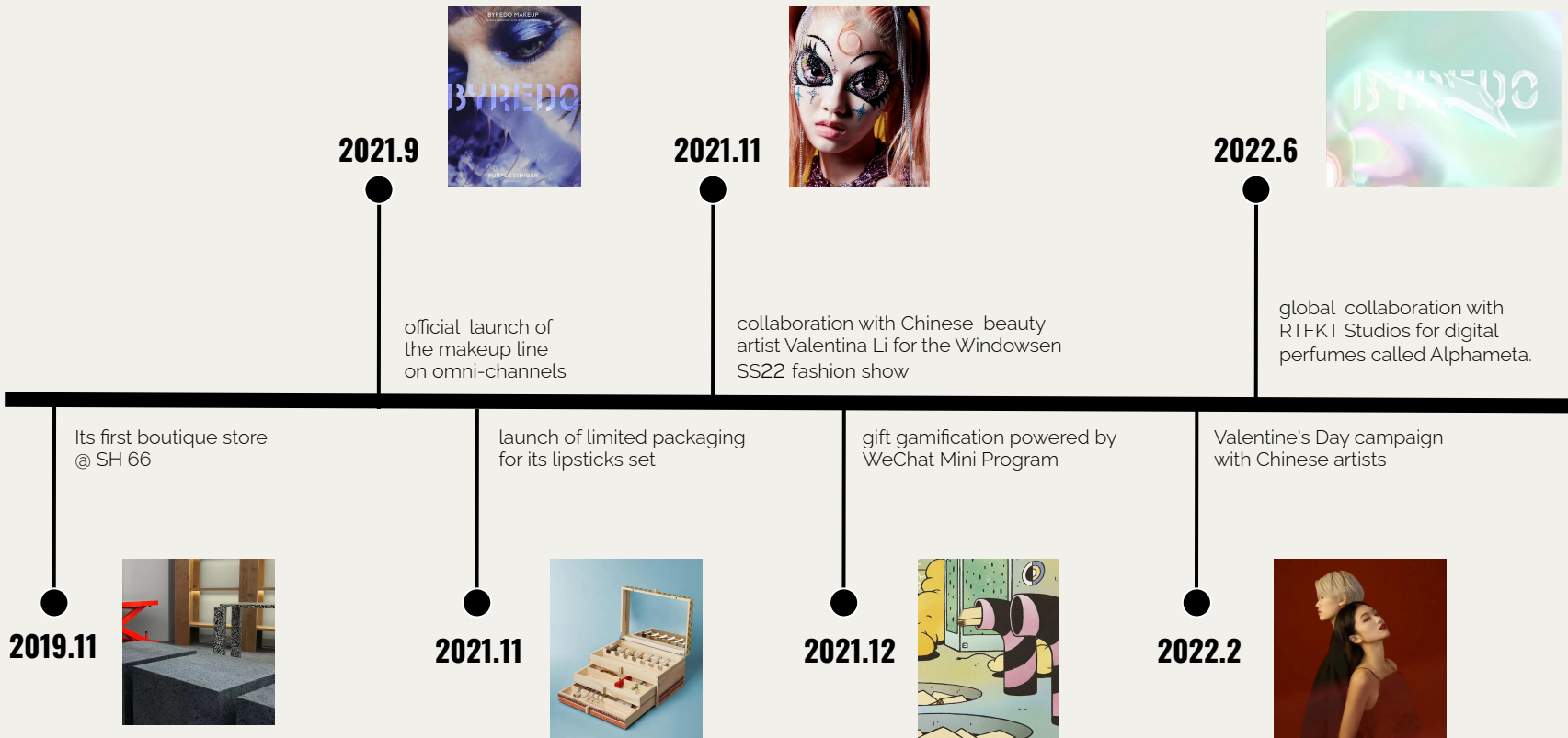
BYREDO

Acquired by PUIG in 2022

Byredo is one of the front-of-mind niche perfume brands among Chinese consumers. The brand opened its first boutique in 2019. With the huge traction with its perfume line, the brand now has its ambition to grow into a mega beauty brand with the acquisition of PUIG, a deal to cement its premium positioning with its disruptive approaches in business building.



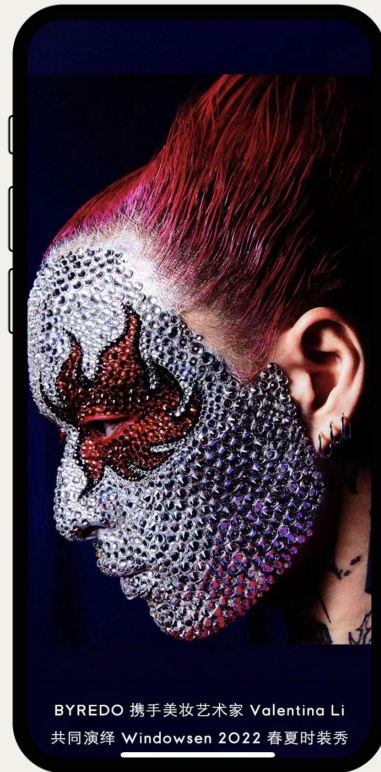
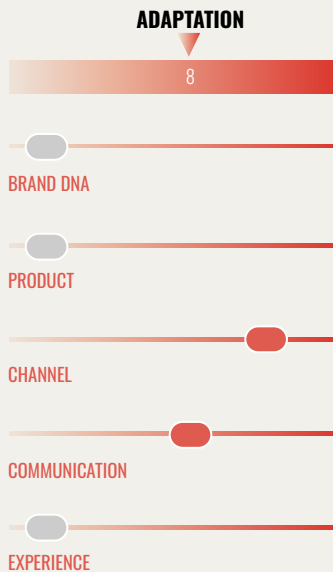
MARKETING MILESTONES



BRAND KEY STRATEGY

THE LOCALIZATION TOOLKIT :

1. INFLUENCER COLLABORATION (ARTIST)



DESIGNER'S ANALYSIS



LIVIA LI
DESIGNER AT FABERNOVEL

The brand is very sophisticated in highlighting its core idea of youthful freedom in the visuals of its social platforms creative assets, with a strong rendering of light and texture to make the products feel more detached from reality. The design concept is highly consistent and complementary to the brand's value.



COPYWRITER'S ANALYSIS



ROBERT LI
SR. COPYWRITER AT FABERNOVEL

The artistic brand DNA and innovative brand partnership has curated a gallery of rich content and materials for product storytelling. Very different from its fragrance line, we see a bolder communication approach with its makeup line, aligned with its avant-garde and experiential spirit that redefines the new luxury of beauty.



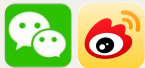


PENHALIGON'S



BRAND CHINA JOURNEY

SOCIAL MEDIA



WeChat store

E-COMMERCE



Tmall Global



Tmall Domestic

OFFLINE RETAIL

2019

2020

2021

2022

3 boutique stores
1 pop-up store

1 boutique store

PENHALIGON'S
LONDON

Entering China market in 2019, Penhaligon's established its digital footprints on social media and e-commerce and built its success story at full throttle in the following 3 years. This brand is now ranked as the top 3 niche perfume brand on TMALL. With a huge social and business tractions contributed by its hero franchise (Portrait collections) with very unique storytelling, the brand ramped up its investment on offline expansion in top-tier cities in China since 2021, expecting to open 20 offline stores by 2023.

MARKETING MILESTONES

2020.11



Austin Li live-streaming with its Portrait collections

2021.11



11.11 sales reaching top 10 on TMALL

2022.1



first digital red packet cover to celebrate the CNY

2022.4



fragrance profiling WeChat Mini Program

2021.9



1st offline pop-up store, followed by 1st store opening in Shanghai

2021.12



launch of WeChat store powered by WeChat Mini Program

2022.3



China-developed product launch, Arthur

BRAND KEY STRATEGY

THE LOCALIZATION TOOLKIT :

1. PRODUCT STORYTELLING
2. NEW PRODUCT DEVELOPMENT
3. ONLINE & OFFLINE EXPERIENCES

CREATION

13

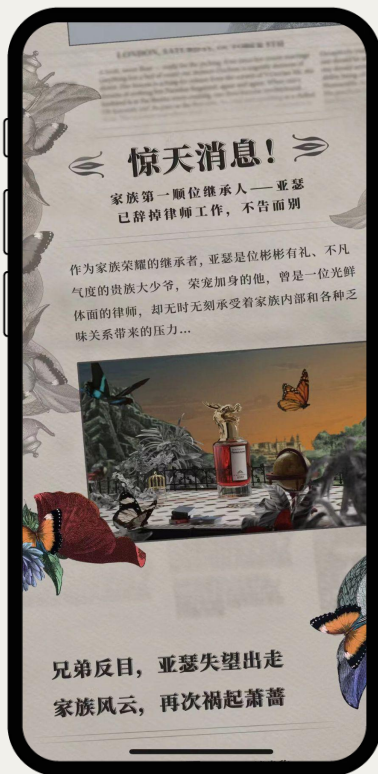
BRAND DNA

PRODUCT

CHANNEL

COMMUNICATION

EXPERIENCE

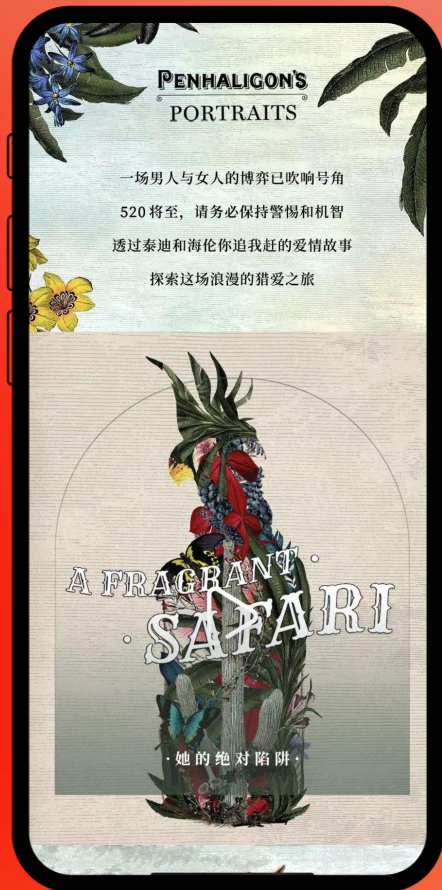


DESIGNER'S ANALYSIS



SILVER LI
DESIGNER AT FABERNOVEL

The overall visual assets tend to be very British, vintage and quirky. The illustration materials animate the Art Nouveau style back in the 19th century, echoing with Chinese youth's appetite for vintage aesthetics. The application of vintage textures and oriental colors with the rich elements of flowers, birds and insects creates a very entertaining and imaginary visual experience with the brand.

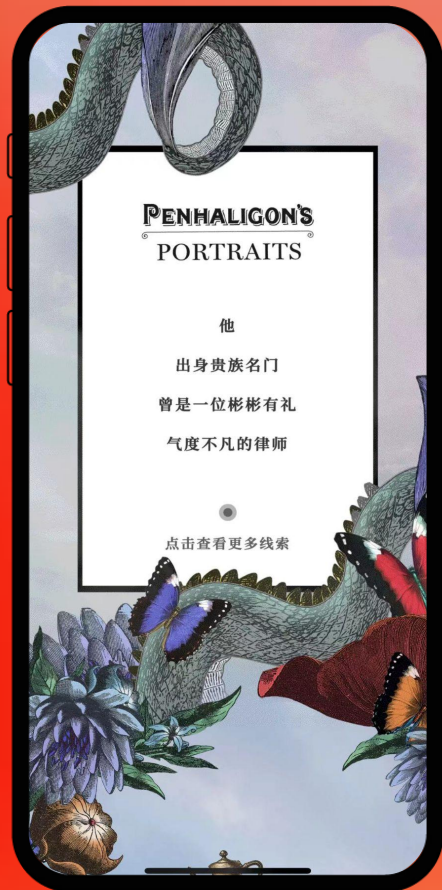


COPYWRITER'S ANALYSIS



ANNE LI
CONTENT PLANNER AT FABERNOVEL

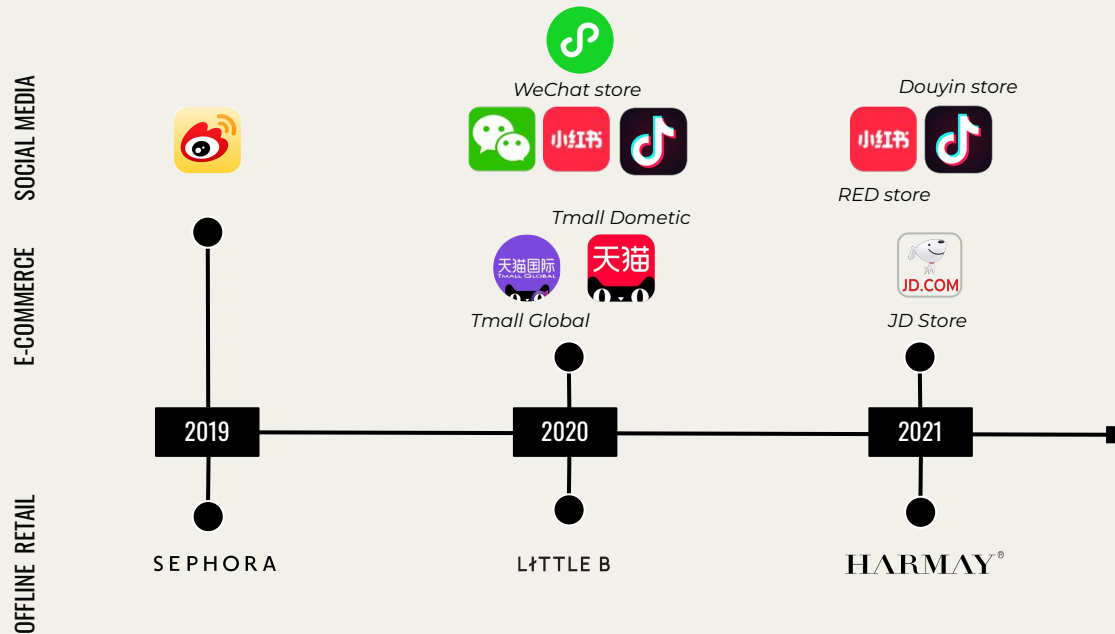
The key to the brand localization includes building the digital presence on omni-channels and a loyal community in the early stage. Content-wise, storytelling is anchored as the core of Penhaligon's' universe that contributes greatly to the huge social traction among the young Chinese consumers. Beyond content, with its ambition of expanding its offline retail business, the O2O experience is also often highlighted on social media to drive UGC engagement.





MAISON MARGIELA

BRAND CHINA JOURNEY

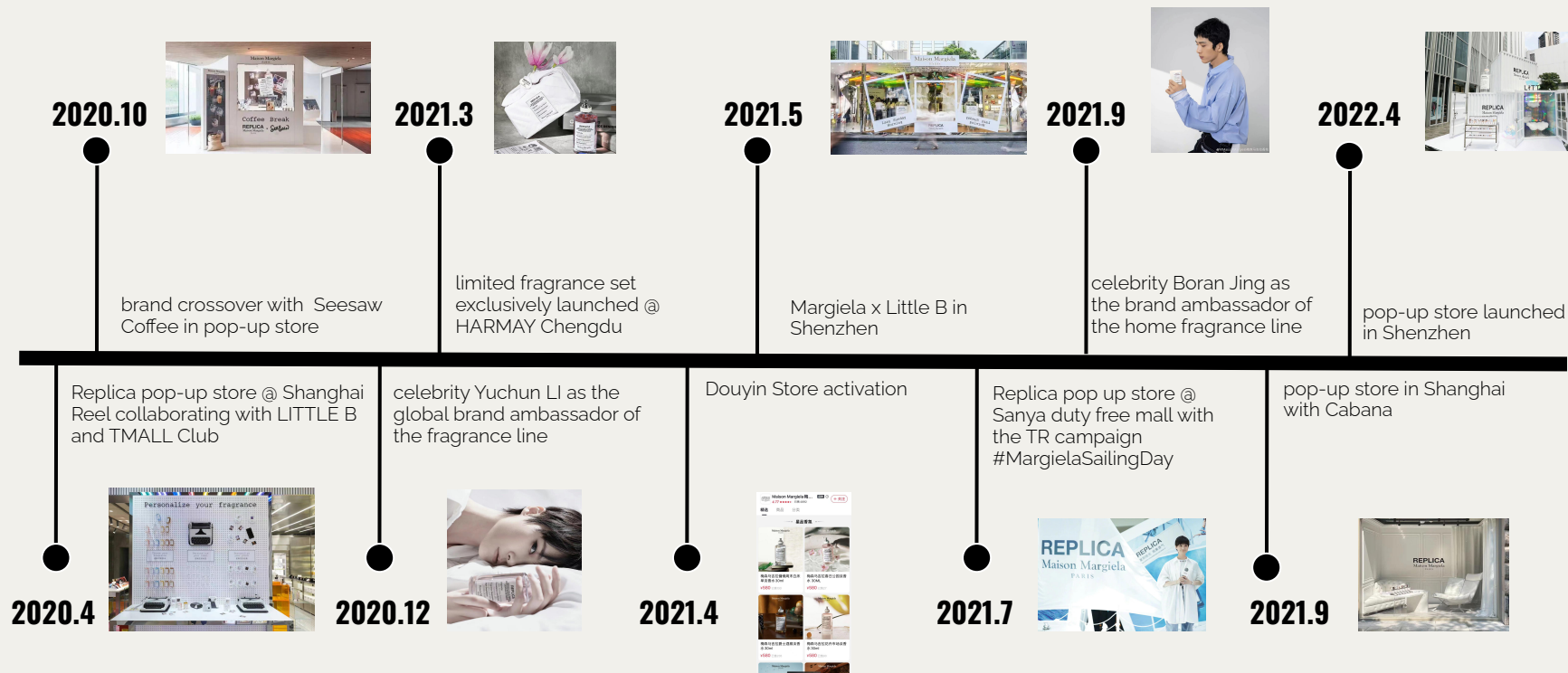


REPLICA

Maison Margiela

With the business traction built with its fashion line, L'Oréal Luxury Division signed an agreement with Maison Martin Margiela in 2008 to create a line of fragrances. Its first fragrance, Replica, was introduced in 2009 and remains an iconic best seller today with scents that reflects all the feel-good sensations and memories. In China, the brand launched its fragrance line in an exclusive partnerships with HARMAY & Little B to target younger generations

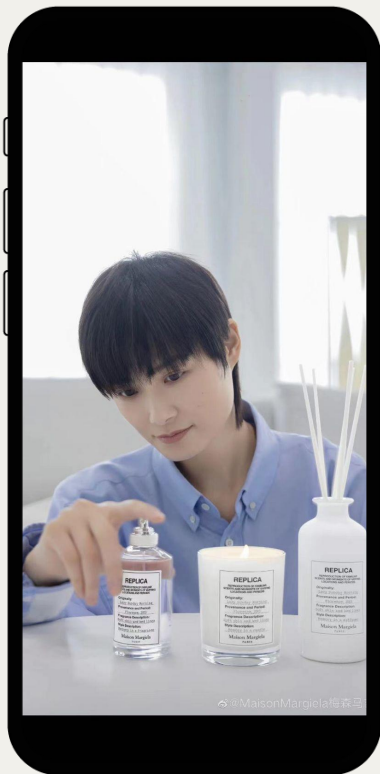
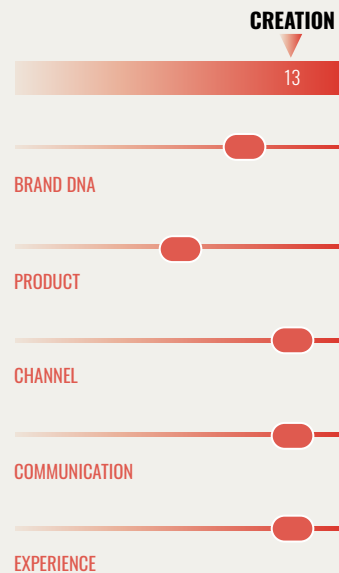
MARKETING MILESTONES



BRAND KEY STRATEGY

THE LOCALIZATION TOOLKITS :

1. INFLUENCER COLLABORATION (CELEBRITY & KOL)
2. O2O EXPERIENCE

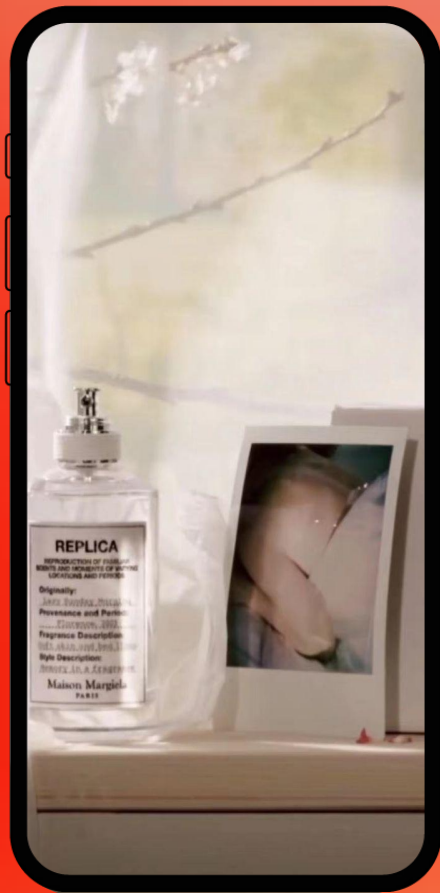


DESIGNER'S ANALYSIS



SILVER LI
DESIGNER AT FABERNOVEL

The Replica fragrance focuses on the exploration of memories and sensational world. Hence, the sensual images around the lifestyle environment and human interactions are at the heart of its visual universe, which well resonates with the consumers by enlivening their personal memories and experiences from the deep inside - also a trigger for them to become the brand lovers. Visually the brand is keen to inspire consumers to imagine and to explore with its sophisticated usage of signature serif typography style, sensory elements (such as photo frames, lights and cities) and white spaces.



COPYWRITER'S ANALYSIS



ANNE LI
CONTENT PLANNER AT FABERNOVEL

The characteristic of Replica fragrance is all about reproducing the scenes with memories, which is usually one of the most delicate and pleasant moments in life. Therefore, content-wise, it is the same vein as its fragrance name, which is usually a narrative depicting a scene using that makes people feel like they are there through the interplay of abstract description.

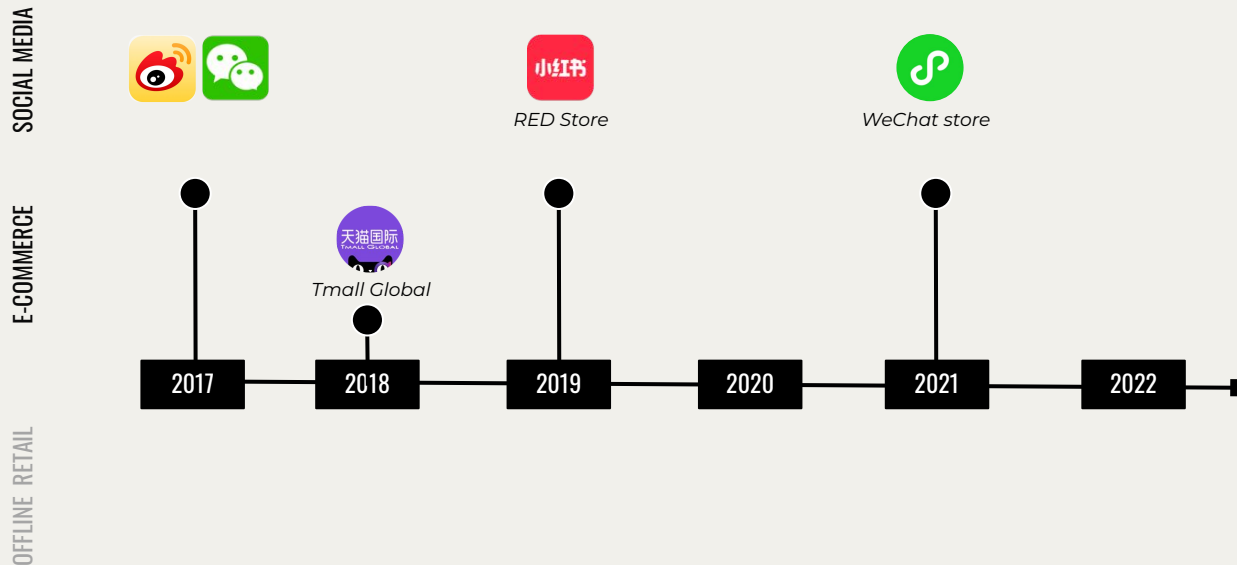




AESOP



MARKETING MILESTONES



Aēsop®

Aesop entered China with a cross-border business model and first opened its online store on Tmall Global in 2018 and activated social commerce on RED in the following year. In 2021, the brand made its first offline debut by launching an art exhibition in Shanghai driving a new buzz of social excitement with its unique aesthetics and lifestyle positioning.



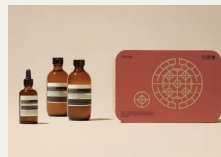
BRAND KEY MOMENTS

2020.10



themed gift box designed
by Chinese artist LOST7

2021.11



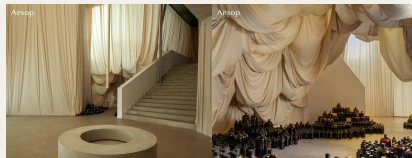
charity gift box as Chinese
limited edition

first skincare workshop
live-streaming on Tmall Global



2019.8

offline art exhibition in Shanghai



2021.11

Aesop x Rick Owens travel set



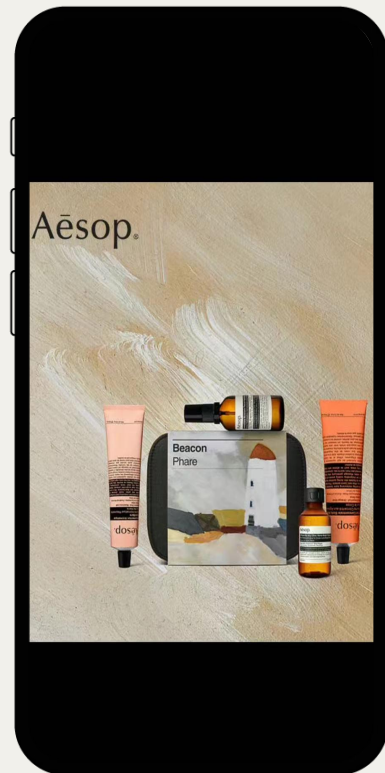
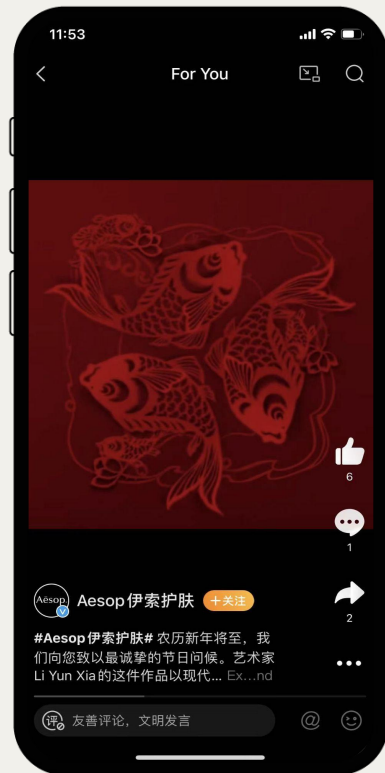
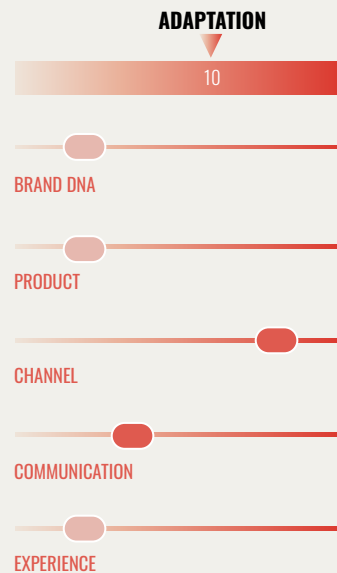
2022.3



BRAND KEY STRATEGY

THE LOCALIZATION TOOLKIT :

1. INFLUENCER COLLABORATION (ARTIST)

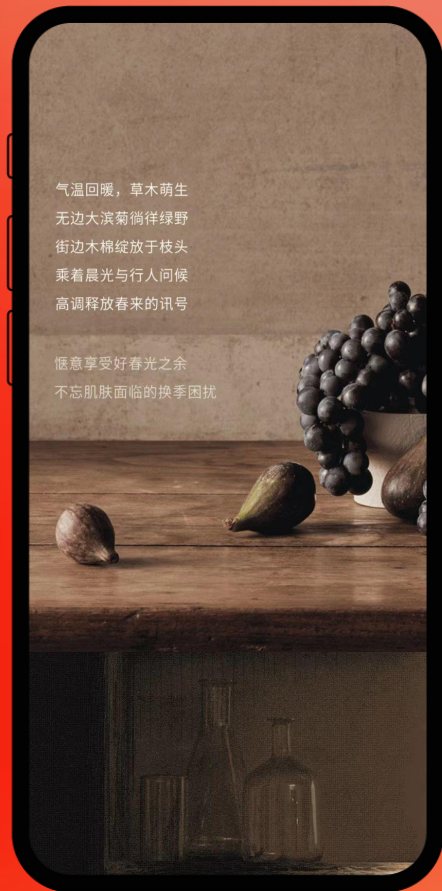


DESIGNER'S ANALYSIS



EMMA ZHANG
DESIGNER AT FABERNOVEL

The brand pursuit of ultimate unity in product design can be reflected in all the visuals, which contributes to a very unique and functional brand tonality that has become Aesop's signature minimalist aesthetic. In terms of the social content, Aesop effortlessly curates a very immersive and lifestyle-oriented spaces for the viewers to fully feel the nature and art.





OLAPLEX



BRAND CHINA JOURNEY

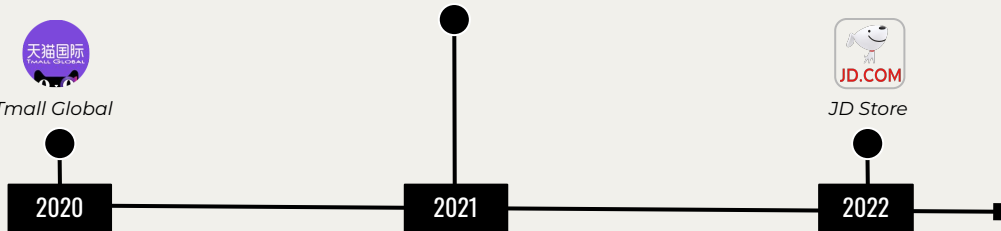
SOCIAL MEDIA

*Douyin Store**RED Store*

E-COMMERCE

*Tmall Global**JD Store*

OFFLINE RETAIL



OLAPLEX.

OLAPLEX Tmall Global Store was opened in 2020, announcing its journey into the China market. On its first anniversary of the brand's presence in China, OLAPLEX became a strategic partner of JD.com International, aiming to present itself to consumers in a better light together with the brand through the mature e-commerce operation and services from JD.com.



MARKETING MILESTONES

2021.10



celebrity Keyu Zhou as the China brand ambassador with his first debut on live-streaming

2022.5



award of ELLE Green Beauty Star 2022 - Hair Care Technology Force Award."

partnership with high-end hair salon Z-ZEST for a offline styling experience

2022.1



BRAND KEY STRATEGY

THE LOCALIZATION TOOLKIT :

1. INFLUENCER COLLABORATION (CELEBRITY & KOL)
2. O2O EXPERIENCE

TRANSLATION

6

BRAND DNA

PRODUCT

CHANNEL

COMMUNICATION

EXPERIENCE



DESIGNER'S ANALYSIS

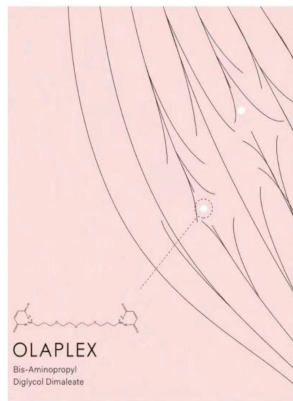


EMMA ZHANG
DESIGNER AT FABERNOVEL

Olaplex adopts a minimalist approach in product packaging. To a certain extent, it can be more reflective of its credibility as a professional and high-performing hair care brand. Such visual approach is also extended to the social content, where the brand removes any superfluous visual design to call out the functionality of the products (as an ins-beauty brand).

专利成分Bis-Amino

OLAPLEX以专利成分Bis-Amino为基础
添加护肤成分
如霍霍巴油、芦荟叶汁、
葡萄籽油、池花籽油等
以天然植萃力，为发丝注入高能营养
赋活发芯，滋养柔顺



Bis-Amino

KEY TAKEAWAYS

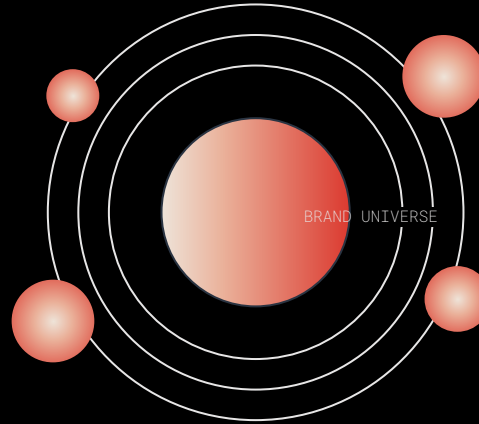
WIN THE NEXT GEN OF CONSUMERS WITH MUST-HAVE LOCALIZATION RECIPES .

PRODUCT STORYTELLING

CHINA-SPECIFIC NDP
CHINA-SPECIFIC PACKAGE
ARTIST COLLABORATION
IP COLLABORATION

BRAND CROSSOVER

CULTURAL COLLABORATION
PRODUCT COLLABORATION
EVENT COLLABORATION



INFLUENCER COLLABORATION

CELEBRITY COLLABORATION
ARTIST COLLABORATION
PROFESSIONAL COLLABORATION
KOL COLLABORATION & KOC SEEDING
VIRTUAL IDOL COLLABORATION

O2O EXPERIENCE

WECHAT MINI PROGRAMS
NEW RETAIL
POP-UP STORE
EXHIBITION



SOCIAL MEDIA



E-COMMERCE



OFFLINE



CONNECT WITH OUR EXPERTS

AUTHORS:

LEA WANG : BUSINESS & STRATEGY MANAGER
JOANNA YAO : BUSINESS EXECUTIVE



BOOK US FOR AN ONLINE OR OFFLINE KEYNOTE.

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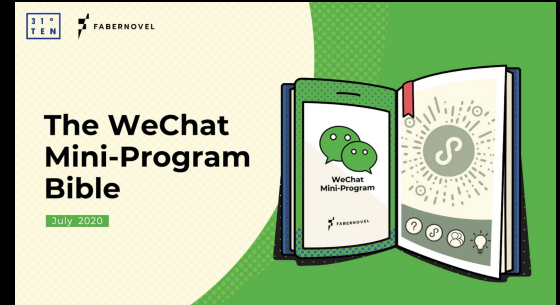
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GO BEYOND



[Into the Chinaverse](#)
(Published in May, 2022)




[The WeChat Mini Program Bible](#)
(Published in July, 2020)



[WeChat Social Ads Playbook](#)
(Published in September, 2019)

STAY TUNED



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HOW CAN WE SUPPORT THE CHINAFICATION OF YOUR BRAND ?

SERVICE MAPPING

SOME CLIENTS

BRAND DNA	PRODUCT	CHANNEL	COMMUNICATION	EXPERIENCE
<ul style="list-style-type: none">1. Chinese brand name2. Chinese Product nickname	<ul style="list-style-type: none">1. New Product Development2. IP Collaborations (Chinese Brands, Artists, KOLs, Celebrities...)	<ul style="list-style-type: none">1. Social Media Retainer (WeChat, RED, Douyin...)2. Influencers Collaboration (Celebrity, KOL, KOC)3. Live Streaming (Branding, Education, Community)4. Social Commerce (Omni-Channel Mini Programs)5. Social CRM	<ul style="list-style-type: none">1. Localised Storytelling (Content Planning & Copywriting)2. Localised Assets Creation (Photo & Video Shooting)	<ul style="list-style-type: none">1. O2O Campaigns2. Experience & Campaign Mini Programs & H52. In-store Activations (Events, Tech)

Aēsop.

clé de peau
BEAUTÉ

SHISEIDO
GINZA TOKYO

NARS

PENHALIGON'S
EST. LONDON 1870

CAROLINA HERRERA



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