



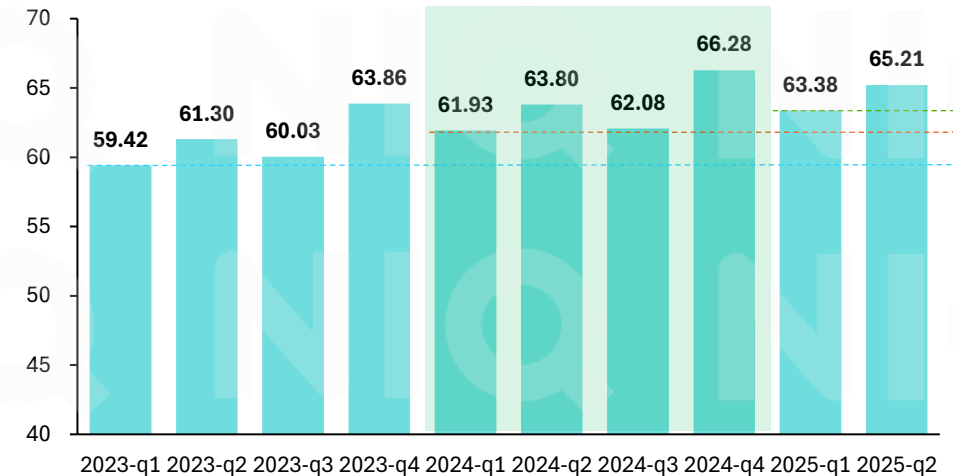
An In-depth Exploration of China's E-commerce Sales Campaign and Brand Power

——Q2 2025 China Online Consumer Brand Index (CBI) interpretation

Volume & Quality Growth- Online Festival: A Catalyst for Premium Brand Growth

The National School of Development at Peking University recently released the China Consumer Brand Index (Q2 2025). **Data shows that, driven by e-commerce mega shopping campaigns/sales campaigns (e.g., "6.18 mid-year shopping festival") and summer consumption peaks, the CBI continued its steady rise**

The online retail sales growth rate released by the National Bureau of Statistics outperformed the overall retail market. Meanwhile, according to the baseline comparison of the latest China Consumer Brand Index (CBI, the index rose from 63.38 in Q1 2025 to 65.21 in Q2 2025, reflecting a 9.7% increase from the 2023 baseline and a 2.21% year-on-year growth. This highlights Chinese consumers' strong preference for branded products during major shopping campaigns/sales campaigns.



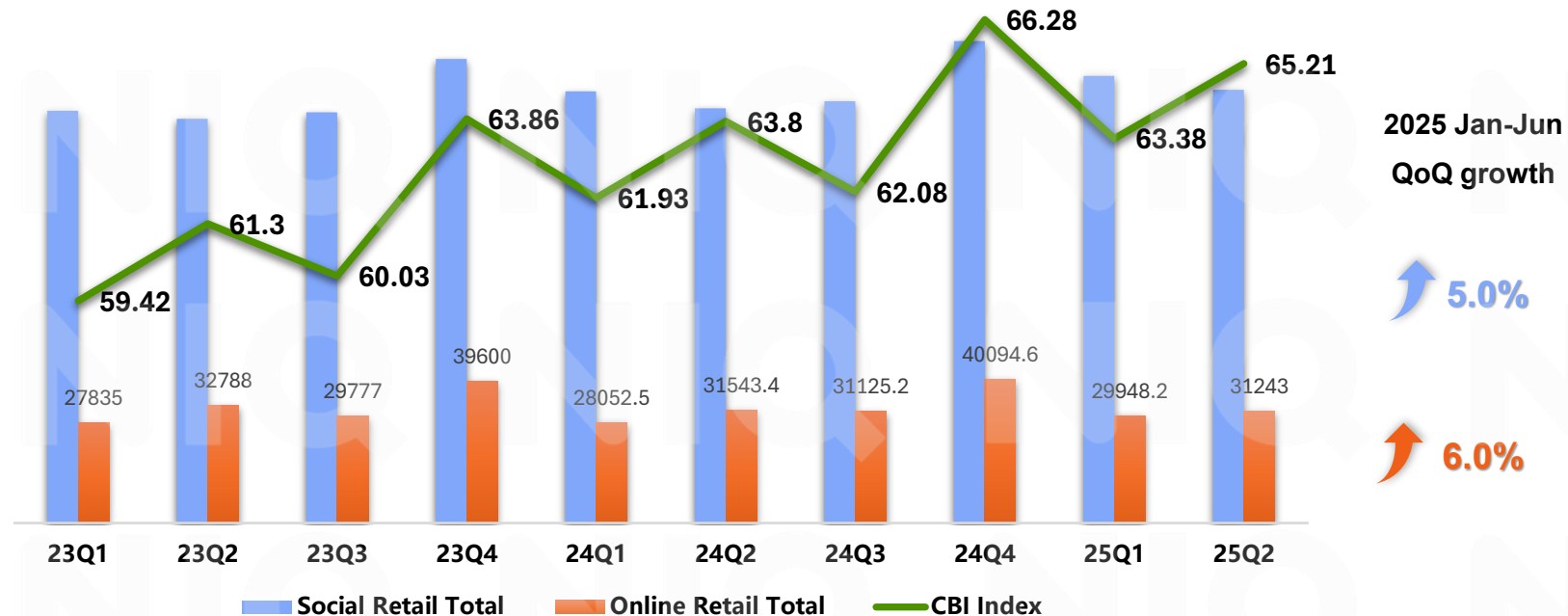
Historical data shows China's Online Consumer Brand Index (CBI) consistently peaks during Q2 and Q4 annually, coinciding with major shopping festivals like 6.18 mid-year shopping festival and Double 11. **Consumers not only spend more but prefer premium brands over generic products. Success in China now hinges on leveraging these e-commerce mega shopping campaigns/sales campaigns.**

Volume & Quality Growth- Online Festival: A Catalyst for Premium Brand Growth

E-Commerce Campaign: A Catalyst for Premium Brand Growth

CBI data from the past 10 quarters shows that China's retail sector achieves quality upgrades during major e-commerce shopping campaigns/sales campaigns (see chart below). Consumers now have stable expectations for these shopping festivals, allowing brands to boost sales through discounts while maintaining perceived product quality and brand image.

Quarterly breakdown of total social retail sales, online sales and brand index changes for H1 2023-2025



2025 E-Commerce Shopping Campaigns Rule Changes Unleash Consumption Momentum, Driving Significant GMV Growth with Summer Categories Particularly Prominent in Q2

Extended shopping campaigns/sales campaigns Periods with Intensified Competition

Online Sales Campaign

Period increase



Jun 18 2025 Campaign

+15Days

17Days → 32Days

+8Days

21Days → 29Days



Single-day (June 18) postal parcel collection volume during 6.18 mid-year shopping festival

420 Mn+

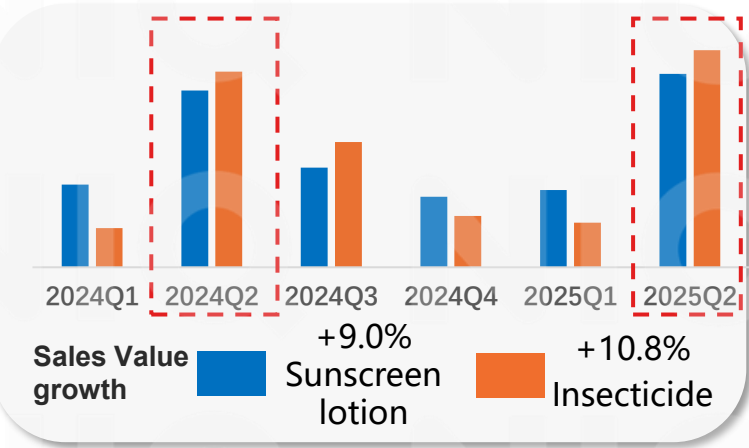
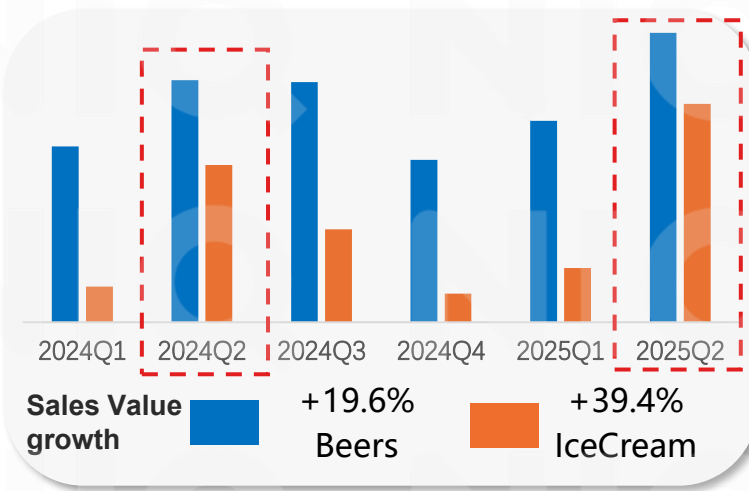
National average daily express delivery volume throughout the 6.18 mid-year shopping festival campaign period

5.5 Mn+

Platform Rule Updates: Simplifying Shopping



Category Performance



The FMCG sector saw further enhanced online-led growth, with strong e-category expansion driving overall market performance

China Omnichannel Perspective

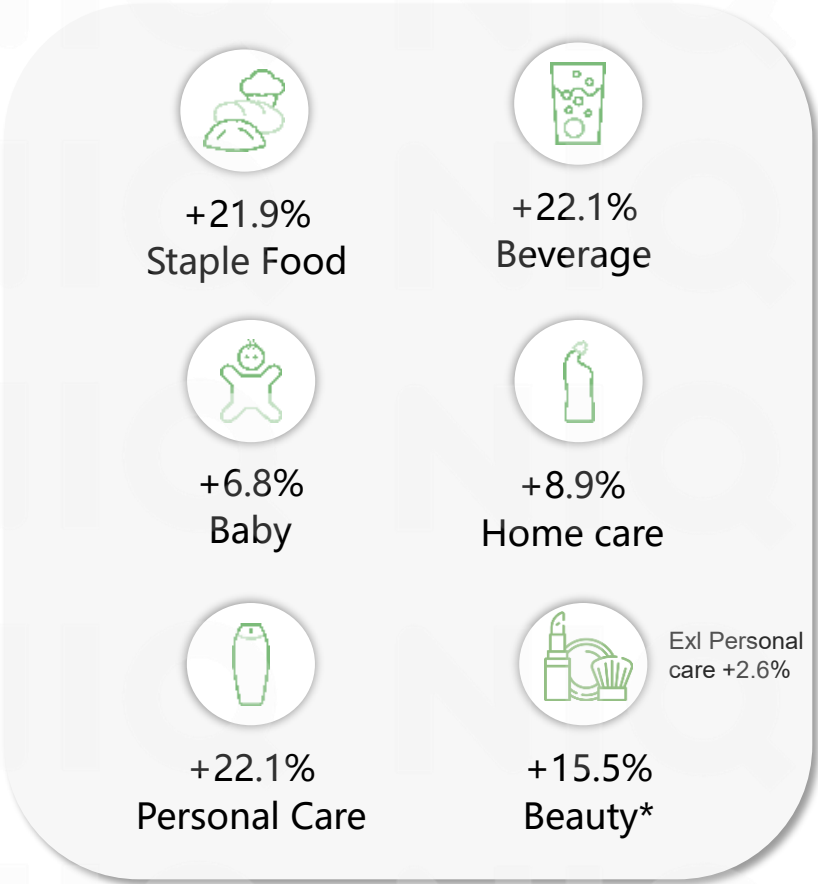
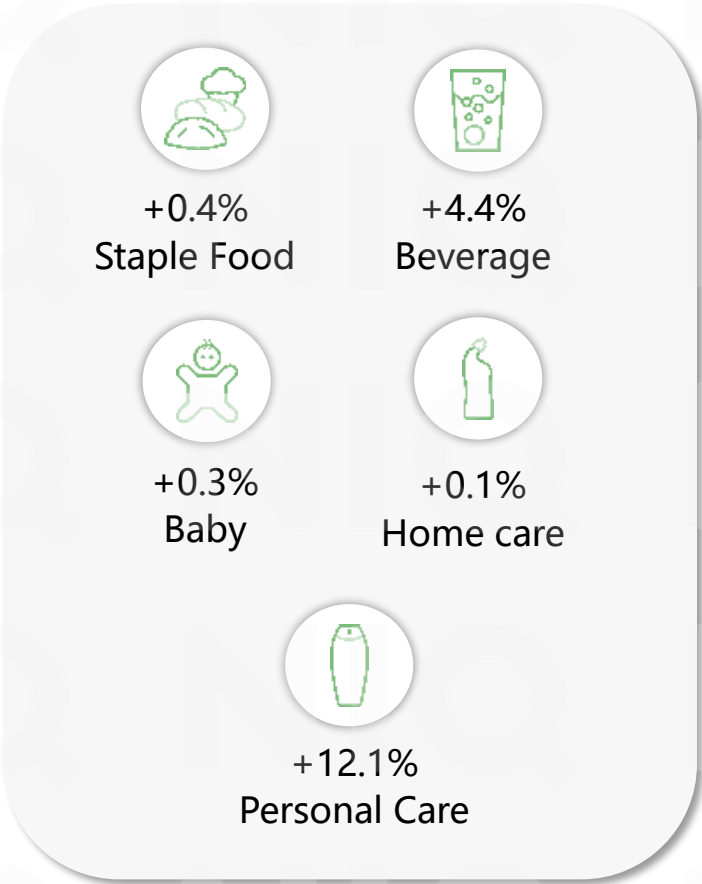
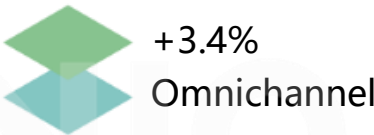
+3.4%

Q2 2025 China FMCG Industry
Year-over-Year Growth Rates

■ Offline: -4.1%
■ Online: +16.2%

Q2 2024: 1.8%

Q2 2025 YoY
Growth



Category Specialization Drives Core Consumer Value – Innovative Concepts Precisely Address Pain Points, Elevating the Entire Segment

Beauty& Skin care

70,760 Million

Top 3 Categories by YoY Online Sales Growth in Q2

Skin Care	Eye Makeup	Perfume
47,320Mn +23.2%	2,310Mn +10.8%	3,080Mn +9.5%



Skin-Care-Makeup Hybrid



Reparative
Cleansing Balm



Double Anti-
Foundation



Truffle-Infused
Serum Foundation

Personal Care

40,090 Million

Toothpaste	Soap/Shower Gel	Shampoo
4,360Mn +36.8%	4,710Mn +29.5%	5,630Mn +28.0%



Precision Minimalism



Thermal Spring Spa
Shampoo



Instant-Dissolving Scalp
Scrub



Dry Shampoo
Spray

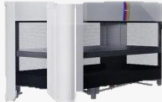
Baby

18,230 Million

Infant Cereals & Grains	Diapers	Goat Milk Formula
280Mn +12.3%	7,430Mn +10.8%	470Mn +6.0%



"Niche Market Expansion"



Convertible baby
crib



Kids' sunblock



Camellia oil baby cream

Homecare

10,850 Million

Household Cleaners	Disinfectants/Laundry Pre-wash Products	Dishwashing Liquid
1,790Mn +29.0%	1,230Mn +24.2%	760Mn +18.3%



All-in-One Smart Solutions



Multi-purpose
cleaning emulsion



Sticky residue cleaner



Natural stain-
removal powder

Emerging FMCG Brands Focus on Efficacy & Self-Care Across Four Major Categories, Forging Distinct Competitive Paths

Local Brands Gain Strong Momentum

- Domestic brands dominate the Top 50 rankings, claiming 48 spots
- Homegrown disruptors deepen consumer mindshare through education
- Chinese manufacturers accelerate branding efforts to meet rising demand for labeled consumption

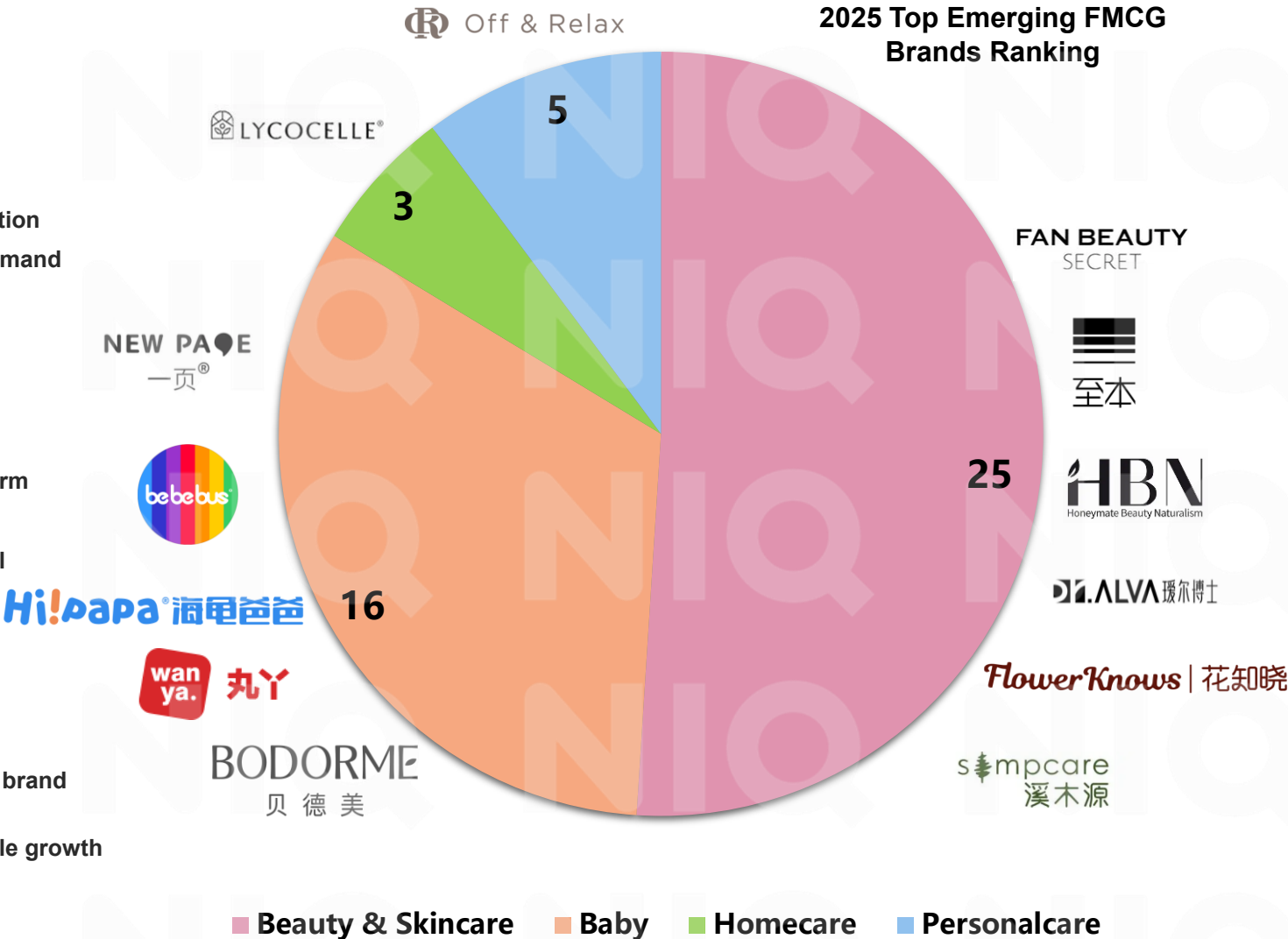
Category-Wide Branding Trends Intensify

- Beauty & Skincare: High brand saturation, with branding now the norm
- Home & Personal Care: Premiumization elevates quality perception
- Mother & Baby: Niche positioning fuels competition in high-potential segments

Precision Audience Targeting Drives Growth

- Laser-focused on high-net-worth consumers, building differentiated brand equity
- Optimized customer experience & product functionality sustain stable growth
- Personalized services boost retention & conversion among core demographics

2025 Top Emerging FMCG Brands Ranking



Elevated experiences and immersive scenarios are key to engaging high-value consumers, making them critical to brand success

 Off & Relax

FAN BEAUTY
SECRET

Personal Care – Thermal Spa-Grade Hair Care Set

Audience Profile: Women prioritizing haircare & premium repair concepts.

ROI: 65% YoY sales growth in Q2, 300K+ units sold, cumulative 2025 revenue exceeding ¥60M.

Mother & Baby – Hypoallergenic Skincare for Infants

Audience Profile: Millennial moms (born 1990–1995) focused on scientific parenting.

ROI: 65% YoY Q2 growth, 10+ SKUs surpassing ¥1M sales during 6.18 mid-year shopping festival shopping festival.

01

02

03

04

Beauty – Bio-Tech Hydrating Mask

Audience Profile: Ingredient-conscious consumers embracing innovative formulations.

ROI: 77% MoM sales surge in June, with average unit price 21% above category benchmark; ¥60M+ revenue in May–June.

Home Care – Perfume-Inspired Laundry Detergent

Audience Profile: Consumers seeking luxury scent experiences and "self-care" home rituals.

ROI: 145% YoY Q2 growth, with unit price & volume 10x category average.

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Strategic Audience Layering & High-ROI Brand Funnel

Core Circle



- **Deeply understand** latent needs, pain points, and unique subculture codes.
- **Communicate** through value anchors aligned with this group (e.g., tech, wellness, emotional resonance, social currency, expertise, efficiency).

Transition Circle



- **Build trust** via vertical KOLs, long-form content, UGC case studies, and community engagement.
- **Funnel optimization:**
Awareness (seeding) → Conversion (campaigns) → Private traffic retention → Service/content binding → Repeat purchases → Viral advocacy

Peripheral Circle



- **Precision targeting** using platform tools, with real-time ROI tracking across touchpoints.
- **Omni-scenario penetration:** Address contextual pain points and psychological triggers through multi-angle content.

