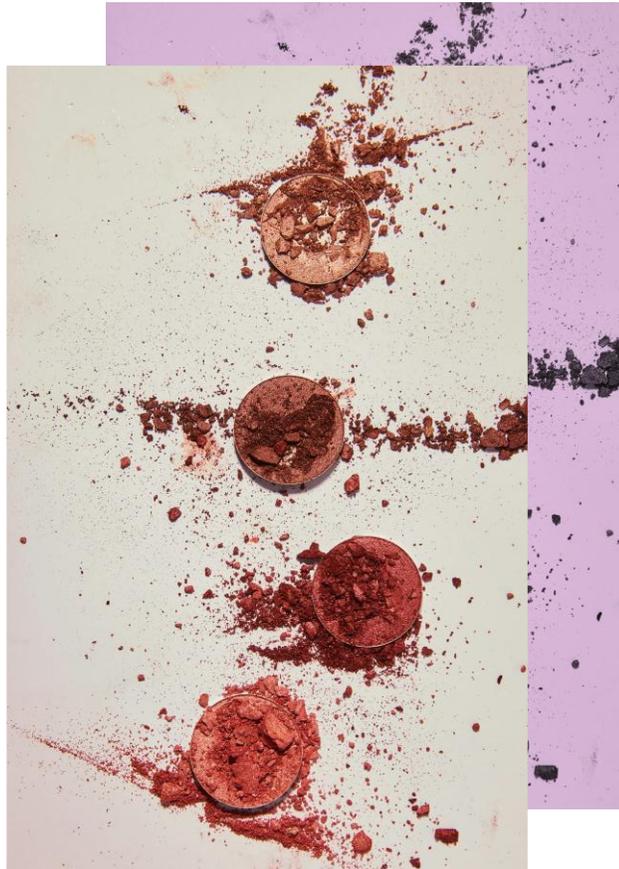


China Beauty Trends 2026



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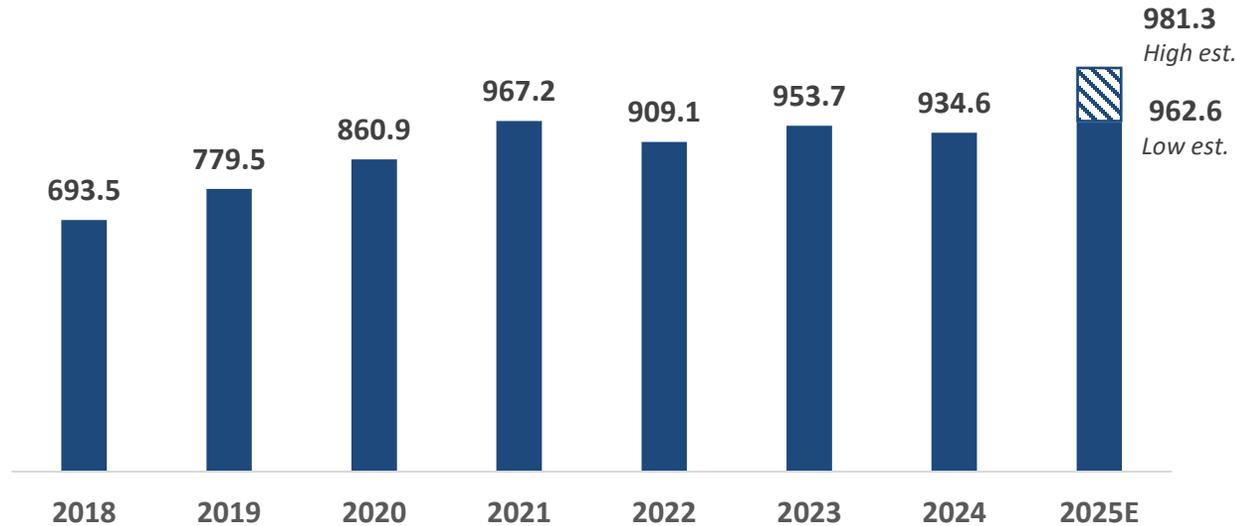
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CHINA'S BEAUTY MARKET OVERVIEW: 2026 WILL BE A REBOUND

CHINA'S NATIONAL STATISTICS BUREAU REPORT ON CONSUMER SPENDING INDICATED A 4.8% YOY GROWTH OF COSMETICS PURCHASES FROM JAN-NOV IN 2025.

The Chinese beauty market size 2020-2025
(in Billion RMB)



Chinese beauty market segmentation and growth

	Market share 2024	CAGR 2018-2023
Skincare	41%	8.4%
Personal care	22%	5.8%
Make up	11%	4.7%
Fragrances	3%	15.0%
Other	23%	6.6%



BEAUTY CATEGORY TRENDS

#1 HIGH-END BEAUTY IS REACHING LOWER-TIER CITIES IN MULTI-CHANNELS

BRANDS PENETRATE THE MARKET THROUGH THEIR OFFICIAL FLAGSHIP STORES AND A DISTRIBUTION NETWORK, INCLUDING RETAILERS LIKE SEPHORA AND INDIVIDUAL COSMETICS SHOPS.

Official stores

In recent years, more mid-to-high-end skincare, beauty, and fragrance brands have begun focusing on lower-tier market expansion, opening flagship stores in premium malls in third-tier cities.

CHANEL



📍 Xuzhou, Jiangsu

📖 Tier 3



CLARINS

📍 Wuhu, Anhui

📖 Tier 3



LA MER

📍 Xuchang, Henan

📖 Tier 3



Multi-brand stores

In areas not yet covered by brand flagship stores, various distributors provide consumers in lower-tier markets with greater accessibility to major beauty and skincare products.

Sephora

SEPHORA

📍 Wenzhou, Zhejiang

📖 Tier 3



The fragrance brand I like only opens in tier 1 cities, but thanks to Sephora I can at least try some.
我喜欢的香水只有一线城市有旗舰店，还好有丝芙兰可以先试闻几款。

Self-operated cosmetics store



Small town beauty store is actually more reliable than imagined. They will always have good price for regulars.
县城美妆店比想象中靠谱，作为熟客在这里消费还是很划算的

#2 DIGITAL TREND: DOUYIN AS THE GROWTH ENGINE

THROUGH VIRAL SHORT DRAMAS, A 24-HOUR LIVESTREAM MATRIX AND TIERED PRICING, KANS' DOUYIN STRATEGY DRIVES IT TO THE NO.1 SPOT.

Top 10 skincare brands across mainstream e-commerce platforms by sales revenue (Jan. 2025-Sep. 2025)

Rank	Brand	Sales revenue* (Billion RMB)
1	Kans韩束	5-10
2	Proya珀莱雅	5-10
3	L'Oreal	4-5
4	Lancome	4-5
5	Estee Lauder	3-4
6	La mer	3-4
7	SK-II	3-4
8	Helena Rubinstein	2-3
9	Kefumei可复美	2-3
10	Olay	2-3

* Total sales revenue estimated across e-commerce platforms including Tmall, Taobao, JD, Douyin and Red



Based on its **outstanding performance on Douyin**, Kans (Han Shu) won the TOP1 spot in the skincare category on the mainstream e-commerce platform. From January to September this year, Han Shu's GMV on the Douyin e-commerce platform exceeded **4.1 Billion RMB**.

Key strategies on Douyin

1 Content innovation: Mini-drama marketing

Kans pioneers a new "story-driven sales" model. Its series of short dramas is estimated to have achieved nearly **5 billion** views, and the "Kans Red Waist Gift Box," which was featured in these dramas, sold over **1.5 million** sets across all channels, topping multiple Douyin charts.



2 Livestream Matrix

A 24-hour rotating broadcast system was adopted, **differentiating product lines on self-broadcasting accounts** (the flagship store primarily promoted the White Waist series, while other accounts focused on anti-aging products).



3 Pricing & Product Size

The Red Waist Anti-Aging Gift Box was originally priced at 399 RMB. By combining "**full-size product + samples**," the unit cost was reduced, lowering the average order value from 239 RMB in 2024 to 180 RMB in 2025, targeting consumers in lower-tier markets.



#3 OUTDOOR BEAUTY: BLENDING ACTIVE LIFESTYLES WITH ADVENTURE-PROOF COSMETICS 1/2

WHILE OUTDOOR ACTIVITIES ARE STILL HOT TOPICS, THE DEMAND FOR OUTDOOR BEAUTY PRODUCTS ENCOURAGED BOTH OUTDOOR SPORTS BRANDS AND BEAUTY BRANDS TO EXPLORE THE NEW AREA OF “OUTDOOR DURABLE BEAUTY”.

2025 Jan - Jun

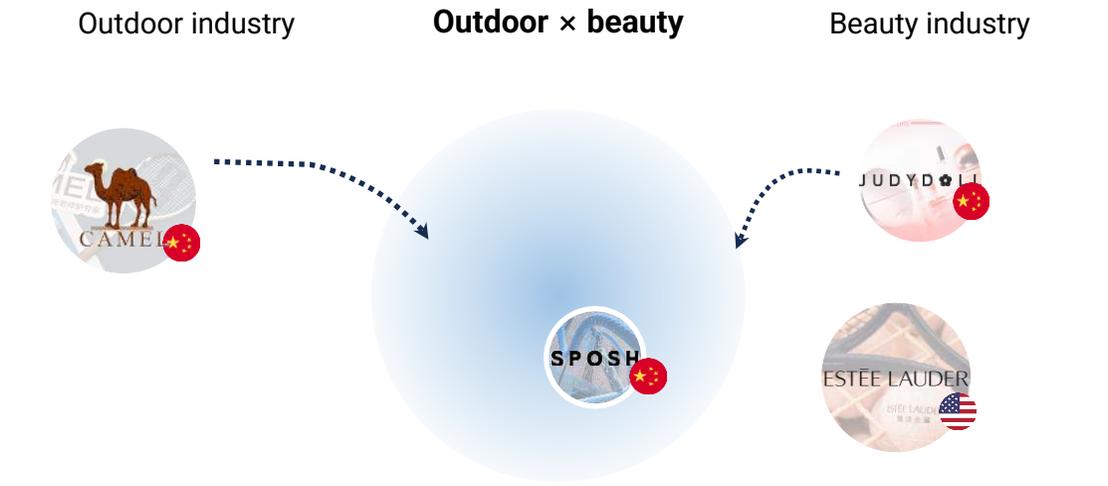
1.06 million posts about outdoor sports on weekends

> 70 million interactions

Above posts have been seen **> 7.6 billion** times



“Running is not just for health, but for a better version of yourself. Sporty makeup is actually a balance; it’s never about “being over”, but about keeping myself confident and comfortable while exercising.
 跑步不仅是为了健康，更是为了更好的自己。运动美妆其实是一种平衡，它不是为了“浓妆艳抹”，而是为了让自己在运动时也能保持自信和舒适。”



#3 OUTDOOR BEAUTY: OUTDOOR BEAUTY IN DIFFERENT PRICE RANGE

2/3

CHINA'S BEAUTY MARKET IS SEEING A CROSSOVER BOOM WHERE OUTDOOR BRANDS ENTER SKINCARE, BEAUTY LABELS EXPAND INTO OUTDOOR LINES, TO CREATE PRODUCTS AND EXPERIENCES TAILORED FOR ACTIVE, OUTDOOR LIFESTYLES.

Outdoor brands go beauty



CAMEL make-up products

Intro time: 2025 Jan

¥20-150

Best-sellers



Sunscreen



Repairing



Cleanser



Make-up



Official Channel

Outdoor beauty brands



SPOSH outdoor beauty

Intro time: 2024 Dec

¥100-250

Make-up



Skincare



Online promotion



Offline promotion



Beauty brands go outdoor



JUDYDOLL Live lines

Intro time: 2025 May

¥25-45

Make-up



ESTEE LAUDER themed event

Intro time: 2025 Mar

¥470

Make-up



Offline promotion



#4 SINK AESTHETICS: A STAGED DISPLAY OF ASPIRATIONAL AUTHENTICITY

BY DISPLAYING CAREFULLY CHOSEN BRANDS IN ARTFULLY COMPOSED SETTINGS, SINK AESTHETIC CULTIVATES AN AURA OF UNDERSTATED ELEGANCE, WHICH HAS EVOLVED INTO A REFINED AND HIGHLY EFFECTIVE FORM OF DISCREET MARKETING.



What's on the sink?



For consumers

Low-key affluence

Consumers seek low-key ways to signal taste and purchasing power with certain high-end brands.

Aesthetic currency

Products should better be nicely designed and visually shareable, as every component becomes potential stage dressing.



For brands

Vibe marketing

Marketing focuses on creating resonant emotional moments and desirable context that transcend mere product demonstration.

Calculated authenticity

Brands strategically employ "imperfect" natural aesthetics to create relatable narratives that enhance consumer engagement.

Brands which leverage on sink aesthetics:



Turning the sink into a hidden little treasure and seeing the richness of life is such a simple pleasure for a grown woman.
把洗手台打理成宝藏，从洗手台看见生活的丰盛，是成年女人的小小浪漫

#5 DARK TECH IN BEAUTY: HIGH-TECH IN BEAUTY INDUSTRY ECOSYSTEM

REFERRING TO ADVANCED, CUTTING-EDGE TECHNOLOGIES, SUCH AS AI SKIN ANALYSIS AND WEARABLE DEVICES, SKINCARE “DARK TECH” INTEGRATED INTO PRODUCTS AND SERVICES TO DELIVER HIGHLY PERSONALIZED, PROFESSIONAL-LEVEL CARE.

Product development & device manufacturing

Professional skin diagnostics and clinic-level aesthetic repair and lifting are expected.



3D D9 Skin Imaging Analyzer from ISEMECO

- AI-powered skin analysis
- Multi-spectral imaging
- 3D facial modelling

AMIRO U1 UltraLift from Amiro



- AI-assisted guidance
- SMAS targeting
- Ultrasound

Retail, experience & marketing, communication

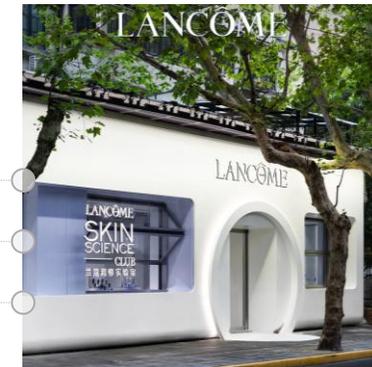
Emphasizing and showcasing the brand’s deep-rooted research and development expertise is the primary focus.



Re-Nutriv Revitalizing Supreme+ Aurora Mask from Estée Lauder

- AI-powered skin analysis
- Light-based therapy

Skin Science Club from Lancome



- Skin analysis
- Skincare experiments
- Personalized skincare plan

#6 REGULATION CHANGE: ALLOWING PERSONALIZATION

AFTER THE FIRST PILOT IN 2022, SEVERAL BRANDS LAUNCHED PERSONALIZED SERVICES. THE SECOND PILOT, STARTING IN 2025, BRINGS NEW OPPORTUNITIES FOR SKINCARE AND COSMETICS BRANDS.

2022. Nov

Pilot Work Procedures and Requirements for Personalized Cosmetic Services was issued by the **National Medical Products Administration (NMPA)** in 2022.

根据国家药监局在2022年发布的《化妆品个性化服务试点工作流程及要求》：
 (一) 试点工作应当不突破《化妆品监督管理条例》及其配套部门规章的规定，在国家药监局事权调整范围内实施。
 (二) 试点实施个性化服务的化妆品产品应当为普通化妆品，不包括特殊化妆品、儿童化妆品和使用新原料的化妆品；
 (三) 试点工作应当符合公众消费需求，具备社会推广价值。

2023. Apr



In 2023 Apr, L'Oréal China launched SkinCeuticals' CUSTOM D.O.S.E personalized serum service after receiving China's first on-site customization license.

2023. Jul



In 2023 Jul, COSE opened China's first pilot store for personalized skincare, offering AI-driven skin analysis and customized products.

2024. Oct



In late 2024, Bloomage Bio introduced an AI-based personalized skincare service, enabling custom products in just 20 minutes.

2025. Sept

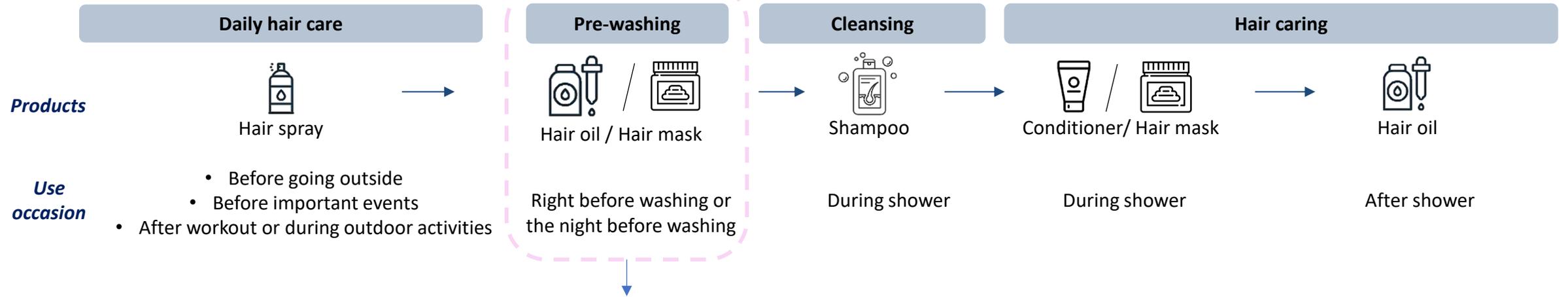
Requirements for the Pilot Program of Personalized Cosmetic Services was issued by the **National Medical Products Administration (NMPA)** in 2025.

一、自2025年10月1日起，参与试点的化妆品备案人或委托境内备案人授权的境内责任人可以在其设立的专卖店、直营店等经营场所，根据消费者的个性化需求，现场自行开展除特殊及以上已备案普通化妆品的小批量定制，分装等服务。试点期限为2年。
 二、个性化服务试点工作应当遵循“需求导向、安全可控、规范有序”原则，符合《化妆品个性化服务试点工作要求》（见附件）。参与试点的化妆品监督管理部门应当结合本行政区域实际，制定试点实施方案，严格控制试点规模，坚持“稳中求进”的原则，选择社会信用良好、质量管理体系完善、有一定工作基础和技术储备的化妆品备案人或境内责任人参与试点工作。
 三、参与试点的化妆品备案人或境内责任人，应当将提供个性化服务的经营场所纳入化妆品备案人的质量管理体系，建立保障个性化服务产品质量安全的管理制度，鼓励采用智能化设备和技术等为消费者提供个性化服务。
 四、鼓励参与试点的化妆品监督管理部门积极探索创新个性化服务模式，建立个性化服务全过程监管体系，有效防范质量安全风险，及时解决试点工作中的难点问题。重大问题及时报告国家药监局。
 五、国家药监局将加强对试点工作的指导和监督，建立试点工作沟通交流机制，根据试点工作情况适时调整试点范围；发现存在问题的，要求参与试点的化妆品监督管理部门及时整改，未按要求整改的将被停止试点工作。

#7 EXPANSION OF CONSUMER HAIRCARE ROUTINES – THE PRE-WASH RITUALS

CONSUMERS ARE UPGRADING THEIR “BEFORE SHAMPOO” STEPS, SEEKING TARGETED TREATMENTS THAT SIGNAL SOPHISTICATION AND SELF-CARE.

New haircare routines



Pre-wash products trending on social media in 2025: Searches for “pre-wash essential oil”, “pre-wash hair mask” growing strongly. There are ~10k posts across platforms with 10% yoy growth

Key drivers

- Growth of sensitive scalp concerns
- Rising interest in “quiet luxury” wellness rituals
- Influence from niche haircare brands and aromatherapy content

Top-mentioned products



SUDTANA. Pre-washing oil



My organics Pre-washing oil



PHILIP. B. Pre-washing oil



FRAGRANCE TRENDS

#1 TRENDING SCENTS: FLORAL REMAINS ON TOP, SPICE IS OUT

CHINESE CONSUMERS PREFER LIGHT FLORAL, FRUITY, AND WOODY SCENTS. MOST CONSUMERS HAVE A LOW TOLERANCE FOR OVERLY SWEET OR PUNGENT FRAGRANCES.

Top fragrances choices of Chinese premium fragrance consumers



Floral #1



Fruity #2



Woody #3



Oriental #4



Aquatic #5

Most negative comments on scents were on:

Overly Spicy Scents

Overly spicy and pungent fragrances are often considered too aggressive for daily wear or professional settings.

“Hermès Terre d'Hermès is not recommended for beginners. The scent feels overwhelming at first, with a noticeable spicy note. It also has a slight sting, which persists for over ten minutes.
爱马仕大地新手慎用，感觉一开始味道好大。而且味道感觉有点辛辣。然后有点呛，过了十多分钟还呛。”

- Chinese netizen

Sweet & Greasy Scents

Overly sweet fragrances are often perceived as a hallmark of low-end perfumes.

“While tidying up today, I found some Black Opium gathering dust in the corner... Back then, I must've seen so many people raving about how Black Opium gets you high when you spray it... So I gave it another spritz. It really does get you high—sweet to the point of cloying...
今天整东西在角落里发现了在吃灰的黑鸦片...当初应该是看到很多人说黑鸦片喷了上头入的...又喷了喷真的上头甜到发腻...”

- Chinese netizen

#2 SOLID FRAGRANCE: CHINA'S FASTEST-RISING FORMAT

CULTURAL FAMILIARITY, FUNCTIONAL USAGE, AND SUBTLE SCENT ARE REDEFINING HOW YOUNG CHINESE WEAR FRAGRANCE.

*Solid fragrances (香膏) have seen explosive growth, with sales jumping **541.48%** in 2025*

Consumer drivers

- 1 **Portable & Practical**
 - Easy to carry in bags or pockets, non-spill.
 - Fits commuting, school, office and travel scenarios.
- 2 **Low-key and subtle scent**
 - Softer, skin-close compared to traditional spray perfumes.
 - Appeals to consumers who want to “wear scent” without being too noticeable.
- 3 **Strong cultural fit**
 - Solid balms have historical roots in Chinese traditional fragrance culture.
 - Feels more familiar and less “foreign” than Western-style EDP/EDT.
- 4 **More affordable price point**
 - Popular among students and lower-tier city consumers.
- 5 **All-season usage**
 - Performs better in humid summers (less alcohol, slow diffusion).
 - Can be layered or reapplied easily in winter.

Format trend: The rise of “perfume pens” (香膏笔)

- Slim, playful, pen-like designs drive curiosity
- Strong virality on Douyin/Xiaohongshu due to demo-friendly format
- Appeals to Gen Z, who prefer portable and fun product designs



Top-mentioned products



Diptyque solid perfume



To summer solid perfume



Miss Dior Jelly perfume

#3

INGREDIENT-SAVVY CONSUMERS DRIVE DEMAND FOR HIGH-PURITY ESSENCES IN CHINA

AS THE MARKET MATURES, FRAGRANCE USERS SHIFT FROM FINISHED SCENTS TO RAW MATERIALS, FUELING A NICHE BUT FAST-GROWING “ESSENCE ECONOMY.”

Maturing fragrance users



Rising interest in purity & origin

- As consumers become more educated, they look beyond the bottle to **ingredient quality, concentration level, and sourcing.**
- Pure essences (香精), especially rich, long-lasting Middle Eastern styles, gain traction.
- This mirrors early “niche fragrance discovery” phases in Western markets, where enthusiasts explore ingredients to understand identity and longevity.

Pure essence matches with consumers needs in 2025

- | | | |
|-------------------------|---|--|
| I want something unique | → | Essence feels niche, rare |
| I want performance | → | Longer-lasting, richer scent |
| I want value | → | Small vials offer premium ingredients at accessible cost |
| I want to personalize | → | Mixing and layer-friendly format |



You can always trust essences from Dubai. Without Dubai’s essences, there would be no French perfumes. Dubai essences smell great, contain no alcohol, and are affordable. Highly recommended for anyone leveling up their fragrance journey.

- Chinese perfume user



Channel dynamics: Douyin at the center



- Douyin livestream sellers (private sellers/daigou living in the Middle East) introduce niche essences through sampling packs and direct demos
- “Middle Eastern essence haul” and “Pure essence intro 香精入门” become trending topics.

#4 FRAGRANCE AS A WELLNESS TOOL: TOP FUNCTIONAL NEEDS IN CHINA

CHINESE CONSUMERS INCREASINGLY TREAT FRAGRANCE AS A FUNCTIONAL WELLNESS TOOL, NOT JUST A LUXURY ACCESSORY, SHIFTING BRAND NARRATIVES FROM “SMELL GOOD” TO “FEEL BETTER.”

Top functional needs in China’s fragrance conversations

Anti-anxiety & Emotional soothing

- Fragrance is treated as a “portable mood stabilizer” by young office workers and students.
- Social media content often describes perfume as a **self-soothing ritual**, a way to decompress at work, between meetings, or before sleep.
- Consumers trust natural, herbal, and aromatherapy narratives more than abstract branding.

Focus & Productivity boost

- Popular among students (e.g. “Master exam prep perfume 考研香”), designers, and young professionals.
- Perfume is framed as a **mental clarity tool**, similar to coffee or functional beverages.
- Citrus-forward fragrances are described as “cleaner,” “sharper,” and more energetic.

Sleep support & Bedtime ritual

- “Bedtime perfume” is a major social media content category.
- Users enjoy creating **night rituals** with scent, layering perfume with pillow spray and diffuser.
- Preference leans toward warm, soft, milky notes that create a cocooning effect.

Top-mentioned ingredients



Lavender
(薰衣草)



Chamomile
(洋甘菊)



Sandalwood
(檀香)

Top-mentioned ingredients



Bergamot
(佛手柑)



Lemon
(柠檬)



Peppermint
(薄荷)

Top-mentioned ingredients



Vanilla
(香草)



Tonka Bean
(零陵香豆)



Musk
(麝香)



Helps me relax during OT... spraying it before bed gives instant peace.

- Chinese perfume user



This is my morning-focus perfume. One spray = brain turns ON.

- Chinese perfume user



Spraying this before sleep feels like wrapping myself in a warm blanket.

- Chinese perfume user

#5

HOME FRAGRANCE DEVICES RISE WITH SMART HOME INTEGRATION

HOME FRAGRANCE IS SHIFTING FROM A “NICE-TO-HAVE LIFESTYLE ACCESSORY” TO A SMART HOME WELLNESS APPLIANCE, DRIVEN BY PERSONALIZATION, AUTOMATION, AND AESTHETIC LIVING TRENDS.



Category momentum: home fragrance becomes a scalable market

- China’s home fragrance market reached **RMB 25 billion in 2023** and is expected to **surpass RMB 30 billion by 2027**
- Growth is driven by rising demand for **home ambiance, WFH routines, and aesthetic living** in Gen Z and young professionals
- Aroma diffusers (香薰机) are becoming mainstream household devices alongside lighting and air purifiers

Smart aroma devices enter the mainstream

- **Smart aroma diffusers** integrating **AI scent blending** and **IoT control** are emerging as the next product wave
- Users can control scent intensity, diffusion timing, and mood presets via apps or voice assistants
- The smart aroma device market is projected to reach **RMB 8 billion by 2030**, indicating strong upgrade demand

What Chinese consumers want



Atmosphere & Ritual creation

- Popular use cases: morning refresh, sleep wind-down, reading, home office, self-care nights



Aesthetic hardware

- Minimalist, décor-friendly designs that blend into bedroom and living room setups



Convenience & Personalization

- Customizable intensity
- Automated “modes” (focus / night / cozy reading)
- Timed diffusion syncing with daily rhythms



Seamless smart home integration

- Sync with lighting, air purifiers, speakers
- App-based control and automation
- Voice activation (e.g., “start sleep mode with lavender”)



ABOUT US

OUR MISSION

Our mission is to guide businesses to holistic growth in Asia

Through market research and strategy consulting,
we equip businesses with the knowledge and guidance to achieve growth.

Growth goes beyond numbers.
Holistic growth refers to quality, resilience, impact and sustainability.

We are an extension of our clients' teams,
turning deep, local insight into actionable recommendations.



WHAT SETS DAXUE CONSULTING APART

- 1 Growth advisory for China & East Asia**, delivering market intelligence and strategic perspective.
- 2 Strategic research** powered by local intelligence and real consumer insight through a research-intensive approach.
- 3 Proven impact** through long-term client partnerships, delivering results across more than 700 projects and driving measurable growth.
- 4 Multicultural team** of 40+ members with international standards and local grounding across China and East Asia.
- 5 Trusted by clients**, scholars and recognized by top media, with 50,000+ online references.

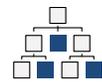


OUR CORE SERVICES

Strategic Research



- Pricing Analysis
- Product & services analysis:
- Competitive Benchmarking
- Sensory & Taste Testing
- Consumer Insight
- Market Sizing
- Trends & Foresight Reports
- Brand Audit



Sales & Distribution

- Route-to-Market Strategy (RTM)
- Distributor Selection
- Channel Strategy
- Retail Safari
- Key Account Mapping

Branding Strategy



- Naming & Nicknaming
- Messaging House Localization
- Brand Positioning
- Brand Book
- Brand Activation Toolkit
- Co-branding Strategy



Strategy Consulting

- Market Entry Strategy
- Business Planning
- Learning Expeditions
- PMO Support
- Growth Models
- Prospective & Foresight
- Product–Market Fit

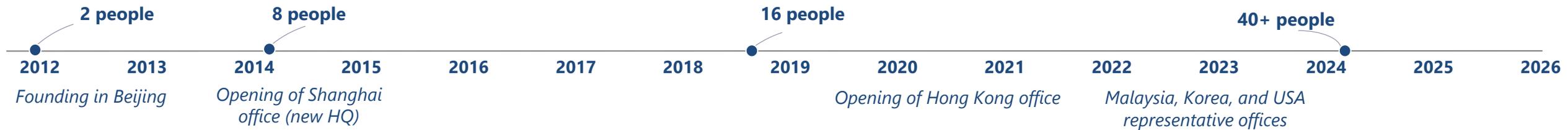


ORIGINALLY FROM CHINA, COVERING APAC

APAC COVERAGE



CHINA PRESENCE



400+ CLIENTS SINCE 2012

LVMH

COTY
SINCE 1904

PUIG

FILLMED
LABORATOIRES



KERING

Groupe
L'OCITANE

L'ORÉAL

REVLON

TEMPLESPA

REVLON

ESTÉE
LAUDER
COMPANIES

P&G

Elizabeth Arden
NEW YORK

PRADA

Atelier Cologne

SKINCEUTICALS
ADVANCED PROFESSIONAL SKINCARE

BOBBI
BROWN

Kiehl's

VALENTINO

diptyque

BIOHERM

BIOLOGIQUE
RECHERCHE
PARIS



LABORATOIRES
FILORGA
PARIS

cellcosmet
Switzerland

kimrobinson

CLARINS

HR
HELLENA RUBINSTEIN

SANDRO



A RECOGNIZED ASIA MARKET EXPERT, QUOTED IN THE MEDIA

campaign

VOGUE
BUSINESS

WWD

**South China
Morning Post**

Bloomberg

CHANNEL NEWSASIA

精睿 Jing Daily

**The
Economist**

Forbes

**WALL STREET
JOURNAL**

BOF

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News from Alibaba

REUTERS

TheJakartaPost

techradar.

**BUSINESS
INSIDER**

**THE
CHINA
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Read The Diplomat. Know the Asia-Pacific

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TechNode

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NIKKEI Asia

**The
Guardian**

**FT FINANCIAL
TIMES**

TFI

CHINA DAILY

The New York Times

FORTUNE

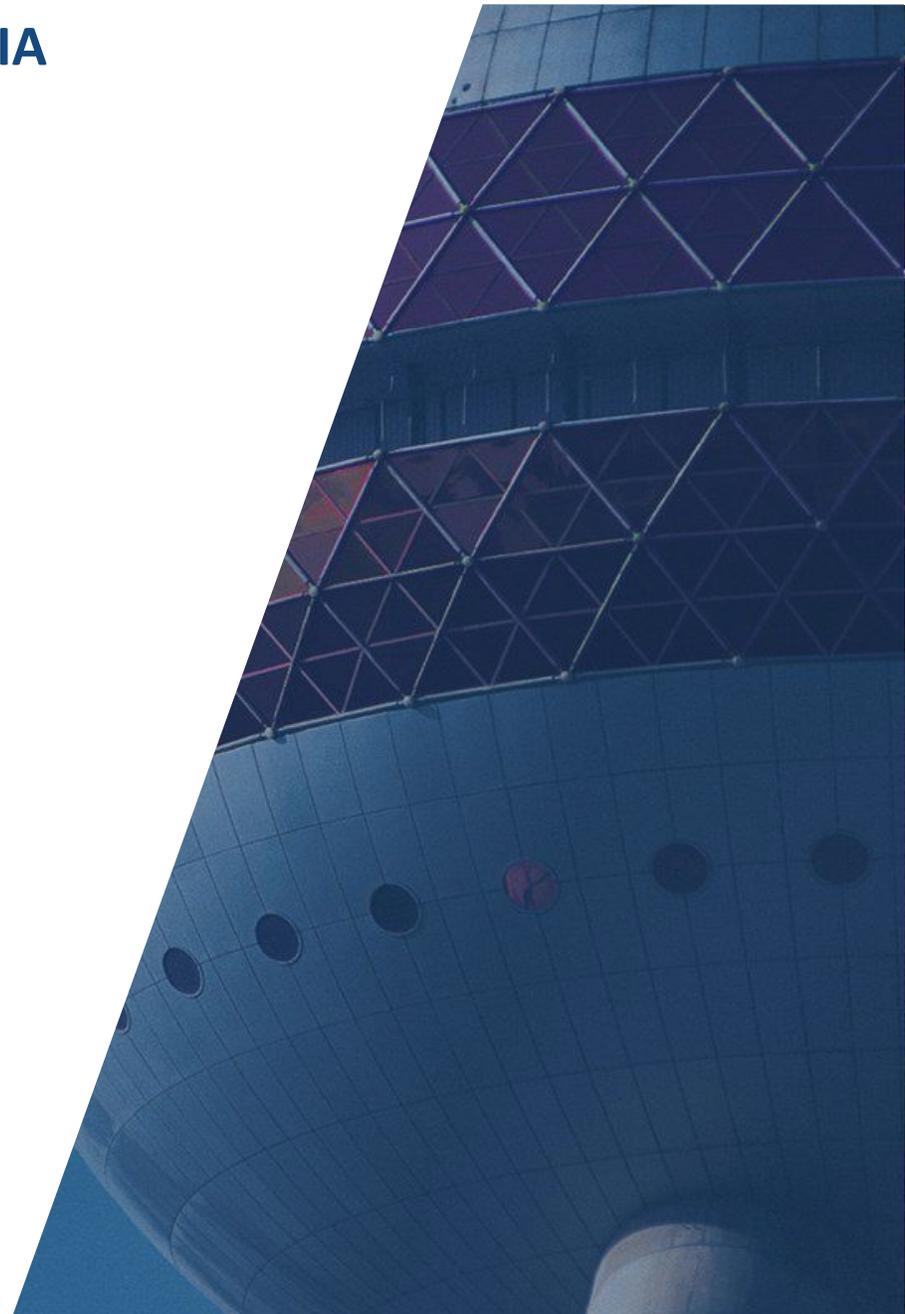
VICE

SIXTH TONE

pandaily

THE STRAITS TIMES

CNBC



WHAT BEAUTY CLIENTS SAY ABOUT US

L'ORÉAL
E-commerce Manager
@ L'Oréal

*"I come back to you to thank you and your team for the work done on the project, it was a real pleasure to work together 😊 The brand **was very satisfied with the insights, especially with the richness brought by the local Chinese specificities.**"*

Groupe L'OCCITANE
CMI Director @ L'Occitane

"Thanks a lot for this very insightful presentation. Your extra explanations Added so much to the Numbers and graphs on the slide. Well done Daxue team!"


Elizabeth Arden
VP of Innovation @
Elizabeth Arden

*"Thank you very much for your time and performance yesterday. **The team in New York and all of us appreciated a lot your presentation and the quality of the consulting from Daxue Consulting.**"*


Senior Marketing Manager
@ **American-French multinational beauty company**

"And I am so thankful that we have the Daxue team with your knowledge and insights for China market, I feel it gonna inspired us a lot for our future creation! Looking forward to work with you more on consumer behavior projects! Thanks so much!"

 **PUIG**
Manager @ Puig

"Thank you very much for your help with our colleagues' market visit, they enjoyed it very much." "We had a fantastic time in Seoul and we are happy to say that the program was a success!"



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