

Cosmetics online market 2021

Public version of the study

 **Data Insight** with the support of *ROWI* | **sellplus**



Methodology



with the support of

ROWI

sellplus

1. The present study investigates the segment of online stores of cosmetics. The report includes stores that specialize in selling makeup and skincare, perfumes, products for manicure, pedicure and make-up artists.
2. Online store – website of application that allows to place an order by filling up a form or adding products to the cart. The report analyzes online sales of Russian retailers on the territory of Russia (excluding export sales). The study includes both cosmetics online stores and the biggest one-stop market-places (with annual online sales of at least 300 billion rubles); for the latter only sales in cosmetics category are included.
3. For network marketing companies, online sales are considered only through the basic interface, available including for new buyers. If a company has different interfaces for retail customers and representatives, sales through the second interface are not considered.

Methodology



with the support of

ROWI | **sellplus**

4. Sector statistics are provided for 54 stores, including 48 cosmetics online stores in the top 1000 largest Russian online stores by the number of online orders, 4 online stores of network marketing companies, as well as 2 largest universal marketplaces - Wildberries.ru and Ozon.ru . To calculate the number of orders, the results of regular monitoring of the number of online orders are used, as well as data provided by stores or open-source data.

5. When determining the third-party services used by online stores, the method of automatic parsing was used, after which additional manual analysis was carried out in disputable cases. The list of marketing services includes the main solutions for each online store from the TOP-10.

Conclusions

In total, 231 million online orders worth 211 billion rubles were placed in the cosmetics segment in 2021.

In 2021, the cosmetics segment grew by 43% in terms of money and by 86% in terms of orders. In terms of revenue growth, the segment ranks tenth out of twelve in the Russian eCommerce market, and seventh in terms of growth in the number of orders. Excluding universal marketplaces, the growth of the cosmetics segment was 10% in terms of money and 7% in the number of orders.

Compared to 2020, the average check in the cosmetics segment decreased by 23% due to an increase in the share of marketplaces and in 2021 amounted to 915 rubles, which makes it the lowest average check in the eCommerce market. Excluding universal marketplaces, the average check in 2021 equals 3,050 rubles, which is 3% more than in the previous year.

The cosmetics market accounts for 13% of the Russian eCommerce market in terms of online orders and only 5% of total sales.

The sector conversion amounts to 5%. The closest figures are for children's goods stores - 5.6% and clothing, footwear and accessories stores - 4.5%.

Conclusions

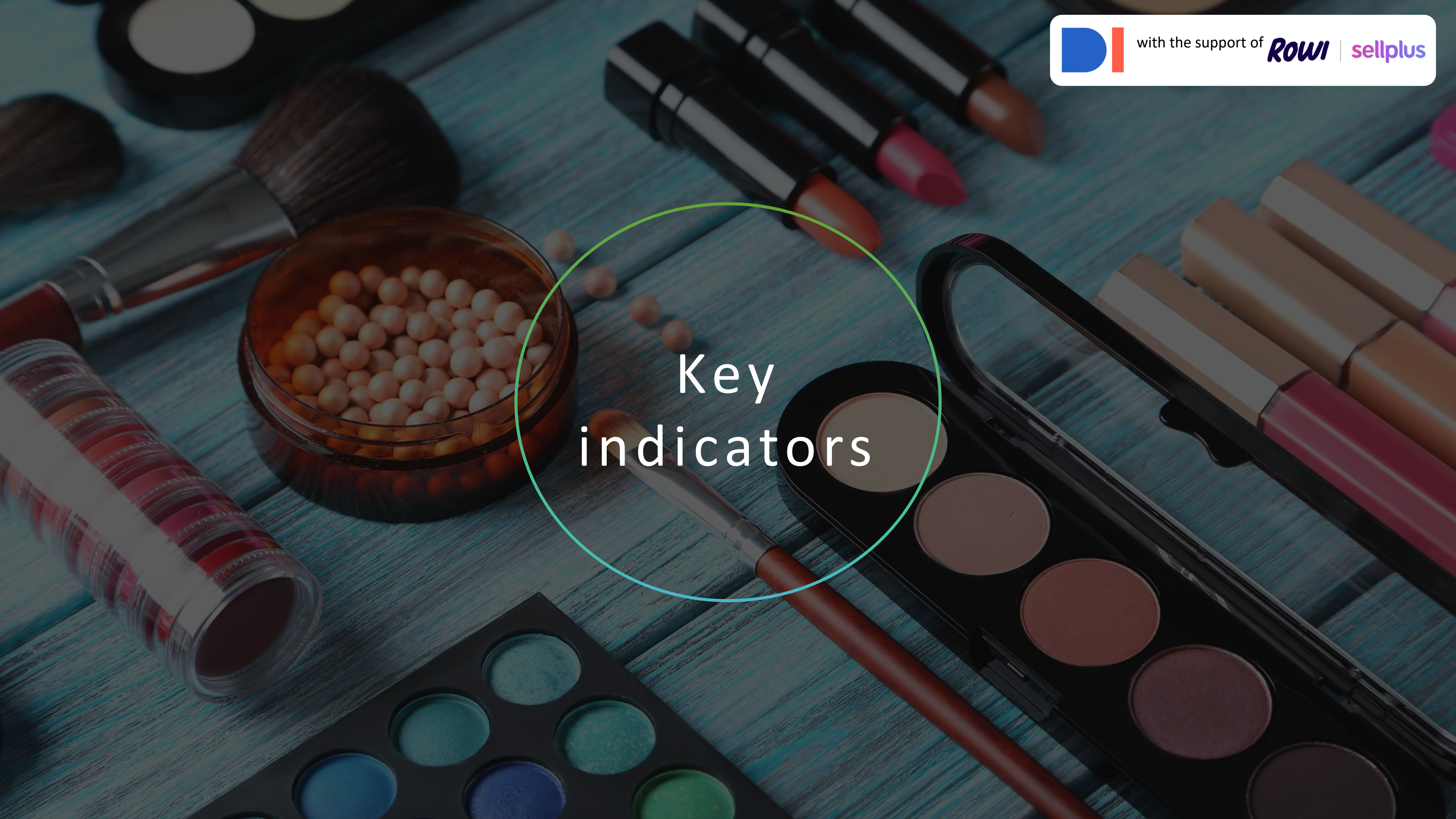
Half (54%) of online sales and 86% of cosmetics orders account for two one-stop stores. The largest category (35% of all stores included in the study) - general stores - accounted for 24% of all online sales and only 6% of the segment's orders. Another 7% of stores are network marketing stores, accounting for 14% of online sales and 6% of orders. The second largest category (28%) - skin care stores - accounts for only 3% of online sales.

The first place (by sales volume) in the cosmetics segment in 2021 was taken by Wildberries.ru. The second and third are Ozon.ru and Faberlic.com.

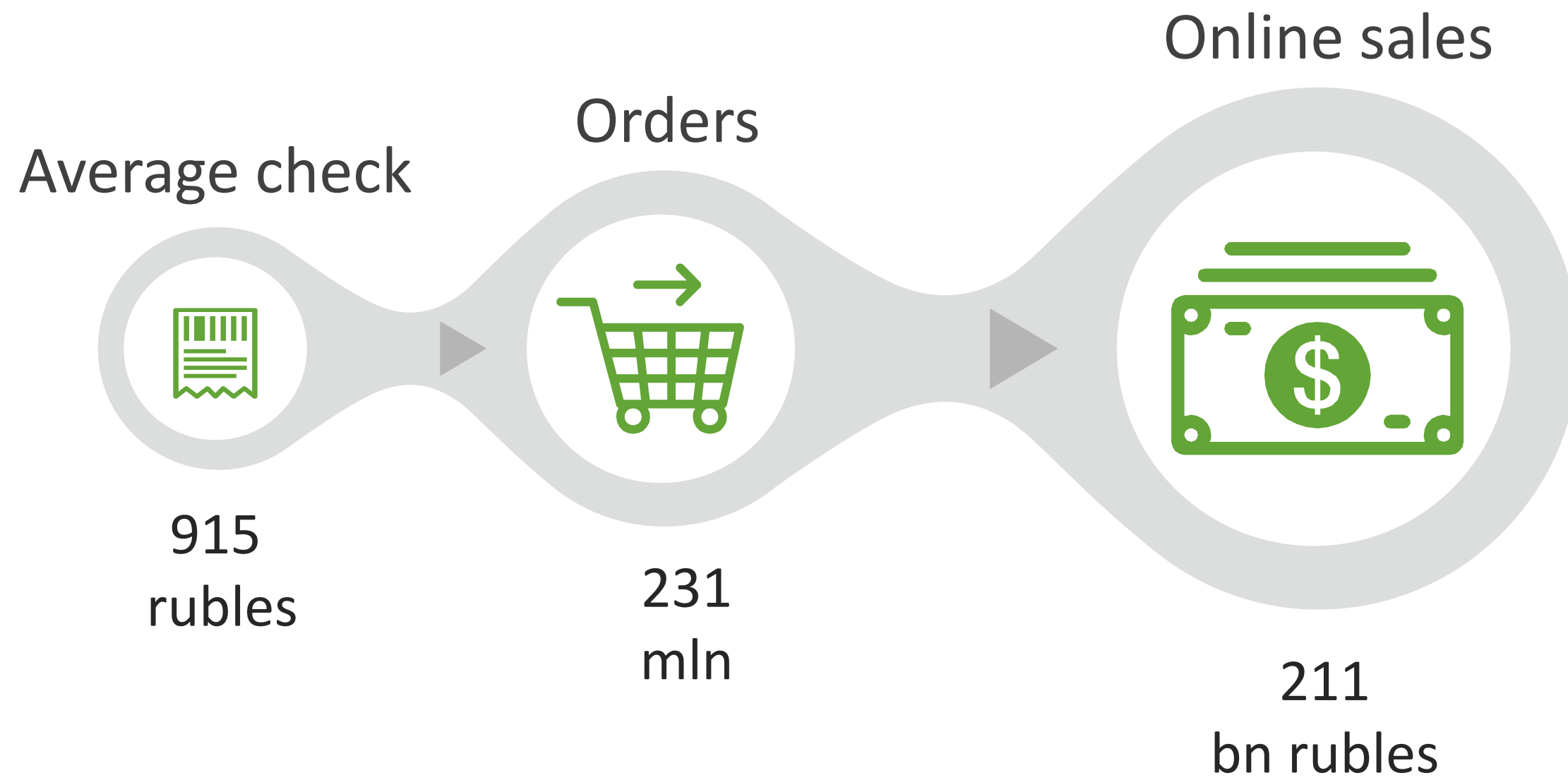
72% of the stores considered in the study are registered in Moscow or the Moscow region. Compared to 2020, the share of stores registered in the Asian part of Russia decreased by 5%.

The structure of traffic sources in the segment of online cosmetics stores is characterized by an increased share of direct traffic (33% vs. 27% on average) and a reduced share of organic search (40% vs. 43% on average in the eCommerce market). In the structure of traffic sources in the cosmetics segment, the share of direct traffic increased by 7% over the year.

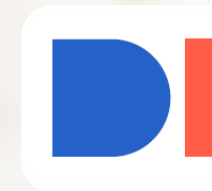
Key indicators



The volume of the online cosmetics market



In 2021, **231 million orders** worth **211 billion rubles** were placed in in the TOP-1000 cosmetics online stores. The average check was **915 rubles**.

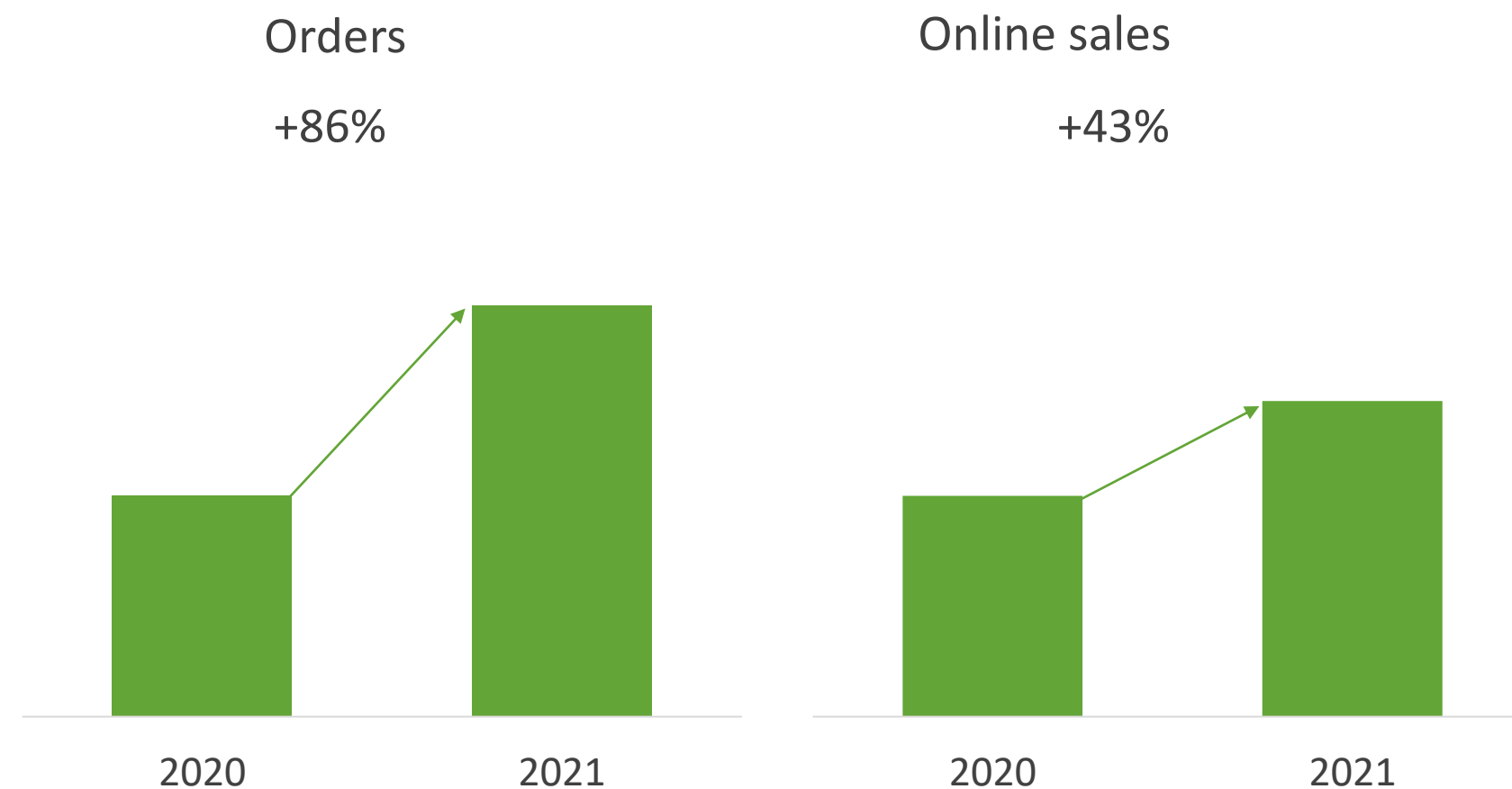


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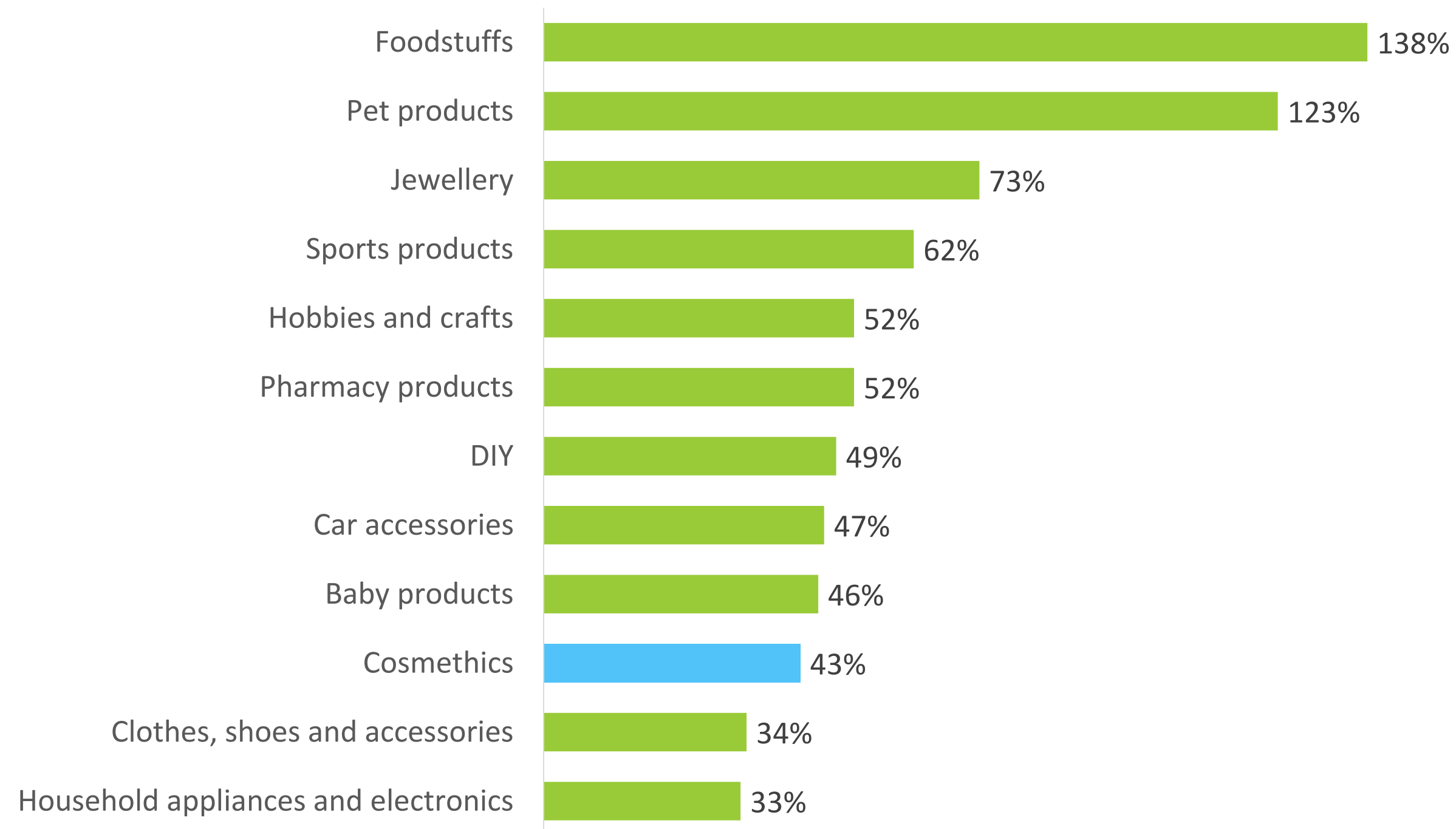
Market Dynamics

The number of online orders in online cosmetics stores in 2021 increased by **86%**. The volume of online sales for the same period increased in rubles by **43%**. The average check decreased by **23%**.



Growth of online sales of the segment vs. other categories

Growth in online sales relative to other segments of the eCommerce market, y-o-y*

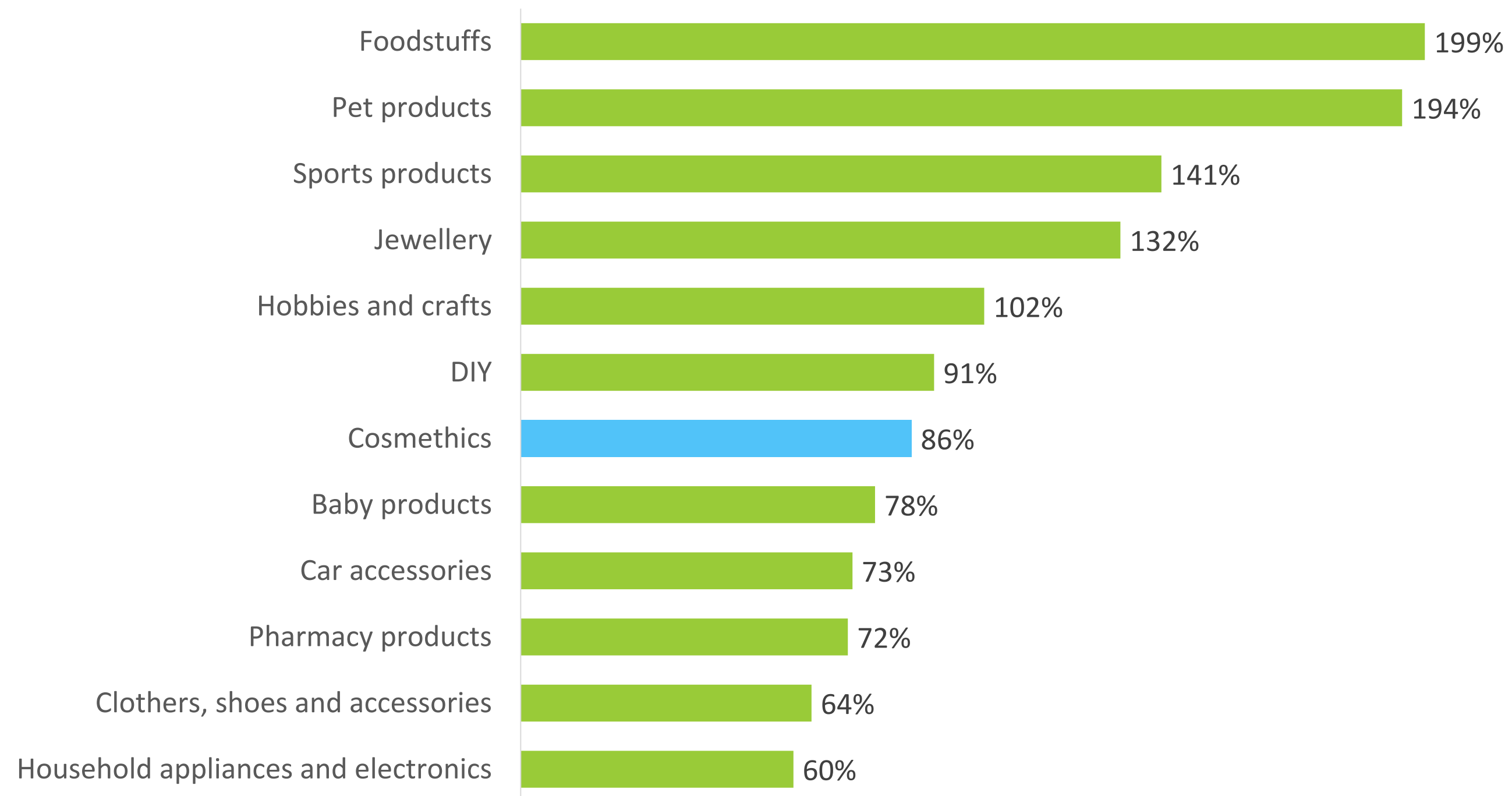


* y-o-y – year-over-year.

Data for year 2021 including the sales of on—stop marketplaces.

Segment orders growth vs. other categories

Growth in orders relative to other segments of the eCommerce market, y-o-y*

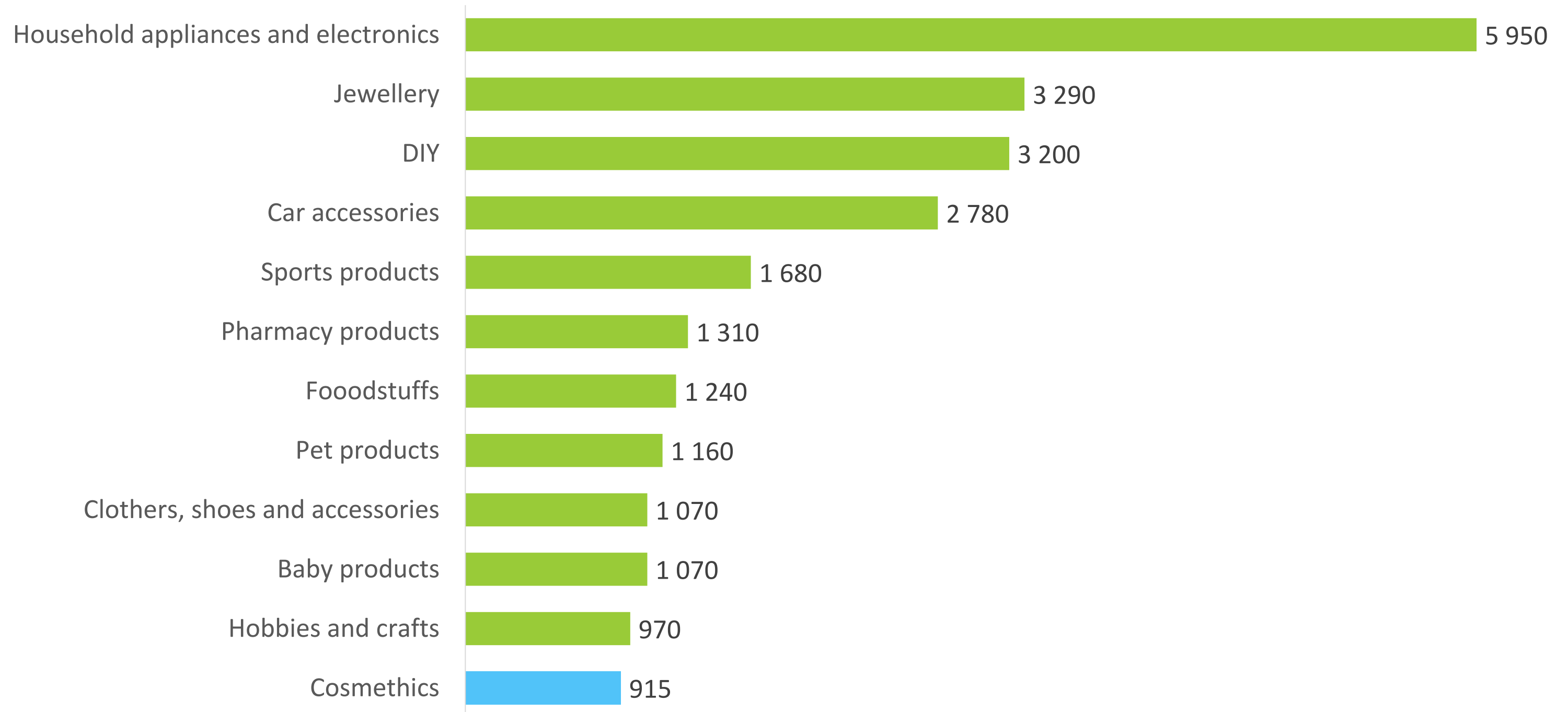


* y-o-y – year-over-year.

Data for year 2021 including the sales of on—stop marketplaces.

Segment average check vs. other categories

Average check relative to other eCommerce market segments, y-o-y*



* y-o-y – year-over-year.

Data for year 2021 including the sales of on—stop marketplaces

Share of online cosmetics stores in the eCommerce market

By the number of orders



By the online sales volume

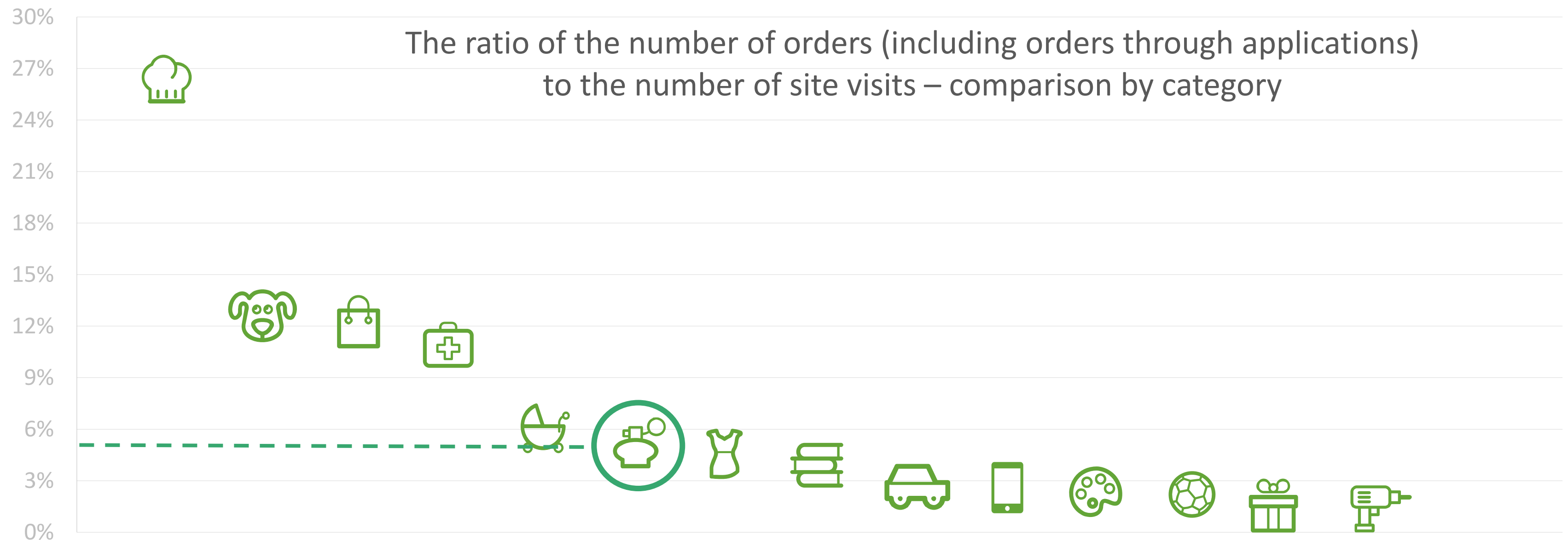


In 2021, online cosmetics stores accounted for **13%** of the Russian eCommerce market* by the number of online orders and **5%** by online sales in rubles.

* Considering the 1000 largest Russian online stores by online sales in 2021.

Online stores conversion

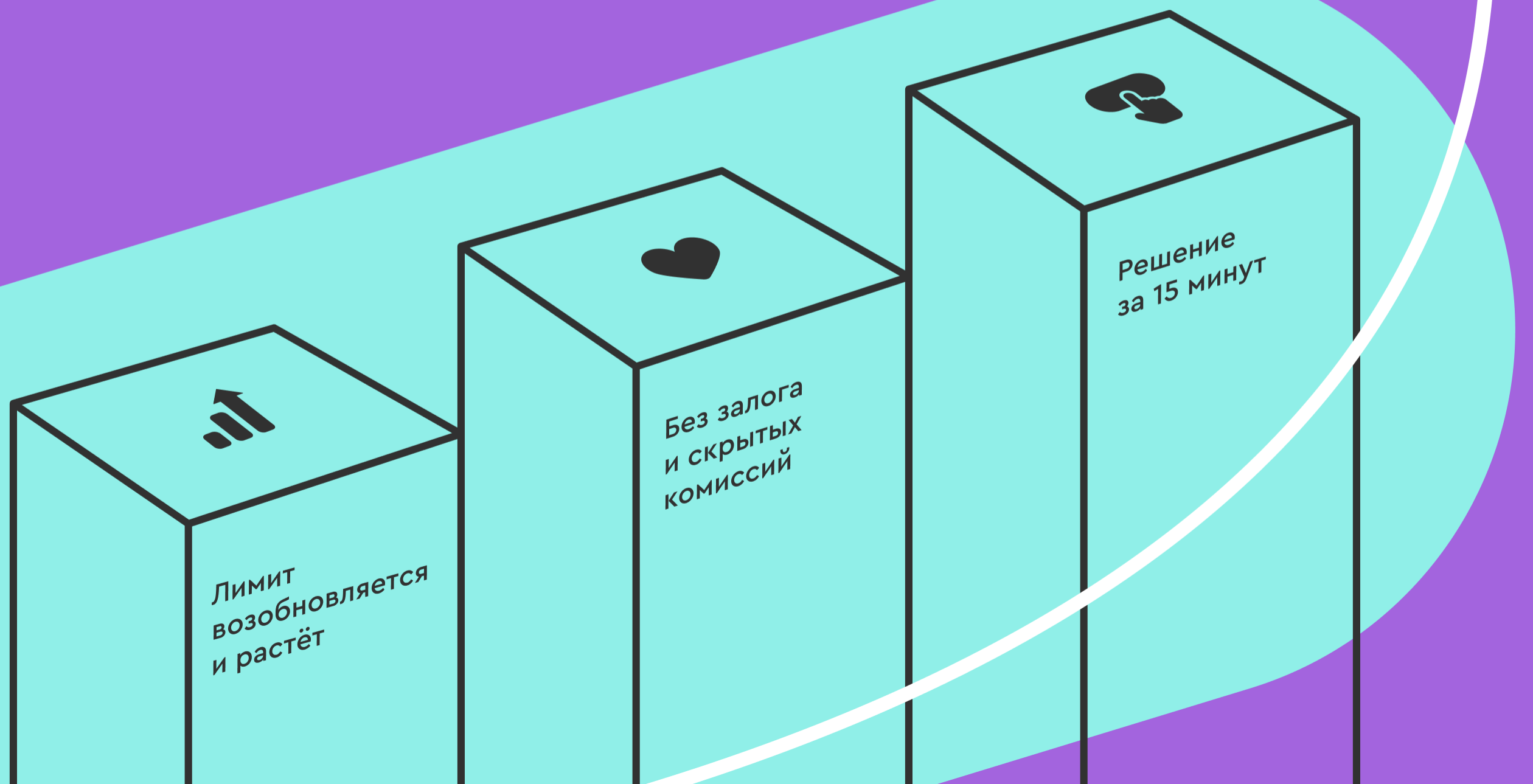
In the segment of online cosmetics stores, the conversion for 2021 was 5% (5 orders per 100 site visits). The closest figures are for children's goods stores - 5.6% and clothing, footwear and accessories stores - 4.5%.



The conversion for the cosmetics segment is given without one-stop stores and marketplaces.

Финансирование бизнеса на маркетплейсах

Для селлеров косметики
Wildberries, Ozon и Яндекс.Маркет



sellplus

Клиенты Sellplus
растут в 3 раза
быстрее

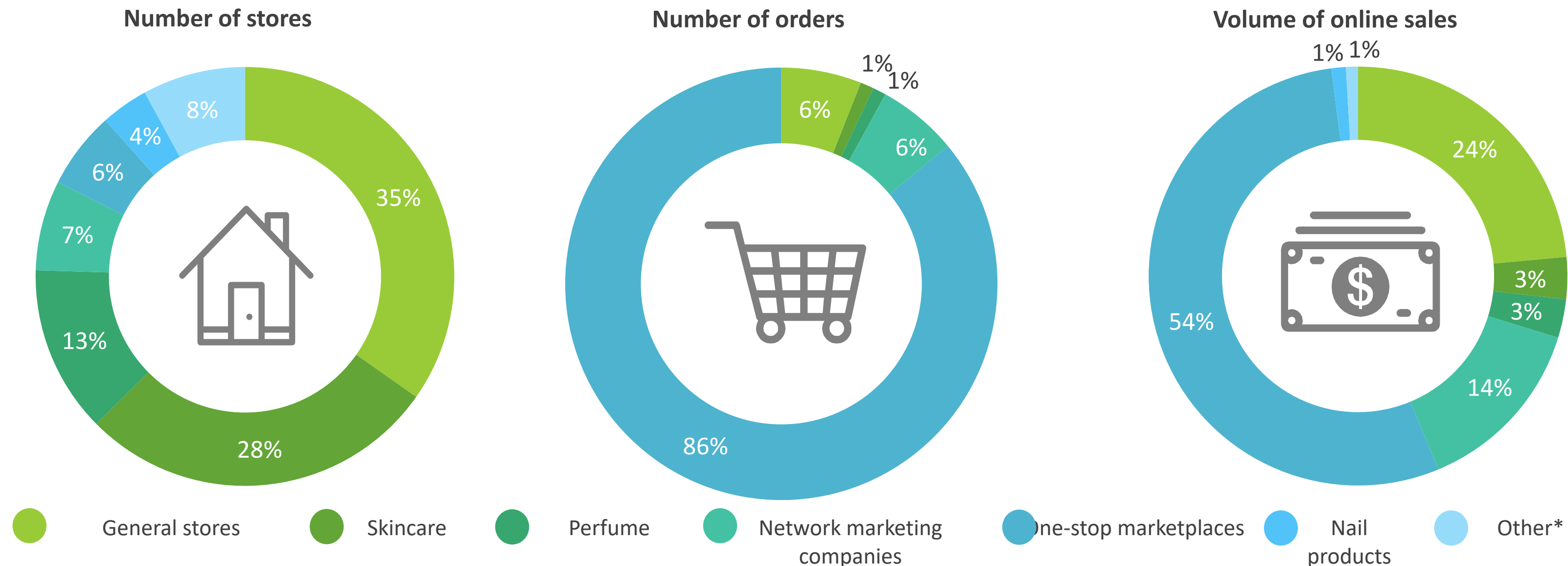
Подробнее на sellplus.ru



Segment
composition

Segment structure

The TOP-1000 Russian online retailers included 54 online cosmetics stores, of which a little more than a third (35%) are general stores. They account for 6% of the total number of orders and 24% of online sales - but even more (14 times in orders and 2.3 times in monetary terms) the total share of the two considered universal marketplaces. A significant share of both the number of orders (6%) and the volume of online sales (14%) are accounted for by four network marketing companies.



* "Other" includes on all graphs (in descending order) - makeup, hair products stores.

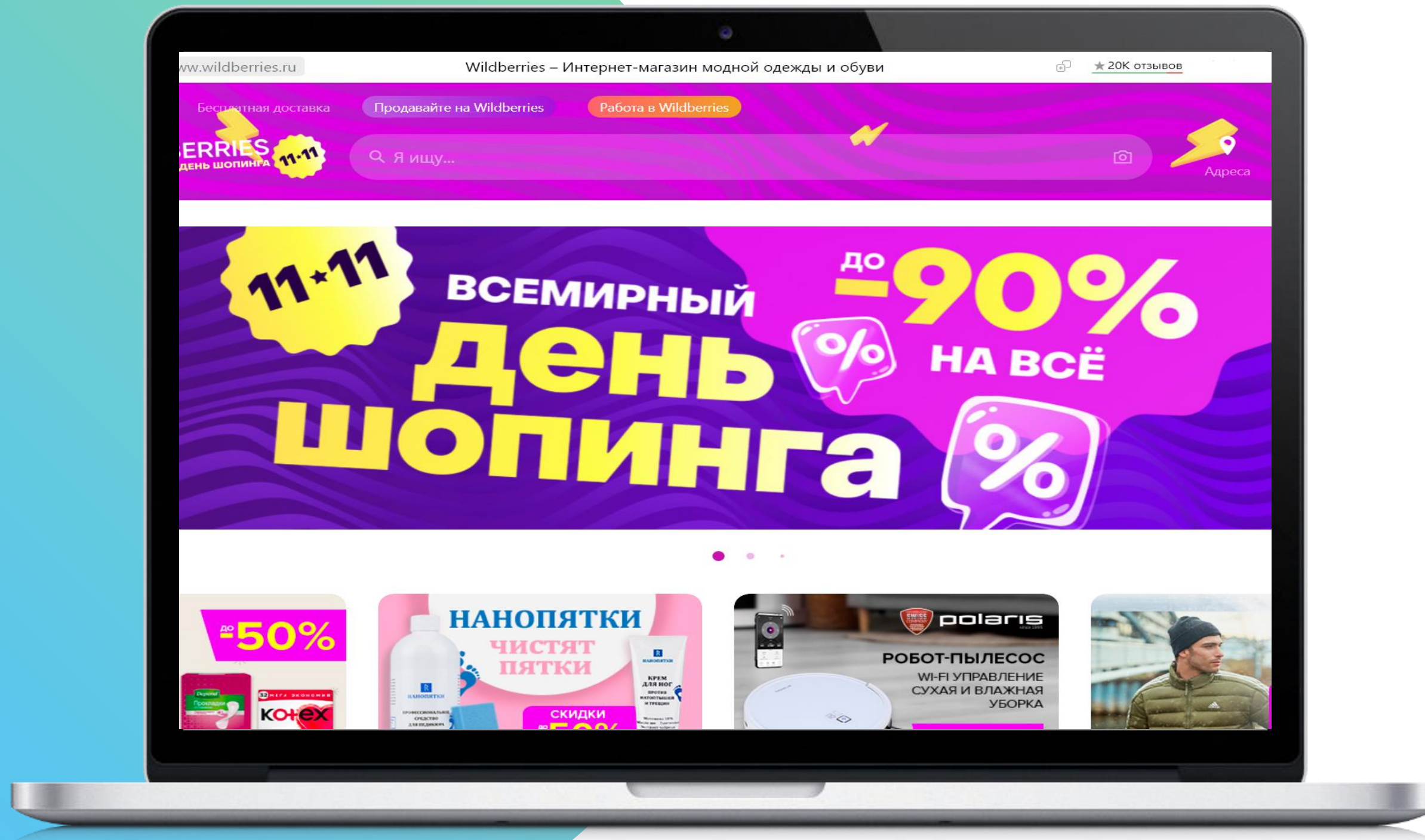
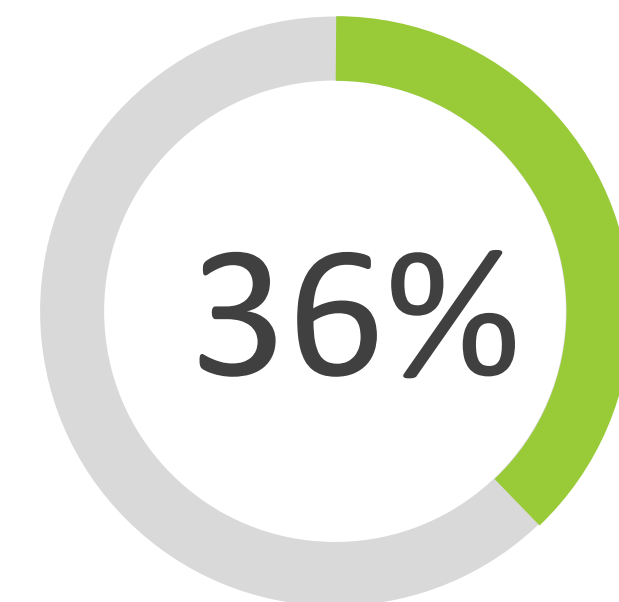


при поддержке

ROWI | **sellplus**

Leader of the category Wildberries.ru

The share of Wildberries.ru in terms of online sales among online cosmetics stores* for 2021:



* Taking into account only online stores included in the TOP-1000 of the Russian eCommerce market by the number of orders, and not including the "long tail".


TOP-10 market players *

1. **WILDBERRIES** Wildberries.ru

2. **OZON** 24/7 РАБОТАЕМ ВСЕГДА Ozon.ru

3. **FABERLIC** Faberlic.com

Other online stores in the TOP-10 (in alphabetical order):

 **Золотое Яблоко**
Парфюмерный супермаркет

 **Этуаль**

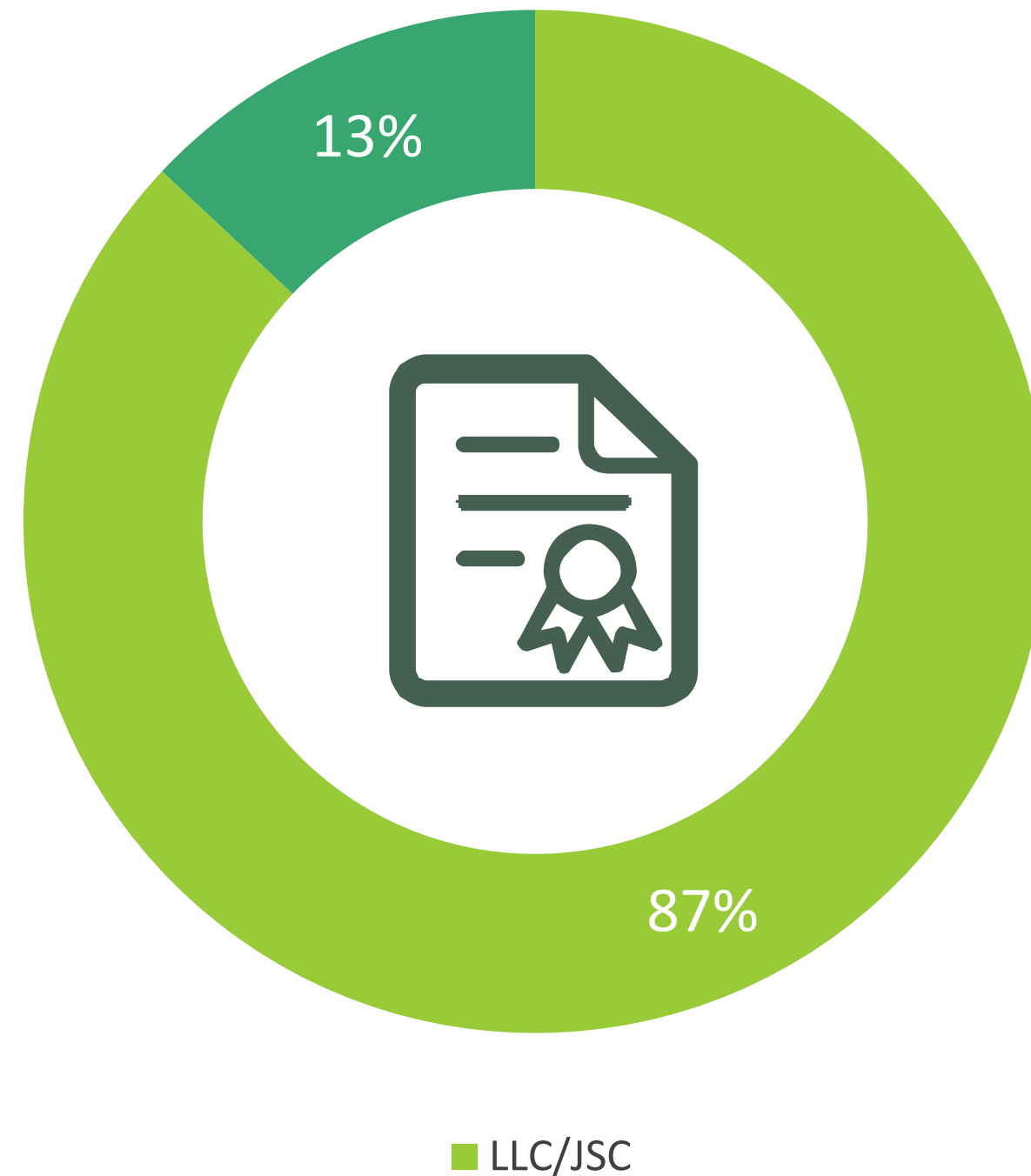
 **ORIFLAME**
S W E D E N

 **RANDEWOOD** RU

РИВ ГОШ

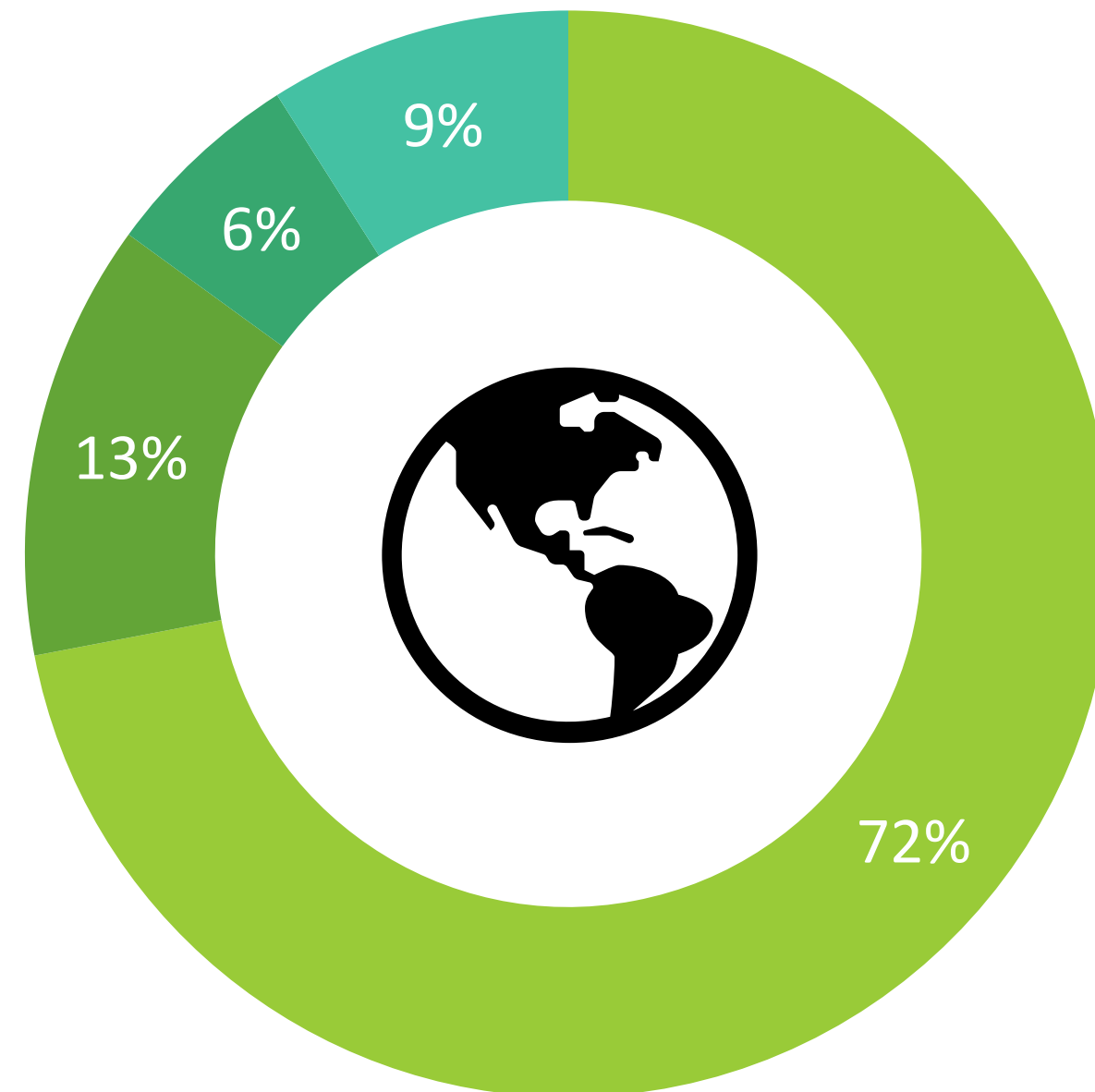
 **YVES ROCHER**

 **ДУХИ.РФ**
интернет-магазин



Legal entity type

Of the 54 online cosmetics stores included in the TOP-1000 online retailers, 87% are companies (private limited company, joint-stock company). Only 13% are individual entrepreneurs. This is drastically different from 2020, when individual entrepreneurs accounted for twice as many stores (31% of all those included in the study).



- Moscow and Moscow Oblast'
- St. Petersburg and Leningrad Oblast'
- Ural and Asian part of Russia
- European part of Russia

Geography of online stores*

Of the 54 online cosmetics stores included in the TOP-1000 online retailers, only 15% of stores are located in non-capital regions of Russia: 6% in the Urals and the Asian part and 9% in the European part.

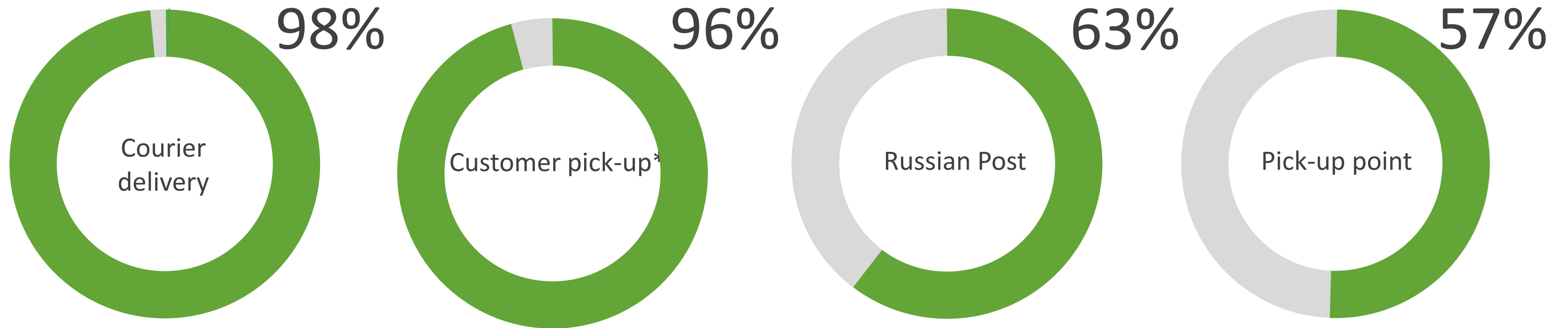
* Based on data on the place of registration of online stores.

Delivery



Delivery methods

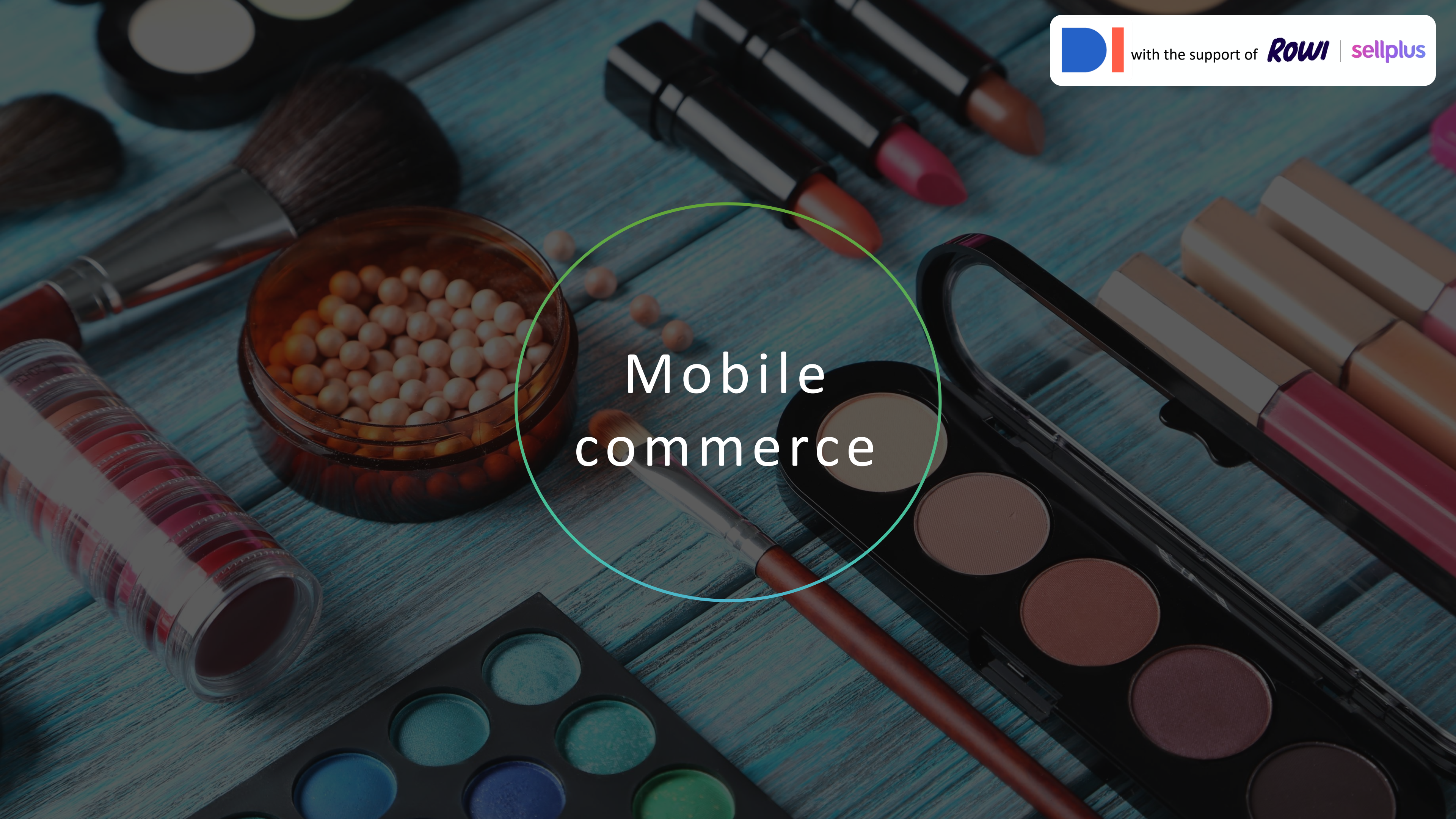
Share of online stores that use different delivery methods



All four delivery methods are used by 41% of online cosmetics stores.

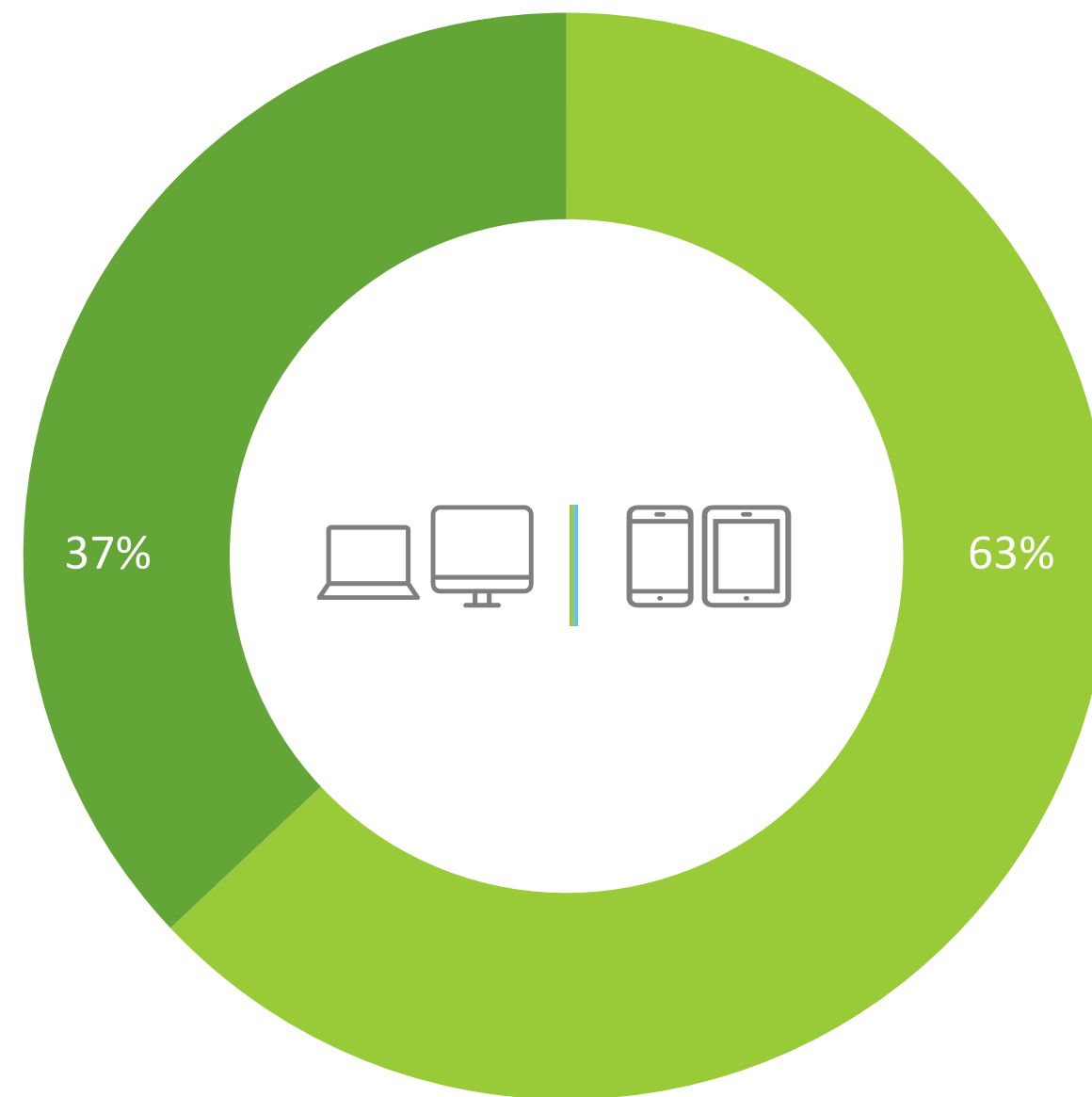
* Customer pick-up – pick-up from all non-automated (with employees) pick-up points, including company's stores.

Mobile commerce





Desktop vs Mobile



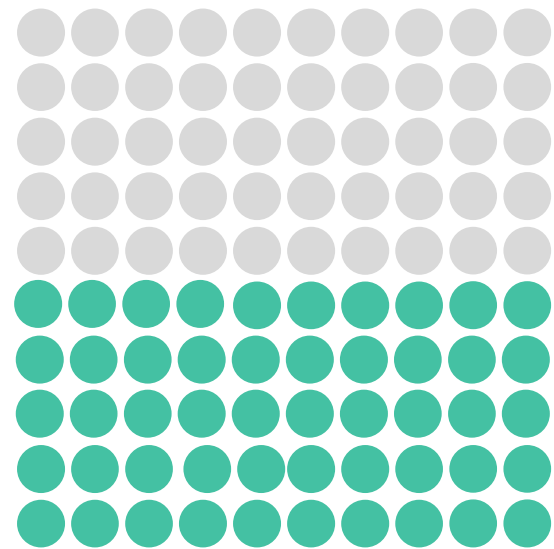
To visit the sites of online cosmetics stores, buyers use mobile devices more often than desktop ones.

According to SimilarWeb; the average figures for 54 online stores are given, excluding the "weight" of the store in the total traffic of the segment.

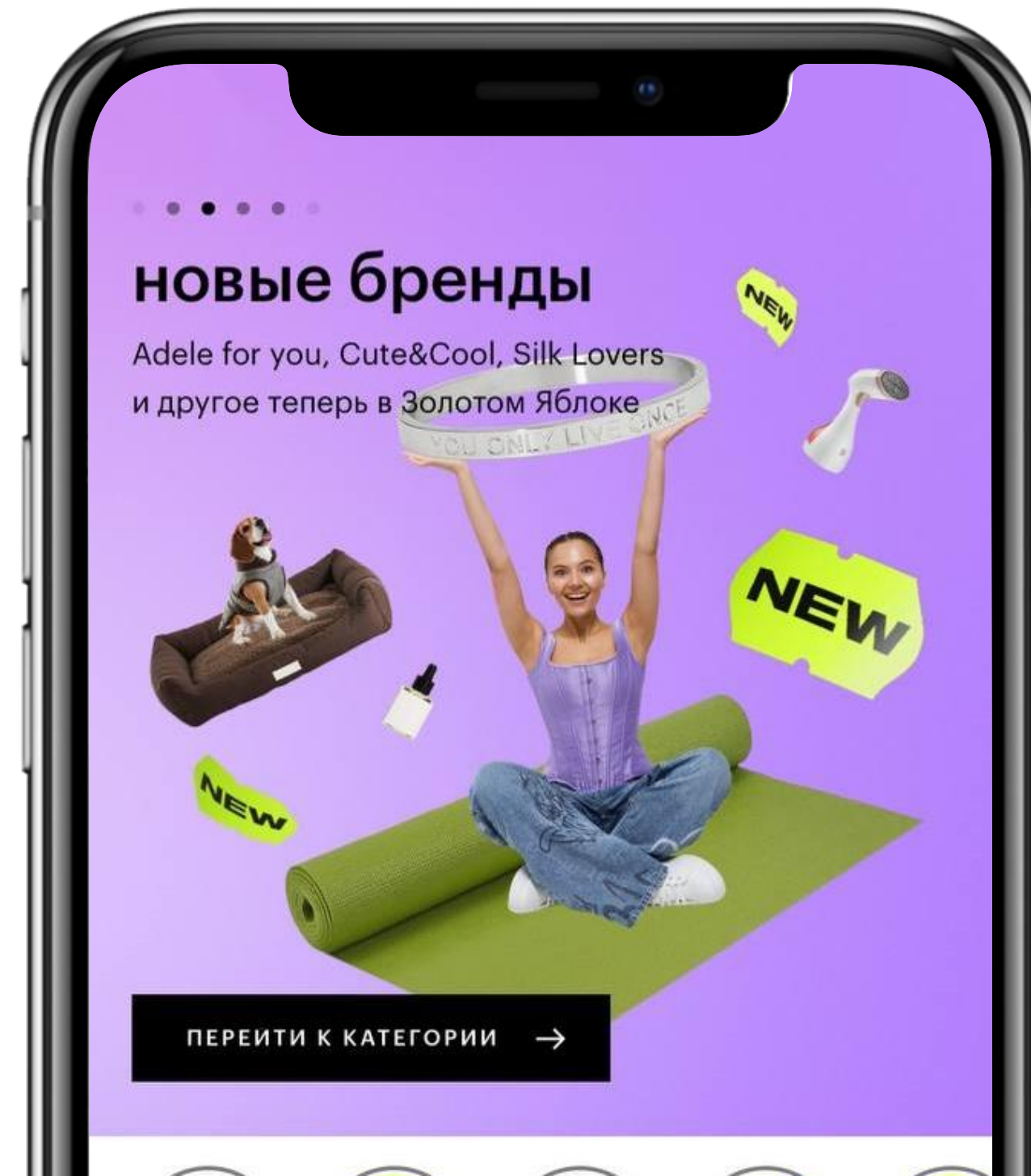
Mobile apps

Goldapple.ru has the most popular app - over 5 million installs and 50,000 reviews on Google Play.*

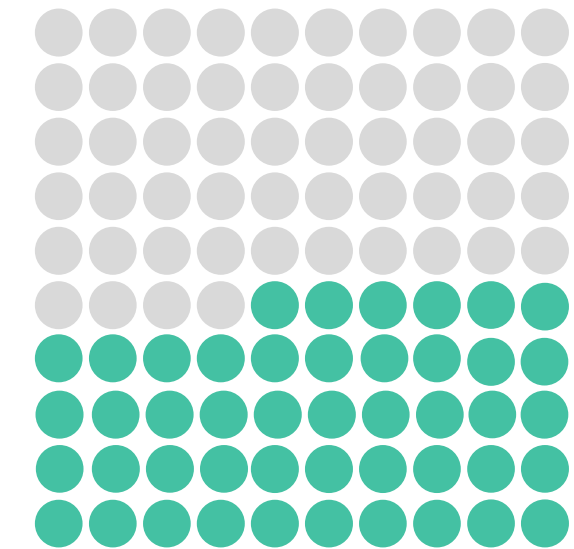
50%




Share of online cosmetics stores with apps on **Google Play**



46%



Share of online cosmetics stores with applications on **App Store**

Goldapple.ru app (screenshot of the app with the largest number of reviews). 

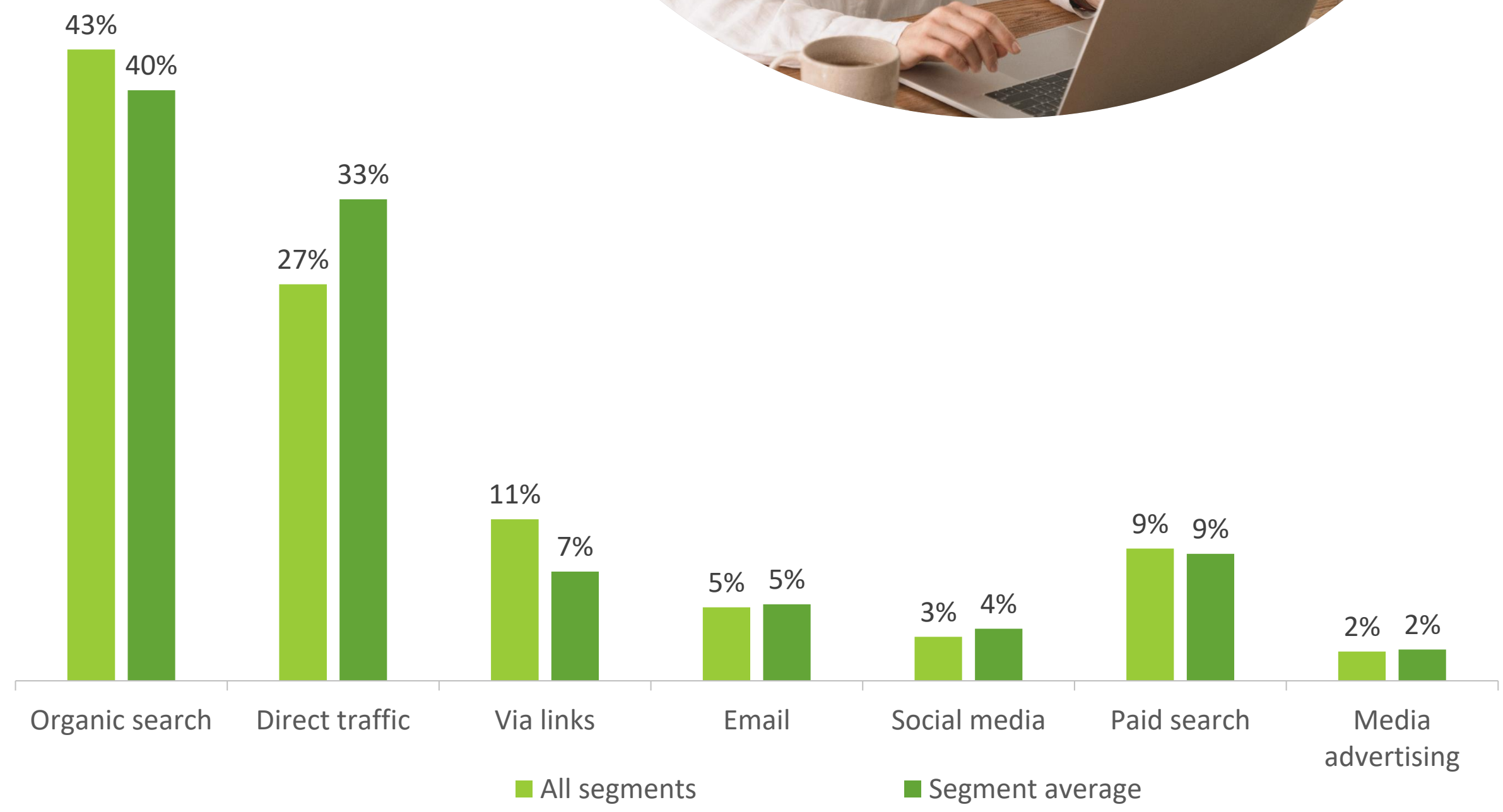
** Excluding one-stop marketplace apps.*



Promotion channels



Sources of traffic



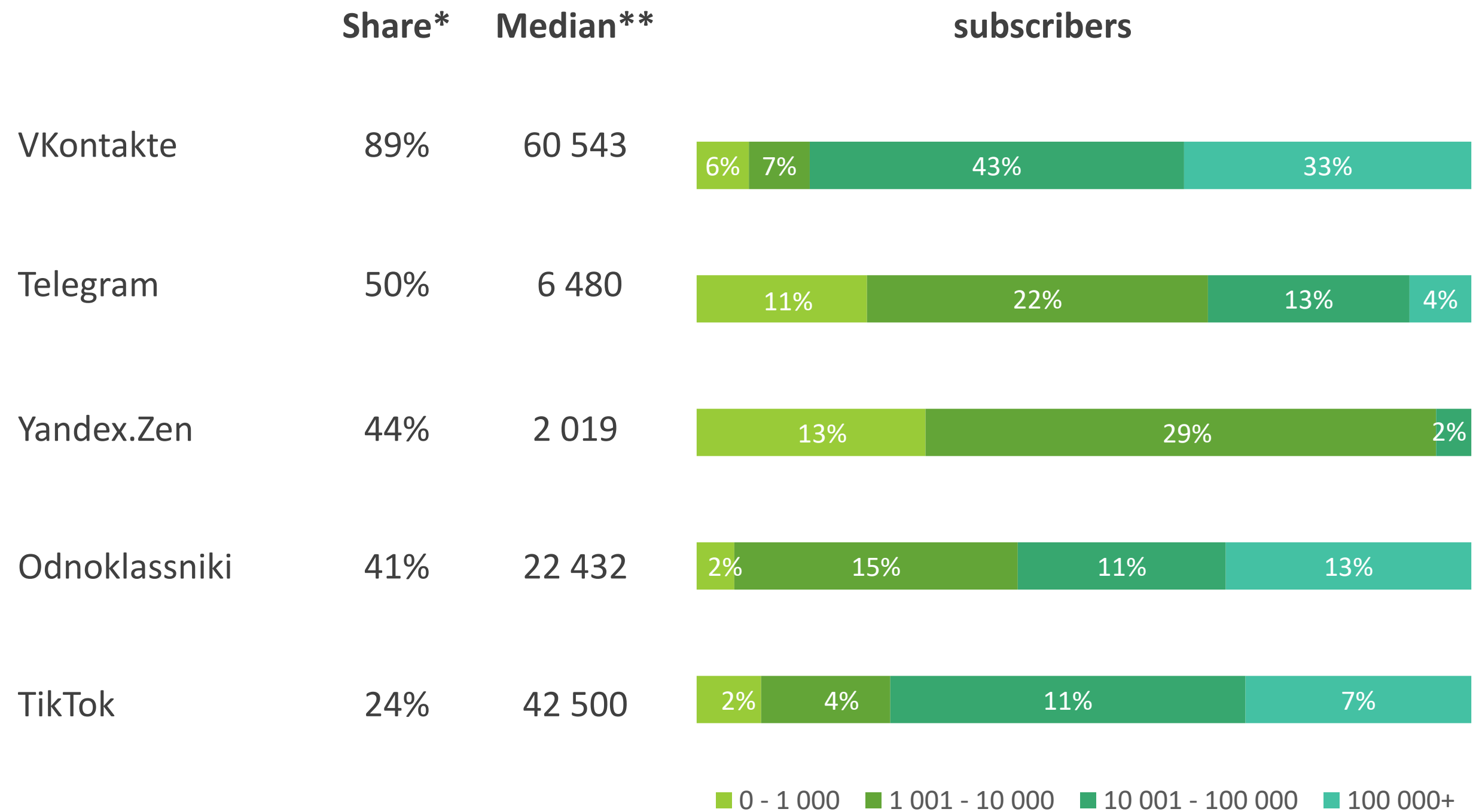
The structure of traffic sources in the segment of online cosmetics stores does not differ significantly from the average values for the entire eCommerce market. The biggest difference is in the increased share of direct referrals (33% in the segment versus 27% on average).

According to SimilarWeb; the average figures for 54 online stores are given excluding the "weight" of the store in the total traffic of the segment.

Social media activity

The most popular social network in the cosmetics segment is VKontakte. 89% of stores have their communities in it, while 76% of cosmetics stores have more than 10,000 subscribers.

Distribution of accounts of online cosmetics stores by the number of subscribers



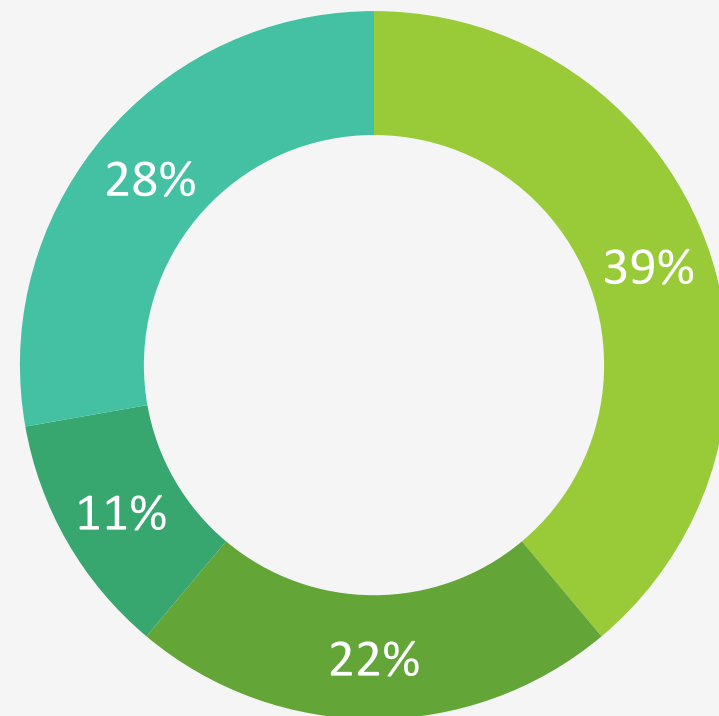
* The share of online stores using the social network is indicated.

** The median number of subscribers is indicated.

Technologies used



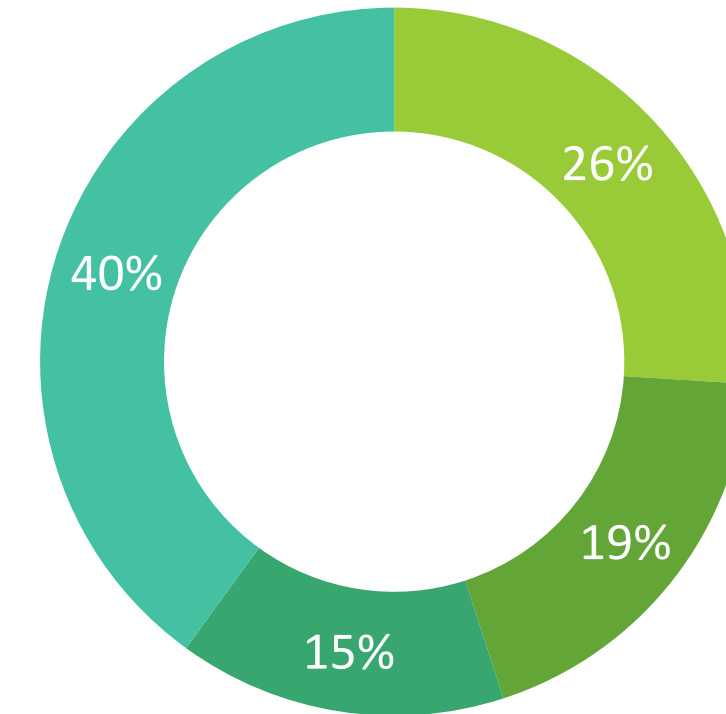
CMS



- In-house developed
- 1C-Bitrix
- Magento
- Other CMS

39% of online cosmetics stores use CMS of their own design (CMS is a system for creating, managing and editing website content). 1C-Bitrix is used by 22% of online stores. Magento is used by 11% of online stores. 28% use other CMS.

Email-newsletter

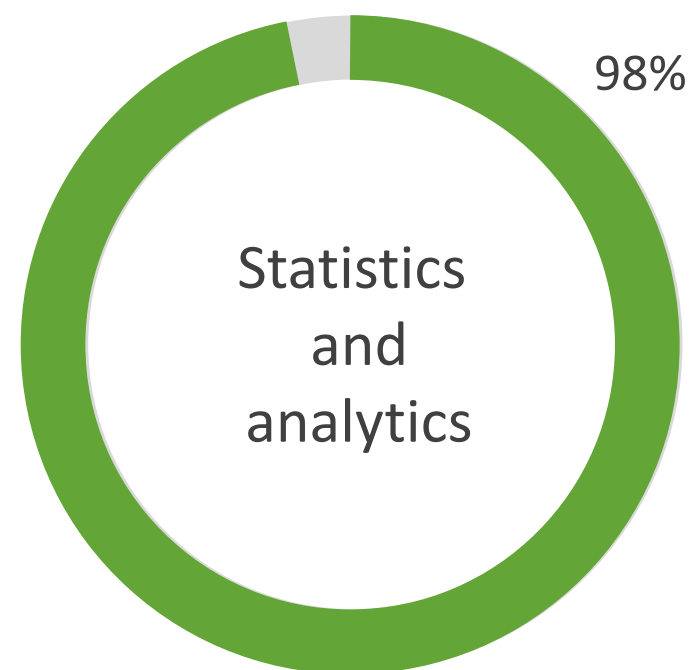


- In-house developed
- Mindbox
- No newsletter
- Other services

26% of online stores use in-house developed services for their newsletters. 19% use the MindBox. 15% of stores do not have a newsletter. The remaining 40% use the services of other mailing services.

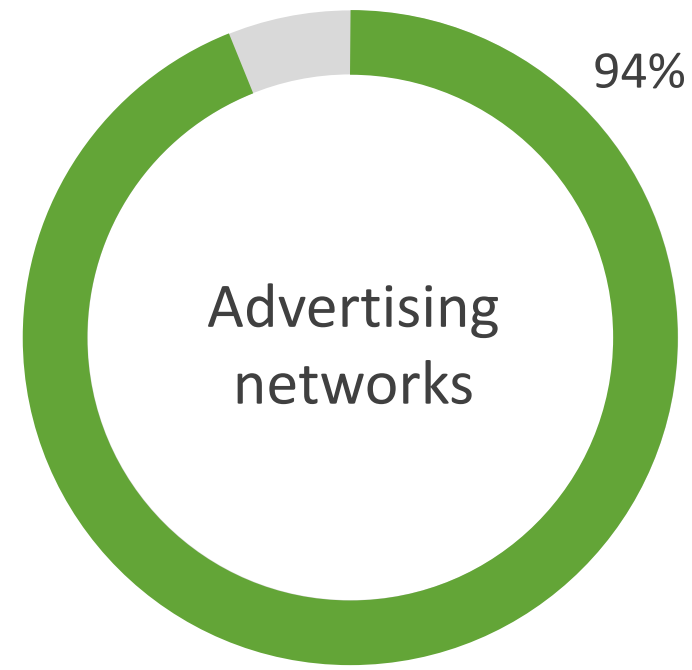
Marketing services

Share of online stores that use marketing services



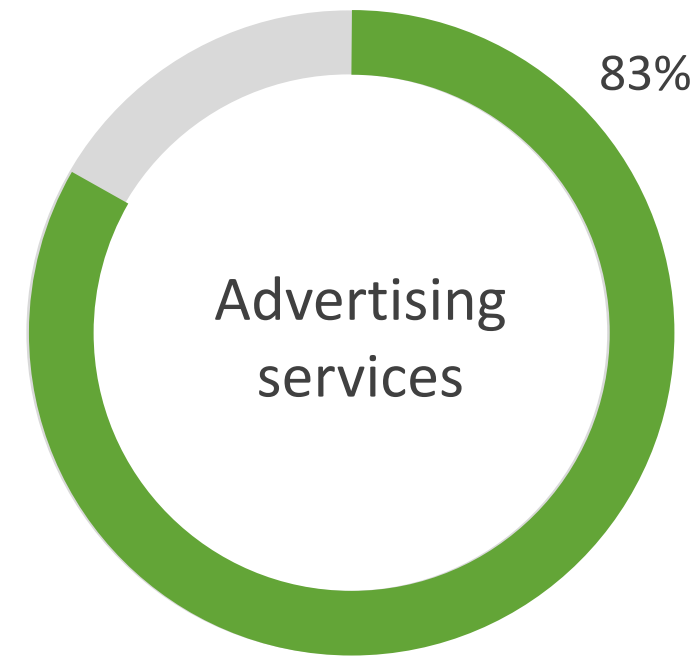
Yandex.Metrica, Google Analytics, call tracking, tracking traffic and customer behavior on the site

🏆 Yandex.Metrica – 93%
Google Analytics – 93%



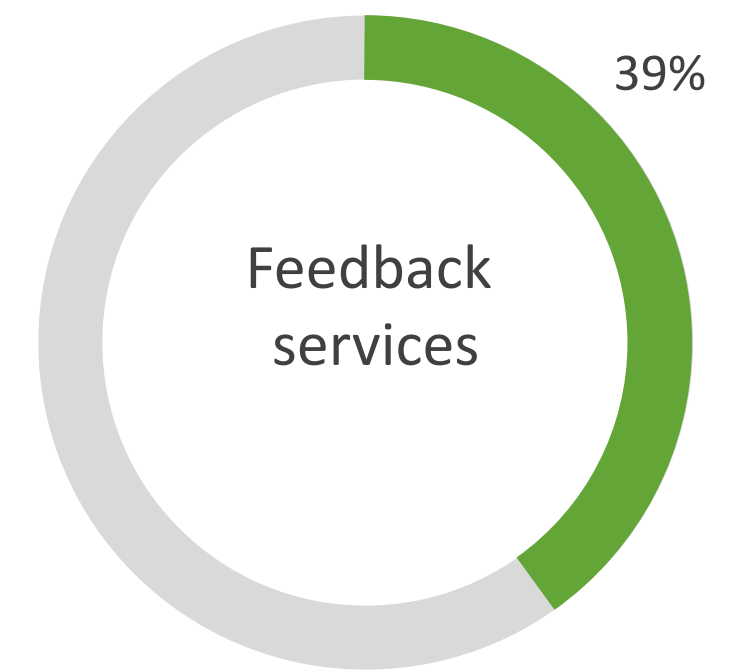
Networks for advertising on the pages of other members of the advertising network

🏆 DoubleClick.Net- 93%



Ad management and personalization services

🏆 Criteo – 46%



Online and email communication, callback services

🏆 JivoSite – 17%



News

News in Russia

- February [Lamoda](#) launches sales of Kenzo fragrances
- April [Magnit \(«Магнит»\)](#) began the implementation of E-Visage technology, which allows testing makeup in augmented reality mode
- May [Beauty-trends](#) of spring 2021. Russians began to buy expensive cosmetics more often
- [Henderson](#) will create a line of cosmetics together with clients
- July Podrzhki («Подружки») is represented on [Aliexpress](#)
- August [Yandex.Delivery \(Яндекс.Доставка\)](#) will deliver cosmetics in 2-4 hours
- September [Samokat \(«Самокат»\)](#) has launched sales of cosmetics under its own brand
- October 30% of [Golden Apple's \(«Золотое яблоко»\)](#) revenue comes from e-commerce
- November [Lenta \(«Лента»\)](#) will open Rive Gauche outlets in its stores

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World news

- January [The Sims](#) collaborates with MAC makeup brand
- February Japanese [clothing online store ZOZO](#) launches beauty platform ZOZOCOSME with ZOZOGLASS skin tone recognition technology
- May Users of [Snapchat](#) will be able to 'try on' and buy MAC makeup in the app
- June [Beauty boom](#): online sales of cosmetics for 2020-21 showed a decade growth
Online sales of [L'Occitane](#) have grown by 69% due to social media engagement
- July Share of online channel [Uniliver](#) was 11% in the first half of the year, the growth of online sales was 50%
- August [Edge Retail Insight](#) forecast: Within the next five years, health e-commerce and beauty will grow more than three times faster than store sales
- September How [cosmetics retailers](#) increase online sales with web tools
- October [Tajmeeli](#) research: L'Oréal Paris is the most popular beauty brand in the world in the Internet


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Full Version of the Report

- ✓ TOP10 by the number of **orders**
- ✓ TOP10 by the **revenue**
- ✓ TOP10 by the number of website visitors **visitors** number (plus dynamics)
- ✓ Conversation rates in **TOP10**
- ✓ **Technologies** in TOP10 (CMS, e-mail, marketing services)
- ✓ **Mobile traffic** share in TOP10
- ✓ **Mobile apps** review
- ✓ **Promotion channels** share in TOP10 traffic
- ✓ Pivot with TOP10 the following indicators: **website visitors, conversion rates, orders, AOV, and revenue numbers**


 Volume: 50 slides

 Period: 2 days after payment

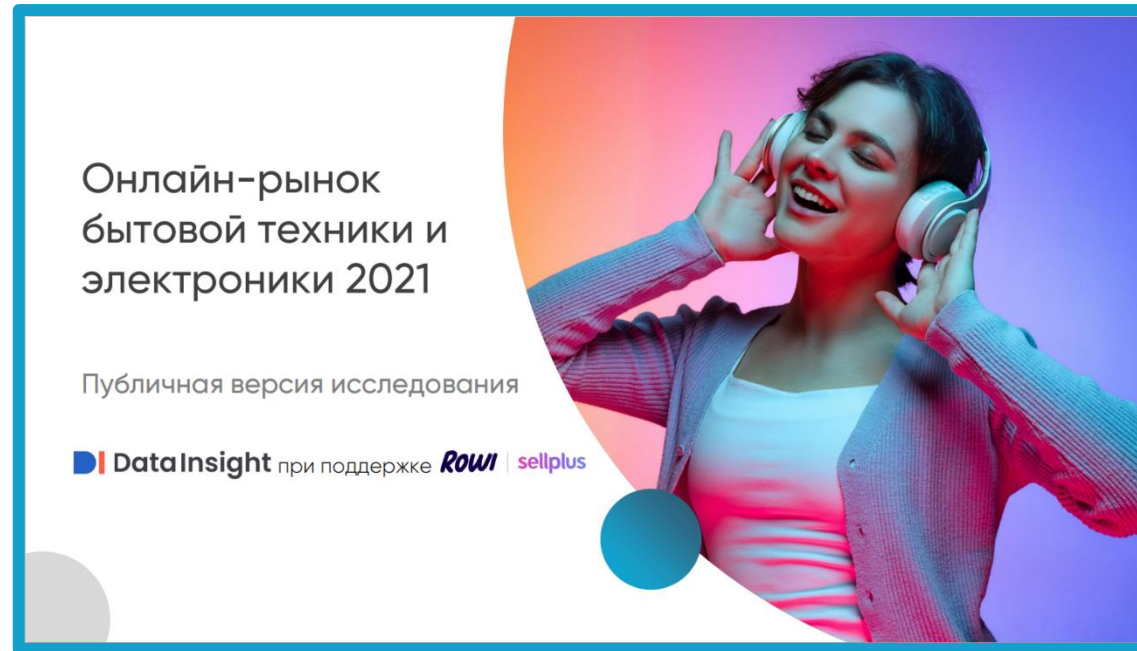
 Price: 72 000 rub, VAT included

Learn more and order:

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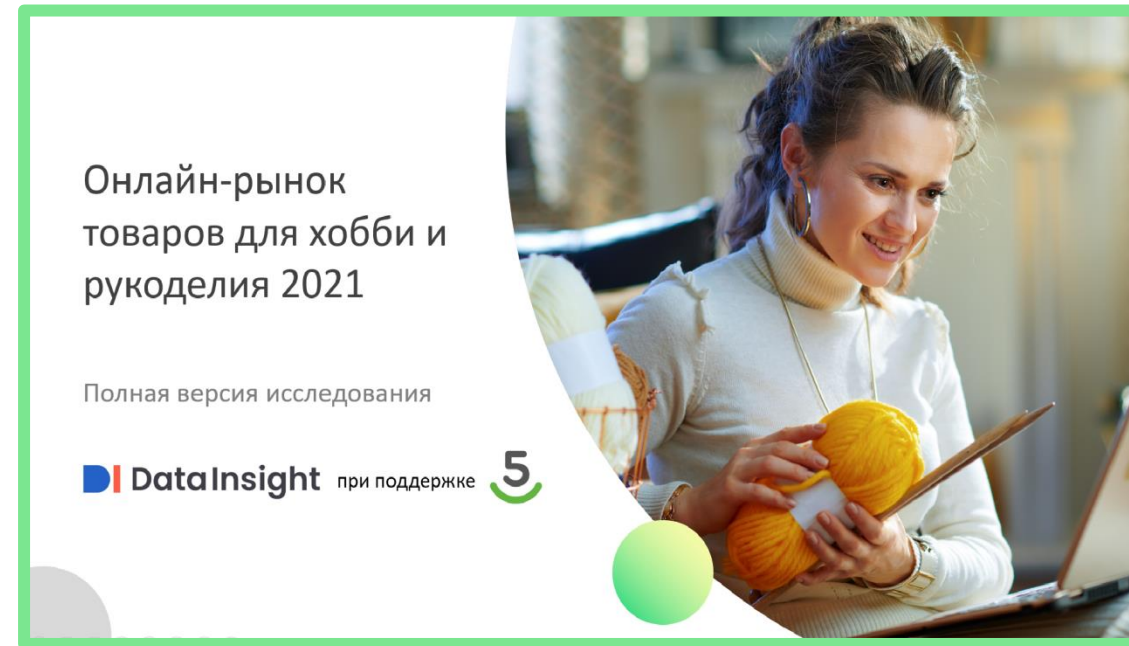
Our reviews by segment



Онлайн-рынок бытовой техники и электроники 2021

Публичная версия исследования

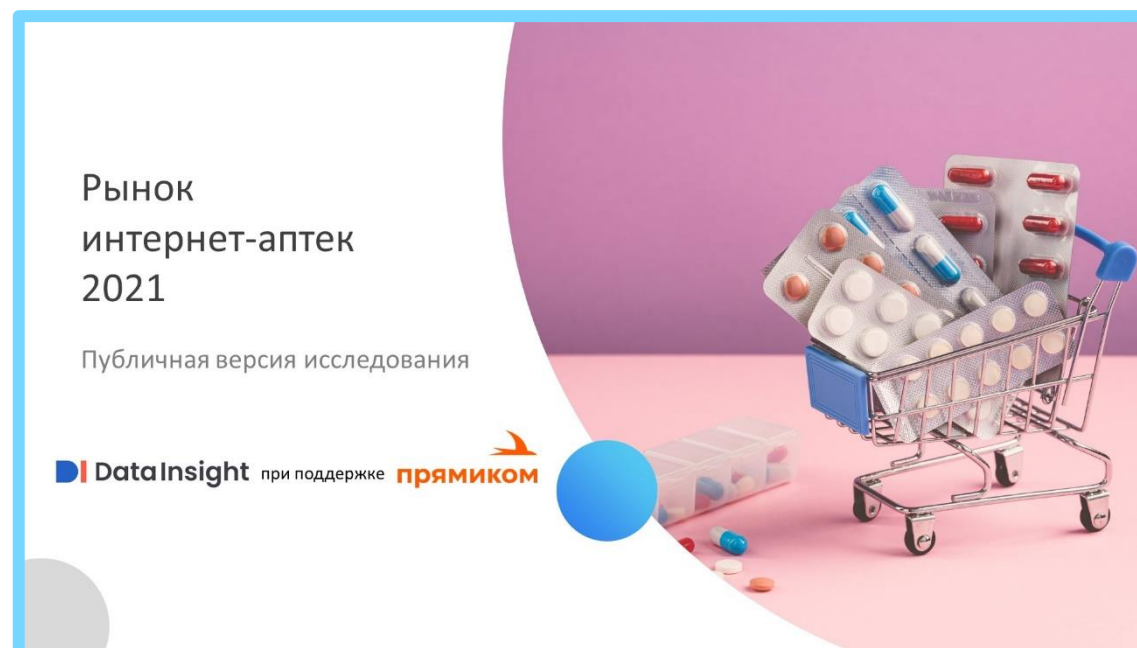
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Онлайн-рынок товаров для хобби и рукоделия 2021

Полная версия исследования

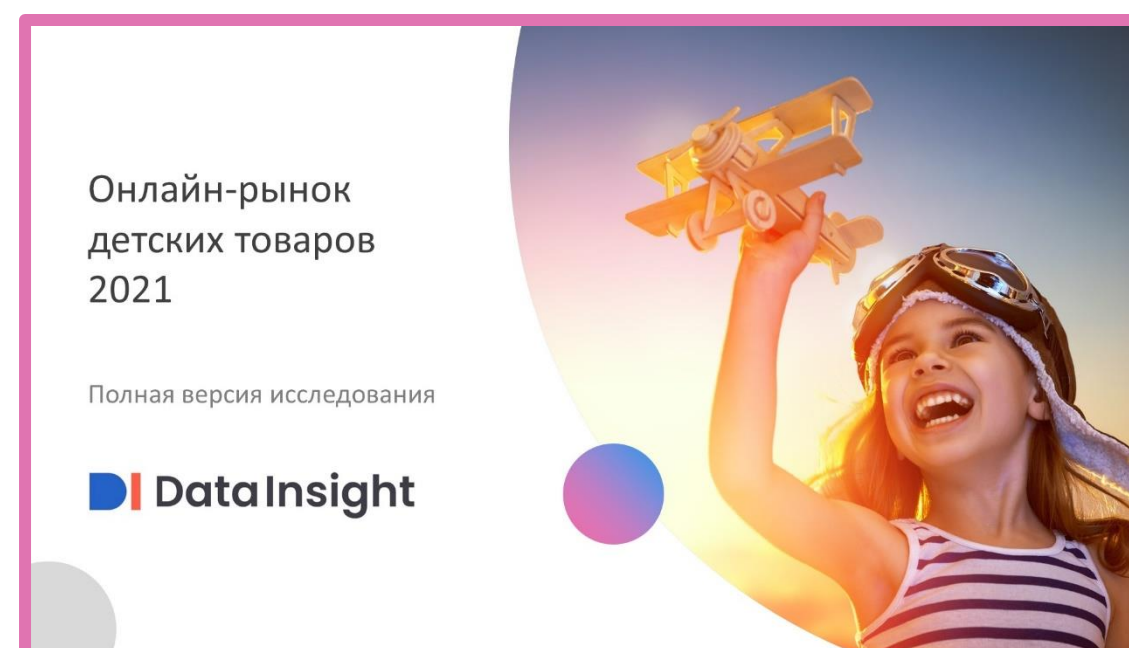
Data Insight при поддержке 5



Рынок интернет-аптек 2021

Публичная версия исследования

Data Insight при поддержке прямиком



Онлайн-рынок детских товаров 2021

Полная версия исследования

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[Pet products](#)



[Foodstuffs](#)

Planned for the near future:



Online pharmacies



Food

About the research partner



ROWI (rowi.com) — ROWI (rowi.com) is a fintech platform for SMEs with a wide range of its own digital financial products: **factoring**, bank guarantees, financing for the execution of government contracts, as well as a relatively new product for sellers on the market - **business financing on marketplaces - Sellplus**.

Sellplus (sellplus.ru) — fast business financing on Wildberries, Ozon, Yandex.Market. Any company that regularly trades on the marketplace for more than 3 months can take advantage of **revolving funding**. The limit is automatically restored by the amount of each repayment, which **solves the problem of rapid business scaling**.

The ROWI platform for SMEs was launched in 2019 jointly with QIWI and currently continues to create convenient financial products for suppliers of goods and services in various industries throughout Russia, thanks to ROWI.tech's own IT development and technology core.

ROWI is an active participant in SME support and development programs and occupies a leading position in terms of the number of new customers.

Company's mission: to create new opportunities for small and medium enterprises – quickly and with the best service.



Data Insight

Data Insight is the first agency in Russia specializing in research and consulting in the field of eCommerce and other online markets



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