

# 从“美丽新势能”到“美丽新质能”

## ——观念、行业、市场、社会“四维一体”贡献美妆行业 高质量发展

### 摘要

消费在现代社会中扮演着至关重要的角色，它不仅是经济活动的基础，是推动城市发展和文化繁荣的重要动力，也是一个城市乃至一个国家的经济活力和生活品质的映射。近年来，我国居民收入水平不断提高，消费需求日益增长，个性化消费以及对消费品品质的追求成为当前消费需求变化趋势。

随着国民可支配收入不断提升、公众个人的美容护肤理念逐步增强、科技创新水平提高、女性独立意识觉醒、健康和可持续发展意识的增强、社交媒体影响和跨界合作以及平拍合作等原因的影响加深，如今的中国美妆市场已成长为世界第二大化妆品消费市场。我国的美妆行业正逐步成为消费领域最具活力的行业之一。

美妆行业的高速发展是一种来源于自身规模和速度的动能，同时由于它所处的位置和高度，它更是一股强大的势能。本篇报告围绕“新质生产力赋能美妆行业加速发展”命题，阐述美妆行业如何通过挖掘自身规模和速度的动能，为中国经济和社会发展创造“美丽新势能”，并成为推动中国高质量发展和满足人们美好生活向往的力量来源。

新质生产力促进了消费市场的繁荣发展。作为动、势能不断正向循环和互相促进的生态圈，“美丽新势能”本质上是美妆行业与新质生产力相结合的最佳诠释。我们相信，“新质生产力”与“美丽新势能”的结合，能推动“美丽新

势能”向“美丽新质能”提质升级，贡献美妆行业高质量发展。

推动经济社会发展绿色化、低碳化是实现高质量发展的关键环节。“新质生产力”与“美丽新势能”的结合，通过推动产品和服务科技创新，探寻绿色低碳、可持续发展之道，拓展合作模式和商业生态价值，打造文化软实力，以及为营销推广注入多元化和包容性等方式，在消费理念和社会意义上兼具广度和深度的美妆消费方式将重构消费价值、激发市场创新活力。

推动美妆行业进一步发展，需要从观念、行业、市场、社会四大维度入手，激活新质生产力，为推动美妆行业高质量发展注入活力。因此，我们建议，助力美妆行业持续快速发展，可以从以下四方面着手，即是以“美丽新质能”为核心：在观念上引领美丽新潮流；在行业扶持上激发美丽新活力；在市场培育上促进市场新繁荣；在社会引导上推动发展新理念。

我们相信，通过政府、行业和社会各界的携手，势能无限的美妆一定能成为消费领域最早扇动翅膀的那只美丽蝴蝶，为提振消费、扩大内需，为美好生活，为高质量发展贡献更大的“美丽新质能”。

## 一、消费成为中国经济增长“主引擎”

随着全球经济逐渐走出新冠疫情的负面影响，各行各业迎来了全面复苏和强势增长的转折点。数据显示，2023年中国经济总量突破126万亿元，较2022年增长5.2%，稳居世界第二位。

当前，消费已经成为带动经济持续增长的主引擎。数据显示，2023年，最终消费支出拉动经济增长4.3个百分点，比上年提高3.1个百分点，对经济增长的贡献率为82.5%，提高43.1个百分点，消费的基础性作用更加显著。

2024年春节期间，国内旅游出游4.74亿人次，总花费6326.87亿元；春节档票房突破80亿元，同比增长18.47%；全国重点零售和餐饮企业销售额同比增长8.5%。这些鲜活滚烫的消费数字背后，是消费市场供需两旺的体现，也折射出中国经济的活力。

近年来，政策性指导与结构性改革提振市场信心、不断壮大的中产阶层和富裕群体和数字基础设施和移动物联网的快速发展等因素，都促使消费在经济发展中扮演着基础性和关键性的角色。

## 二、美妆是消费领域最具活力的行业之一

### 2.1 行业：推动经济高质量发展的关键力量

近年来，美妆成为消费市场中的灯塔行业，中国也成为了全球第二大化妆品市场。美妆行业一直在领跑社会零售总额的大盘。改革开放以来的40多年来中国经济总量翻了约10倍，而化妆品的零售总额翻了约29倍，美妆市场增长超过1000倍。

- 在内需提振上——消费者对美的向往升级催生了新的消费需求，而美妆行业也通过在供给端的改革稳稳地接住了这些需求，行业和企业也在积极通过跨界融合，不断开拓着新的消费体验和创新模式。

- **在社会影响力层面**——美妆的发展扎根于多元的社会文化和自然资源，具有极强的亲和力。美妆企业承担起许多社会话题与行动的启蒙者和先行者的责任,从而成为中国包容发展和可持续发展的中坚力量。

## **2.2 数字化：助力美妆飞速发展**

在这个行业里，创新和拓展一直是关键词。

- **美妆与数智科技的深度融合，打开了中国年轻人的职业新赛道。**企业的数字化转型也在帮助更多从业者实现职业的转型与升级，中国数字化的领先也让美妆行业正在孕育世界级的专业人才乃至大师。

- **数字化走向数智化，迅速感知大众消费需求。**通过自下而上收集大量消费者数据，打通线上线下数据孤岛，让大数据分析成为消费者洞察的必备能力。此外，美妆企业可以通过数据分析，为用户提供感兴趣的品牌、产品、服务以及体验。

- **美妆“黑科技”打造智能化产品格局。**检测和指导工具、个性化美妆科技解决方案、以及可持续美妆科技解决方案等都离不开技术的支持。通过虚拟试妆、AR 技术、智能推荐等手段，消费者可以更方便地了解 and 选择适合自己的美妆产品，提升购买满意度。

## **三、从“美丽新势能”向“美丽新质能”转型升级**

### **3.1 提出“美丽新势能”的社会背景**

当前，中国已将“不断实现人民对美好生活的向往”作为主要的奋斗目标，引领中国发展更加聚焦美。近年来，大众消费观念以及审美观念逐步升级和改变，越来越多的消费者开始注重自己的外在形象，彩妆渐渐变得越来越重要。人们对美的理解，也越来越从外在出几道了内在，从为悦己者容到为悦己而容，美成为了人美的一种自洽，消费者开始追求“时尚”与“个性”，美妆也

逐渐承载起消费者对美好品质生活的向往，助力消费者彰显个性。

美妆在中国的地位与发展是产业与社会经济发展的相互促进，是一种动势能相互转换的过程。一方面，中国社会经济的进步动能，给中国美妆产业的发展创造了广阔的势能空间；另一方面，美妆产业的发展动能也潜移默化地成为中国社会发展源源不断的势能来源。我们将这个动势能不断正向循环和互相促进的生态圈，定义为“美丽新势能”。

要构成动势能之间相辅相成的转换结果，美妆行业首先要在自身的发展和进化过程中不断蓄势。同时也要从社会发展中找到新赛道新风口以借势，从而给市场、行业和消费者带来创新的理念、产品、服务、体验、知识以及对美的无限向往等多重价值。

### **3.2“美丽新势能”四大维度和十大趋势**

培育发展新质生产力需多维度协同发力，在接下来的建议部分，我们将对“美丽新势能”的四大维度和十大趋势进行逐一解读，为促进消费提质提供思路 and 基础。

#### **3.2.1 维度一：观念**

**美妆承载消费者对美好生活的向往，助力消费者彰显个性，敢创明日。**

- **趋势一：小心爱美，平价享乐→美好向往，品质追求**

美妆行业在向高品质、多元化的方向发展。随着人均可支配收入的持续上涨，以及社会大众对生活品质的追求，国内人均化妆品消费指出呈现逐年递增的趋势。同时，美妆与人们向往的生活方式互相加持。产品功能的专业化、社交媒体的广泛性、美妆产品高端化等，都将支持消费者追求更高层次的身心健康。

- **趋势二：悦人而容，含蓄内敛→己悦而容，敢秀自我**

消费者尤其是女性消费群体的崛起，以及其自信独特审美观念的觉醒，都不断催动消费态度向现在追求成长、一人千面进行转变。此外，伴随着互联网的发展，银发一族、男性、残疾人等也在不断接触和了解时尚的魅力，并不断走向“美丽聚光灯”的中心。

2024 年年初颁布的《关于发展银发经济增进老年人福祉的意见》强调展抗衰老产业，深化皮肤衰老机理、人体老化模型等在抗衰老领域的研发应用。大力发展抗衰老产业不仅能够拓展银发经济发展空间，同时能够满足高净值人群及年轻群体多元化的抗衰老消费需求，促进社会文化多元化发展。

- **趋势三：逆境慰藉，活在当下→逆流而上，另辟蹊径**

当前，美妆早已成为消费者美好生活的一部分。现在的美妆不再仅仅是享乐的产物，它更代表了乐观的预期，以及社会大众想要不断改变并成就更好的自己和社会的意识。

### **3.2.2 维度二：行业**

美妆行业从计划经济到顺应中国市场化和科技的趋势，通过组织升级和数智创新，不断开拓着新的消费体验和创新模式，在加速发展的同时，也把机遇分享给了更多人。

- **趋势四：计划限量，小而奢美→消费蓬勃，广而大美**

如今美妆行业已从为消费者提供不多的选择到推出琳琅满目的产品，影响力越来越大。数据显示，化妆品销售额的增长速度已超过大盘，在社会零售中的占比不断提升。此外，美妆也已成为能够带动区域发展，构建产业集群的旗舰行业。

- **趋势五：精修内功，独善其身→跨界融合，创新灯塔**

中国正在被越来越多的国际企业视为全球最重要的战略市场。当前，化

妆品行业正在由单一发展的初级制造业向立足高质量、新格局、大融合、讲创新的现代化轻工业发展。

美妆企业通过组织形态的创新，承接科技带来的更大推动力，凭借对内培育孵化，对外投资并购的双轨模式，积极开拓行业新机会,也给其他行业搭建了跨界创新的广阔平台。

- **趋势六：传统零售，销售就业→数智先驱，技能兴市**

美妆与数智科技的深度融合，打开了美丽事业对中国年轻人的职业新赛道，企业的数字化转型也在帮助更多从业者实现职业的转型与升级，助力他们打破职业的天花板。

### **3.2.3 维度三：市场**

作为离年轻消费最近、市场化水平最高的行业之一，美妆市场随着企业与市场的共同进化，以及市场供给和需求的协同升级，真正进入了百花齐放的高质量发展时代。

- **趋势七：非必需品，供给驱动→生活刚需，需求牵引**

当前，化妆品逐步从供给驱动的锦上添花的非必需品转变为需求导向的生活必选消费品，品牌和消费者共创正在推动产品的反向创新。与上世纪被动接受品牌和产品讯息的消费者相比，新一代的年轻人有能力，也有兴趣主动了解和为自己的需求表达和贡献想法。

- **趋势八：强者当道，肆意生长→百花齐放，良性发展**

化妆品发展正在步入百花齐放的良性发展时代。在互联网、数字经济等的推动下，中国化妆品市场不断开放与扩大，营商政策层出不穷，市场监管也越来越与时俱进，越来越与国际接轨，近几年来，我国现存化妆品相关企业 1476.74 万家，超过 90%的企业成立于 5 年之内。

### 3.2.4 维度四：社会

美妆的发展扎根于多元的社会文化和自然资源，因而对社会的需求和环境的问题有着天然的嗅觉。又加之美妆与生而来的亲和力，美妆企业自然身先士卒地承担起许多社会话题与行动的启蒙者和先行者的责任，从而成为中国包容发展和可持续发展的中坚力量。

- **趋势九：独属于她，各美其美→共享包容，美美与共**

中国正在步入发展的新阶段，包容多元已成必须，其中赋能女性尤为引人注目，女性已经不再只是局限于家庭的贡献，更为经济和社会发展做出“不让须眉”的靓丽贡献。

- **趋势十：增长优先，兼顾责任→绿色先锋，美好星球**

美妆企业的发展目标，已经实现了从追求短期财务绩效到可持续、高质量发展的转型。美妆作为离消费者最近的行业之一，对人们的消费理念和价值观的塑造有很大的影响力。我们正通过自身转型，带动上下游和消费者共同把可持续消费付诸行动。

## 3.3.“美丽新势能”为新质生产力提供美妆行业“生动注脚”

### 3.3.1 何为新质生产力

我国居民消费结构在不断升级，人们青睐科技和文化含量高、使用方便、更美更有质感的产品。2023年9月，习近平总书记在黑龙江考察时首次提出“新质生产力”一词，为整合科技创新资源、发展战略性新兴产业和未来产业指明了方向。新质生产力是由技术革命性突破、生产要素创新性配置、产业深度转型升级而催生的当代先进生产力，它以劳动者、劳动资料、劳动对象及其优化组合的质变为基本内涵，以全要素生产率提升为核心标志。

### 3.3.2“新质生产力”与“美丽新势能”



新质生产力与消费环环相扣。2021年至2025年，科技赋能下美妆行业的复合增长率可达17.1%。若能将以新技术深化应用为驱动的新质生产作为推动力量，赋能美妆行业，将进一步将为整个美妆行业注入新的活力和动力，即进一步释放“美丽新势能”。

- 通过科技创新和生产要素创新，企业能够开发出更具吸引力和竞争力的产品，**满足人们日益变化的需求和偏好**。低碳环保和可再生的设计理念、个性化的定制服务及引爆消费场景的购物体验等，给消费者提供了更加多元化、细分化的选择，从而推动消费市场的发展和壮大。

- 通过与新质生产力的融合，美妆行业可以实现**更高效的生产和管理，提高产品质量和创新能力**。这种创新不仅满足了消费者对个性化和高品质产品的需求，还为美妆行业带来了新的增长点和竞争优势。

- 新质生产力也将**促进美妆产业链的升级和转型**。从原材料的研发到产品的设计制造，再到销售渠道的拓展和营销方式的创新，都将受益于新技术的赋能。这将进一步促成美妆行业生态系统的形成，形成一种良性循环和互相促进的态势。

#### **四、核心政策建议**

技术创新与社会制度变革之间也会相互作用，推动社会不断向前发展。新质生产力促进了消费市场的繁荣发展。通过推动产品和服务科技创新，探寻可持续发展之道，拓展合作模式和商业生态价值，以及为营销推广注入多元化和包容性等方式，激发市场创新活力。因此，我们建议，以美丽新势能的四大维度发力，从而进一步激活新质生产力，扶持美妆行业的高质量发展。

图 1：核心政策建议

政府角色	发力方向	具体政策建议
观念：以美丽新质 能引领美丽新潮 流	融合美丽观念新创新	促进全球新品交流，保持美 妆行业活力
	培育美丽认知新提升	促进美妆消费认知的多元化 融合互动
行业：以美丽新质 能激发美丽新活 力	赋能产品、服务、体验等 高品质提升	鼓励美妆原料研发创新
	推动理念、技术、应用等 换挡升级	鼓励美妆科技高效转化和落 地
	激发创新、多元、个性等 消费活力	关注银发族和多元化群体的 美丽需求
市场：以美丽新质 能促进市场新繁 荣	创造美丽消费供需新平 衡	适度放松监管，为消费品市 场注入新活力
	孵化美丽经济增长新生 态	促进大公司和初创企业合 作：推动美妆链主链属企业 深度合作。
社会：以美丽新质 能推动发展新理 念	展现绿色发展新社会责 任	实现绿色可持续目标，与国 际标准无缝桥接
	挖掘美美与共文化新价 值	建立国际传播交流机制，推 动文化艺术跨界合作提质升 级

#### **4.1 观念维度：以美丽新质能引领美丽新潮流**

我们建议，融合美丽观念新创新，培育美丽认知新提升。具体来说：

- **促进全球新品交流，保持美妆行业活力：**建立海外采购渠道和贸易合作机制，鼓励企业引进全球新品，提升产品多样性和竞争力；支持举办国际化的美妆展览和交流活动，吸引国内外品牌和专业人士参与，促进行业发展。

- **促进美妆消费认知的多元化融合互动：**提供资金支持和政策倾斜，鼓励创新型美妆企业发展新零售、直播带货、社交电商等新模式；设立创业孵化基地，为初创企业提供场地、资金和导师支持，推动新业态的认知度和成长空间。

#### **4.2 行业维度：以美丽新质能激发美丽新活力**

我们建议，赋能产品、服务、体验等高品质提升，推动理念、技术、应用等换挡升级，激发创新、多元、个性等消费活力。具体来说：

- **鼓励美妆原料研发创新：**加大对美妆原料研发的资金投入，支持科研院所和企业开展原料技术研究，提高国内美妆原料自主研发能力；鼓励跨行业合作，将生物科技、纳米技术等前沿技术应用于美妆原料研发，推动产业升级和创新。

- **鼓励美妆科技高效转化和落地：**建立科技成果转化平台，促进科研成果与产业需求对接，推动科技成果向实际应用转化；提供税收优惠和政策支持，鼓励企业增加科技投入，推动美妆科技的高效转化和产业升级。

- **关注银发族和多元化群体的美丽需求：**支持针对不同年龄、肤质和文化背景的消费者需求，鼓励企业开发针对银发族和多元化群体的美妆产品。

#### **4.3 市场维度：以美丽新质能促进市场新繁荣**

我们建议，创造美丽消费供需新平衡，孵化美丽经济增长新生态。具体

来说：

- **适度放松监管，为消费品市场注入新活力：**在确保产品质量和安全的前提下，简化审批流程和减少行政审批成本，鼓励企业创新和产品更新换代；建立健全的监管体系，加强事中事后监管，提高监管效率和服务水平，保障消费者权益。

- **促进美妆链主链属企业深度合作：**资源共享，优势互补、共同发展；建立政府引导基金，支持大企业与初创企业之间的合作项目，降低合作门槛和风险。

#### **4.4 社会维度：以美丽新质能推动发展新理念**

我们建议，展现绿色发展新社会责任，挖掘“美美与共”文化新价值。具体来说：

- **实现绿色可持续目标，与国际标准无缝桥接：**鼓励企业采用环保材料和生产工艺，推动绿色美妆产品的研发和生产；加强与国际标准组织的合作，提升美妆行业的国际竞争力，推动行业向绿色可持续发展方向迈进。

- **建立国际传播交流机制，推动文化艺术跨界合作提质升级：**加强与各行各业间的合作，促进文化交流融合与跨界合作，赋能国际传播交流机制；组织国际性的美妆文化活动和展览，提升国际影响力，推动中国美妆产业走向世界。

### **五、展望：“蝴蝶效应”，势能无限**

从“美丽新势能”到“美丽新质能”——人类社会将从观念、行业、市场、社会“四维”上发生深刻变革。在这场“势”与“质”的变革中，美妆行业对人类社会的贡献度也将显著提升。

- **经济贡献：**数据显示，美容业为欧盟提供了约 360 万个工作岗位。美

妆行业涵盖了彩妆、护肤、个人护理、香水等多个领域，产值巨大。在相关部门的支持下，美丽新势能将使得产业链更加成熟，链上企业协同更加密切，还将创造了大量的就业机会。

- **社会文化影响：**美妆不仅仅是外表的修饰，更是一种文化和生活方式的体现。在相关部门的引导下，美丽新势能将让美妆产品和技巧在社会中扮演更加重要的角色，更为深度影响人们的审美观念、自我表达方式以及社交互动。

- **增强个人形象与自信心：**如今，约 63% 的女性认为化妆品能帮助她们更好地展现个性，48% 的女性认为化妆品能展现真实的自我。在相关部门的帮助下，美丽新势能将通过化妆、护肤等手段，让每个个体外观更自信，更加笃定塑造符合自己期望的形象，增强自信心，从而更积极地投入到工作、学习和社交中去。

- **国际交流与文化输出：**美妆产品和美妆文化在国际间的交流与传播促进了不同文化之间的交流与融合。当众多国家的美妆品牌通过产品出口和品牌营销、打造本国的文化代表时，美丽新势便能成为了一种世界语言，促进了国际间的文化输出与交流。

美妆不仅仅是一种装饰，更是一种信念和态度，也是对个体自我表达和身份认同的一种方式。它赋予人们自信和勇气，让他们敢于展现真我、追求卓越。创造美妆，能够激发人们的内在动力，引领着社会走向更美好的未来。美妆行业的兴起不仅仅是对外在美的追求，更是对内心美的呈现和传达。通过美妆，个体得以表达自我、展现魅力，这种自信和美丽的态度激励着更多人勇敢追求梦想、迎接挑战。

为发挥“美丽新势能”的无限潜力，从政策层面对美妆行业的支持不仅能

够以美丽新质能引领美丽新潮流，激发美丽新活力，促进市场新繁荣，推动发展新理念，更能为行业发展注入新的动力和活力，推动美妆行业朝着更加健康、环保、创新的方向迈进。

综上所述，越来越多美妆企业的典范效应涟漪到更多行业、让更多品牌、更多人群贡献更多美的智慧、美的力量。我们坚信，在中国发展新时代新机遇的沃土上，在所有美妆人和生态圈伙伴的共同努力下，通过政府培育和市场的进化，势能无限的美妆一定能成为消费领域最早扇动翅膀的那只美丽蝴蝶，为提振消费、扩大内需，为美好生活，为高质量发展贡献更大的“美丽新质能”。

# **From "New Beauty Momentum" to "New Beauty Quality"**

## **——Mindset, Industry, Market and Society "Four-dimensional Integration" to contribute to the high-quality development of the beauty industry**

### **Abstract**

Consumption plays a crucial role in modern society, which is not only the basis of economic activities, an important driving force for urban development and cultural prosperity, but also a reflection of the economic vitality and quality of life of a city and even a country. In recent years, the income level of China's residents has been continuously increasing, and the consumption demand is growing, personalized consumption and the pursuit of consumer goods quality have become the current trend in consumer demand changes.

With the deepening influence of rising national disposable income, gradual increase in the public's personal concept of beauty and skincare, higher level of technological innovation, awakening of women's independence, increasing awareness of health and sustainable development, social media influence and cross-border cooperation as well as flat-shot cooperation and other reasons, today's Chinese beauty market has grown into the world's second -largest cosmetics consumer market. China's beauty industry is gradually becoming one of the most dynamic industries in the consumer sector.

The rapid development of the beauty industry is a kind of kinetic energy derived from its own scale and speed, and at the same time, it is a powerful potential energy due to its location and height. This report focuses on the proposition of "new quality productive forces enabling the accelerated development of beauty industry", describing how beauty industry, by tapping into the kinetic energy of its own scale and speed, creates a "New Beauty Momentum" for the development of China's economy and society and becomes a source of power to promote China's high-quality development and meet people's aspirations for a better life.

New productivity promotes the prosperity of the consumer market. As an ecosystem in which momentum and potential energy are continuously positively circulating and mutually reinforcing, the "New Beauty Momentum" is essentially the best interpretation of the combination of the beauty industry and new quality productive forces. We believe that the combination of "new quality productive forces" and "New Beauty Momentum" can promote the upgrading of "New Beauty

Momentum" to "New Quality Productivity", and contribute to the high-quality development of the beauty industry.

Promoting the greenization and low carbon of economic and social development is the key in achieving high-quality development. The combination of "new quality productive forces" and "New Beauty Momentum", through promoting scientific and technological innovation of products and services, exploring the way of green low-carbon and sustainable development, expanding the cooperation models and the values of business ecology, building the soft power of culture and injecting diversity and inclusiveness into marketing and promotion, will reconstruct the consumer value and stimulate market innovation in both breadth and depth in terms of consumer concept and social significance.

It is necessary to start from the four dimensions of mindset, industry, market and society to activate the new quality productive forces and inject vitality into the promotion of high-quality development of the beauty industry for promoting the further development of the beauty industry. Therefore, we suggest that helping the beauty industry to continue to develop rapidly can start from the following four aspects, which are centered on the new quality energy of beauty: conceptualization, to lead the new trend of beauty with new beauty qualities; industry support, to stimulate new vitality of beauty with new beauty qualities; market cultivation, to promote new prosperity in the market with new beauty qualities; and social guidance, to promote the new concept of development with new beauty qualities.

We believe through the joint efforts of the government, the industry and the community, beauty with unlimited momentum will surely become the earliest butterfly to flaunt its wings in the consumer field, contributing greater "New Quality Energy of Beauty" to boosting consumption, expanding domestic demand, promoting a better life, and promoting high-quality development.

## **Main text**

### **1. Consumption has become the "main engine" of China's economic growth.**

As the global economy is gradually coming out of the negative impact of the COVID-19, various industries have ushered in a turning point of full recovery and strong growth. According to data, China's gross domestic product (GDP) exceeded RMB 126 trillion in 2023, a 5.2 per cent increase from 2022, placing it firmly in second place in the world.

At present, consumption has become the main engine that drives sustained economic growth. Data shows that in 2023, final consumption expenditure drove economic growth by 4.3 percentage points, an increase of 3.1 percentage points over the previous year, and contributed 82.5 per cent to economic growth, an increase of 43.1 percentage points, making the fundamental role of consumption even more significant.



During the Spring Festival of 2024, there were 474 million domestic tourism trips, with a total spending of 632.687 billion yuan; the box office of the Spring Festival exceeded 8 billion yuan, an increase of 18.47% year-on-year; and the sales of key retail and catering enterprises nationwide increased by 8.5% year-on-year. Behind these vivid consumption figures is the embodiment of both supply and demand in the consumer market, which also reflects the vitality of China's economy.

In recent years, policy guidance and structural reforms that have boosted market confidence, a growing middle class and affluent population, and the rapid development of digital infrastructure and the mobile Internet of Things have all contributed to the fundamental and critical role of consumption in economic development.

## **2. Beauty is one of the most dynamic sectors in the consumer sector**

### **2.1 Industry: a key force for high-quality economic development**

In recent years, the cosmetics industry has become a lighthouse industry in the consumer market, and China has become the second largest cosmetics market in the world. The cosmetics industry has been leading the broader market of total social retail sales. China's economy has doubled about 10 times in the 40 years since the reform and opening up, while the total retail sales of cosmetics has doubled about 29 times, and the beauty market has grown more than 1,000 times.

- **In the domestic demand boost** - consumers' upgraded desire for beauty gave rise to new consumer demand, and the cosmetics industry has steadily caught up with these demands through the supply-side reform, the industry and enterprises are also actively integrating across borders, and continue to open up new consumer experience and innovation model.

- **At the level of social influence** - development of the cosmetics industry has rooted in diverse socio-cultural and natural resources, and has a strong affinity with them. Beauty companies have taken on the responsibility of being the initiators and forerunners of many social issues and actions, thus becoming the backbone of China's inclusive and sustainable development.

### **2.2 Digitalisation: helping the cosmetics industry to soar**

Innovation and expansion have always been the key words in this industry.

- **The deep integration of beauty and digital intelligence technology has opened up a new career track for young people in China.** The digital transformation of enterprises is also helping more practitioners to transform and upgrade their careers, and China's digital leadership is allowing the beauty industry to breed world-class professionals and even masters.

- **Digitization moves towards digital intelligence, rapidly sensing the needs of mass consumption.** By collecting a large amount of consumer data from the bottom up and breaking through the online and offline data silos, big data analysis has become a necessary capability for consumer insights. In addition, beauty

companies can use data analysis to provide users with brands, products, services and experiences that interest them.

- **Beauty "Blackbox Technology" creates an intelligent product landscape.** Technology support is essential for testing and guidance tools, personalized beauty technology solutions, and sustainable beauty technology solutions. Through virtual make-up testing, AR technology, intelligent recommendations and other means, consumers can more conveniently understand and choose the right beauty products for themselves, and improve purchase satisfaction.

### **3. Transformation and upgrading from "New Beauty Momentum" to "New Beauty Quality"**

#### **3.1 The social background of "New Beauty Momentum"**

At present, China has taken "fulfilling aspirations of citizens for a better life" as its main goal, leading China's development to focus more on beauty. In recent years, the public consumption concept as well as the concept of aesthetics gradually upgraded and changed, more and more consumers began to pay more attention to their own external image, make-up gradually become more and more important. People's understanding of beauty has increasingly touched from the outside to the inside, from 'Beauty for others' to 'Beauty for me', beauty has become a self-consistency of the human beauty, consumers began to pursue "fashion" and "personality", beauty is also gradually carrying consumers to a better quality of life. Beauty also gradually carries consumers' desire for a better quality of life and helps consumers to show their personality.

The status and development of beauty industry in China is a mutual promotion of industry and socio-economic development, and a process of mutual conversion of kinetic and potential energy. On the one hand, the momentum of China's social and economic progress has created a broad potential space for the development of China's beauty industry; on the other hand, the momentum of the beauty industry's development has also become a constant source of potential energy for China's social development. We define this ecosystem of positive circulating and mutually reinforcing kinetic energy as the "New Beauty Momentum".

In order to constitute the result of complementary transformation between dynamic and potential energy, the beauty industry should firstly accumulate momentum in the process of its own development and evolution. At the same time, we also need to find a new track from the social development of the new wind mouth to take advantage of the momentum so as to provide the market, the industry and consumers with innovative ideas, products, services, experience, knowledge and unlimited aspirations for beauty and other multiple values.

#### **3.2 Four Dimensions and Ten Trends of the "New Beauty Momentum"**

Cultivating the development of new quality productive forces requires multi-dimensional synergy. In the next part of the recommendations, we will explain each

of the four dimensions and ten trends of the "Beautiful New Potential" to provide ideas and a basis for promoting the quality of consumption.

### **3.2.1 Aspect I: Mindset**

**Beauty carries consumers' aspirations for a better life and helps them to express their individuality and dare to create tomorrow.**

- **Trend 1: Price-savvy and cautious to express beauty → Active to pursue dream and quality**

The beauty industry is developing in the direction of high quality and diversification. With the continuous rise of per capita disposable income and the pursuit of quality of life by the society at large, domestic per capita cosmetic consumption points to a year-on-year increasing trend. At the same time, beauty and people's aspiring lifestyles are mutually reinforcing. The specialisation of product functions, the breadth of social media, and the high-end nature of beauty products will support consumers in their pursuit of higher levels of physical and mental health.

- **Trend 2: Beauty for others → Beauty for me**

The rise of consumers, especially female consumers, and the awakening of their self-confidence and unique aesthetic concepts are constantly changing consumer attitudes towards the pursuit of growth and individuality. In addition, along with the development of the Internet, the silver-haired people, men, disabled people and other groups are also constantly exposed to and understand the charm of fashion, and continue to move towards the centre of the "beauty spotlight".

China released a guideline at the beginning of 2024 for measures to further implement its national strategy to address population ageing and boost the sense of fulfilment, happiness and safety among the elderly, emphasizes the development of the anti-aging industry, and the deepening of the R&D and application of the skin aging mechanism and the human aging model in the field of anti-aging. Vigorously developing the anti-aging industry can not only expand the space for the development of the silver economy, but also meet the diversified anti-aging consumption needs of high-net-worth people and young groups, and promote the diversified development of social culture.

- **Trend 3: Beauty for self-healing for indulgence → Beauty for confidence to live better**

Currently, beauty has long been part of the consumer's good life. Beauty is no longer just a product of hedonism, it represents optimistic expectations and a sense of social desire to change and better oneself and society.

### **3.2.2 Aspect II: Industry**

**From the planned economy to the trend of marketization and technology in China, the beauty industry has continued to develop new consumer experiences and innovative models through organisational upgrading and digital intelligence innovation, accelerating its development while also and sharing the opportunities to more people.**

- **Trend 4: (size) Beauty with limited choices → beauty with diverse offers to beef up industry**

Today the beauty industry has gone from offering consumers few choices to launching a wide range of products with increasing influence. Data show that cosmetic sales have grown faster than the broader market, and their share in social retailing has continued to rise. In addition, beauty has become a flagship industry capable of driving regional development and building industrial clusters.

- **Trend 5: (innovation) Beauty-Silos growth → Beauty exploded with cross-over innovation**

China is being regarded as the most important strategic market in the world by more and more international enterprises. Currently, the cosmetics industry is developing from a single-development primary manufacturing industry to a modern light industry based on high quality, new patterns, great integration and innovation.

Through the innovation of organizational form, beauty enterprises undertake the greater impetus brought by science and technology, and actively explore new opportunities in the industry by virtue of the dual-track model of internal cultivation and incubation, and external investment and merger and acquisition, which also builds a broad platform for cross-border innovation for other industries.

- **Trend 6: (channel and beauty talent) Single traditional retailing model with BA → Omni-Channels fueled diversified job needs**

The deep integration of beauty and digital intelligence technology has opened up a new career track for the beauty business to Chinese young people, and the digital transformation of the enterprise is also helping more practitioners to achieve career transformation and upgrading, and helping them to break the ceiling of their careers.

### **3.2.3 Aspect III: Markets**

**As one of the industries closest to young consumers and with the highest level of marketisation, the beauty market has truly entered an era of blossoming and high-quality development with the co-evolution of enterprises and the market, as well as the synergistic upgrading of market supply and demand**

- **Trend 7: Beauty as non-essential product driven by supply → Beauty as life necessity driven by demand**

Currently, cosmetics are gradually transforming from supply-driven icing on the cake of non-essentials to demand-driven must-have consumer products, and brand and consumer co-creation are driving reverse product innovation. Compared to the passive consumers of the last century who received brand and product messages, the new generation of young people has the ability and interest to actively understand and express and contribute ideas for their own needs.

- **Trend 8: Giant rules the market → Everyone has chance to shine**

The development of cosmetics is stepping into the era of benign development of blossoming. Driven by the Internet, digital economy, etc., China's cosmetics market continues to open and expand, business policies are emerging, market regulation is

also increasingly up-to-date, more and more in line with international standards, in recent years, China's existing cosmetics-related enterprises 14,767,400, more than 90 per cent of the enterprises were established within five years.

#### **3.2.4 Dimension IV: Society**

**The development of beauty is rooted in diverse social cultures and natural resources, and thus has a natural sense of social needs and environmental issues. Coupled with beauty's inherent affinity, beauty companies have naturally taken on the responsibility of being the initiators and forerunners of many social issues and actions, thus becoming the backbone of China's inclusive and sustainable development.**

- **Trend 9: Exclusively hers → Sharing and inclusion**

As China enters a new stage of development, inclusion and diversity have become a must, and empowering women is particularly noteworthy, as women are no longer confined to contributing to their families, but also to making beautiful contributions to economic and social development.

- **Trend 10: Prioritizing Growth with Responsibility → Green Pioneers for a Better Planet**

The development goals of beauty companies have achieved a transition from pursuing short-term financial performance to sustainable, high-quality development. As one of the industries closest to consumers, beauty has a great influence on shaping people's consumption philosophy and values. Through our own transformation, we are driving upstream, downstream and consumers to put sustainable consumption into action.

### **3.3 "New Beauty Momentum" provides a "vivid footnote" to the new quality of productivity in the beauty industry.**

#### **3.3.1 What is new quality productive Forces**

The consumption structure of China's residents is constantly upgrading, and people favour products with high technological and cultural content, easy to use, and more beautiful and qualitative products. In September 2023, President Xi Jinping proposed the term "new quality productive forces" for the first time during his visit to Heilongjiang, pointing out the direction for the integration of scientific and technological innovation resources, and the development of strategic emerging industries and future industries. New quality productive forces are the result of technological revolution. The new quality productivity is the contemporary advanced productive force generated by revolutionary breakthroughs in technology, innovative allocation of production factors, and in-depth transformation and upgrading of industries, which takes the qualitative change of workers, means of labour, objects of labour, and their optimal combinations as the basic connotation, and the enhancement of total factor productivity as the core symbol.

#### **3.3.2 "New Quality Productive Forces" and "New Beauty Momentum"**

New productivity and consumption are intertwined, and from 2021 to 2025, the

CAGR of the technology-enabled beauty industry could reach 17.1 per cent. If we can deepen the application of new technology as the driving force of new quality production, empowering the beauty industry, will further inject new vitality and power for the entire beauty industry, that is, to further unleash the "New Beauty Momentum".

- Through scientific and technological innovation and innovation in production factors, enterprises are able to develop more attractive and competitive products to **meet people's changing needs and preferences**. Low-carbon, environmentally friendly and renewable design concepts, personalised and customised services and shopping experiences that ignite consumer scenarios provide consumers with more diversified and segmented choices, thereby promoting the development and growth of the consumer market.
- Through integration with new quality productivity, the beauty industry can achieve **more efficient production and management, and improve product quality and innovation**. Such innovation not only meets consumer demand for personalised and high-quality products, but also brings new growth points and competitive advantages to the beauty industry.
- New quality productive forces will also **promote the upgrading and transformation of the beauty industry chain**. From the research and development of raw materials to the design and manufacture of products, to the expansion of sales channels and the innovation of marketing methods, all will benefit from the empowerment of new technologies. This will further contribute to the formation of an ecosystem for the beauty industry, forming a virtuous cycle and mutual promotion.

#### 4. Core policy recommendations

There is also an interaction between technological innovation and changes in social institutions that drive society forward. New quality productive forces promote the prosperity of the consumer market. By promoting technological innovation in products and services, exploring ways of sustainable development, expanding the value of cooperation models and business ecology, as well as injecting diversity and inclusiveness into marketing and promotion, the market will be stimulated to innovate. Therefore, we propose to work with the four dimensions of the New Beauty Momentum, so as to further activate the new quality productivity and support the high-quality development of the beauty industry.

**Figure 1: Core policy recommendations**

<b>Government Role</b>	<b>Thrust</b>	<b>Policy recommendations</b>
Mindset: Leading the new trend of beauty	New innovations in the concept of integration of beauty	– Promote the exchange of new products globally and maintain the vitality of the

with the new quality energy of beauty		beauty industry.
	Cultivating new enhancements in the perception of beauty	– Promote the diversified integration and interaction of beauty consumption perceptions.
Industry: Inspiring New Vitality for Beauty with New Quality Energy for Beauty	Enabling high-quality enhancement of products, services, experiences, etc.	– Encourage R&D and innovation in beauty ingredients;
	Promote concepts, technologies, applications and other upgrades	– Encourage efficient conversion and landing of beauty technology.
	Stimulate innovation, diversity, individuality and other consumer vitality	– Achievement of green sustainability goals and seamless bridging to international standards
Markets: Promoting New Market Prosperity with Beautiful New Quality Energy	Creating a new balance between supply and demand for beauty consumption	– Moderate deregulation to inject new vigour into the consumer goods market;
	Incubating new ecosystems for beautiful economic growth	– Promote cooperation between large companies and start-ups: Promote in-depth cooperation between companies belonging to the main chain of the beauty chain.
Society: Promoting new concepts of development with new qualities of beauty	Demonstrating new social responsibility for green development	– Focus on the beauty needs of silver-haired and diverse groups;
	Tapping into the new value of MMT culture beauty in common	– Establish an international communication and exchange mechanism to promote cross-border cooperation in cultural and artistic fields for quality enhancement.

#### **4.1 Mindset Dimension: Leading the new trend of beauty with the new quality energy of beauty**

We propose to integrate new innovations in beauty concepts and cultivate new enhancements in beauty perceptions. Specifically:

- **Promoting global new product exchanges to maintain the vitality of the beauty industry:** The Government has established overseas procurement channels and trade cooperation mechanisms to encourage enterprises to introduce global new products and enhance product diversity and competitiveness; it supports the organisation of international beauty exhibitions and exchanges to attract the participation of domestic and foreign brands and professionals to promote the development of the industry.
- **Promote the diversified integration and interaction of beauty consumption perception:** provide financial support and policy inclination to encourage innovative beauty enterprises to develop new modes such as new retail, live streaming with goods and social e-commerce; set up business incubation bases to provide venues, funding and mentor support for start-ups, and to promote the perception of the new industry and the space for growth.

#### **4.2 Industry dimension: Inspiring New Vitality for Beauty with New Quality Energy for Beauty**

We propose to enable high-quality enhancement of products, services, experiences, etc, promote concepts, technologies, applications and other upgrades, Stimulate innovation, diversity, individuality and other consumer vitality. Specifically:

- **Encouragement of R&D and innovation in beauty ingredients:** Increase the financial investment in R&D of beauty ingredients, support research institutes and enterprises to carry out research on raw material technology, and improve the independent R&D capability of domestic beauty ingredients; encourage cross-industry co-operation, and apply biotechnology, nanotechnology and other cutting-edge technologies to the R&D of beauty ingredients, so as to promote industrial upgrading and innovation.
- **Encourage the efficient transformation and landing of beauty science and technology:** establish a platform for the transformation of scientific and technological achievements, promote the docking of scientific research achievements with industrial demands, and promote the transformation of scientific and technological achievements into practical applications; provide tax incentives and policy support to encourage enterprises to increase their investment in science and technology, and to promote the efficient transformation of beauty science and technology and the upgrading of the industry.
- **Build an inclusive and sustainable future, with a focus on the silver-haired and diverse groups:** support the development of beauty products for the silver-haired and diverse groups in response to the needs of consumers of different



ages, skin textures and cultural backgrounds, and encourage enterprises to develop beauty products targeting the silver-haired and diverse groups.

#### **4.3 Market Dimension: Promoting New Market Prosperity with Beautiful New Quality Energy**

We propose to create a new balance between supply and demand for beauty consumption and incubate a new ecosystem for beautiful economic growth. Specifically:

- **Moderate deregulation to inject new vigour into the consumer goods market: on the premise of ensuring product quality and safety, streamlining the approval process and reducing administrative approval costs to encourage enterprise innovation and product renewal; establishing a sound regulatory system, strengthening supervision during and after the event, improving regulatory efficiency and service levels, and safeguarding consumer rights and interests.**
- **Promote in-depth cooperation among enterprises belonging to the main chain of the beauty chain: share resources, complement each other's strengths and develop together; establish a government-guided fund to support cooperation projects between large enterprises and start-ups, and reduce the threshold and risks of cooperation.**

#### **4.4 Social Dimension: Promoting new concepts of development with new qualities of beauty**

We propose to tap into the new connotative value of "beauty for all" and demonstrate a new social responsibility for green development. Specifically:

- **Achieve green and sustainable goals and bridge seamlessly with international standards: encourage enterprises to adopt environmentally friendly materials and production processes, and promote the research, development and production of green beauty products; strengthen cooperation with international standards organisations, enhance the international competitiveness of the beauty industry, and promote the industry's progress towards green and sustainable development.**
- **Establishing an international communication and exchange mechanism to promote cross-border cooperation in cultural and artistic fields for quality enhancement: Strengthen cooperation with various industries, promote cultural exchanges and fusion and cross-border cooperation, and empower the international communication and exchange mechanism; organize international beauty culture activities and exhibitions, enhance international influence, and promote China's beauty industry to the world.**

### **5. Outlook: "Butterfly effect", unlimited potential**

From "beautiful new potential energy" to "beautiful new quality energy" - human society will be from the mindset, industry, market, society "four-dimensional "The

human society will undergo a profound change from the concept, industry, market and society. In this "potential" and "quality" of change, the beauty industry's contribution to human society will be significantly increased.

- **Economic contribution:** Figures show that the beauty industry provides around 3.6 million jobs in the EU. The beauty industry covers a wide range of fields such as colour cosmetics, skincare, personal care and perfume, with a huge output value. With the support of the relevant departments, the new potential of beauty will make the industry chain more mature and the synergy of enterprises in the chain closer, and will also create a large number of jobs.

- **Socio-cultural impact:** Beauty is not just about appearance, it is also a reflection of culture and lifestyle. Under the guidance of the relevant authorities, the New Beauty Momentum will enable beauty products and techniques to play a more important role in society, and more deeply influence people's aesthetic concepts, self-expression and social interactions.

- **Enhancement of personal image and self-confidence:** Today, some 63 per cent of women believe that cosmetics help them to better express their personality, and 48 per cent believe that they reveal their true selves. With the help of the relevant departments, the New Beauty Momentum will, through make-up and skincare, enable each individual to look more confident, to be more certain of creating an image that meets their expectations, and to enhance their self-confidence, so that they can be more actively involved in their work, study and social life.

- **International exchanges and cultural exports:** The international exchange and dissemination of beauty products and beauty culture promote exchanges and integration between different cultures. When beauty brands from many countries export their products and brand marketing, and create cultural representatives of their own countries, the New Beauty Momentum becomes a world language and promotes international cultural exports and exchanges.

From a cultural point of view, beauty is not only a kind of decoration, but also a kind of belief and attitude, as well as a way of self-expression and identity for individuals. It empowers people with self-confidence and courage, allowing them to dare to show their true selves and pursue excellence. Creating beauty can inspire people's inner motivation and lead society to a better future. The rise of the beauty industry is not only about the pursuit of external beauty, but also about the presentation and communication of inner beauty. Through beauty, individuals are able to express themselves and show their charisma, and this attitude of confidence and beauty inspires more people to bravely pursue their dreams and meet challenges. To unleash the infinite potential of "Beauty New Momentum," support for the cosmetics industry at the policy level not only leads the trend with fresh beauty qualities, but also stimulates new vitality, promotes market prosperity, advances new ideologies, and injects new impetus and vigor into industry development. This

fosters the cosmetics industry towards a healthier, more environmentally friendly, and innovative direction.

To sum up, the exemplary effect of more and more beauty enterprises ripples to more industries, allowing more brands and more people to contribute more beauty wisdom and power. We firmly believe that in the fertile soil of new opportunities in the new era of China's development, under the joint efforts of all beauty people and ecosystem partners, through the government's cultivation and the evolution of the market, the infinite potential of beauty will become the earliest beautiful butterfly flapping its wings in the field of consumerism, and will contribute to the boosting of consumption, the expansion of domestic demand, and a better life, contributing to the high-quality development of the greater "beautiful new quality energy".