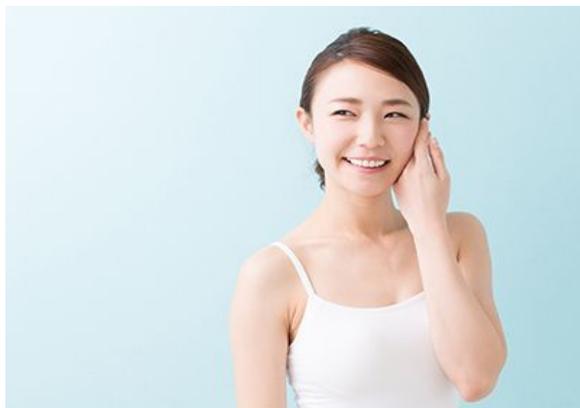


Bodycare - China - June 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Bodycare in China has long been all about moisturising and lack of innovation. But consumers are asking for more than pure moisturising, as they demonstrate various demands for body skin improvements and particularly high earners have opted for advanced products like body treatment oil rather than basic body moisturisers.”

– Alice Li, Research Analyst

This report looks at the following areas:

- Explore other benefits besides moisturising
- Leverage ingredients to express natural theme
- Expand seasonal offerings

The bodycare market in China has achieved solid growth in recent years but the outlook is challenging, as the penetration of basic moisturising products is saturating and other sub-categories are lacking both consumer attention and product innovation. Moreover, consumers’ evolving lifestyles drive them to pursue beauty from within, sensory experiences such as SPA, or healthier living such as daily diet control and exercising, which all could limit usage of bodycare products. But there are still opportunities for brands to drive up growth in this market, such as catering to consumers’ growing needs for product naturalness and improving product texture and packaging.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Bodycare - China - June 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know
 Covered in this Report
 Sub-group definitions
 Household income

Executive Summary

The market

Figure 1: Best- and worst-case forecast of total value sales of bodycare market, China, 2012-22
 Figure 2: Value and share of bodycare market, by segment, China, 2016 and 2017 (est)

Companies and brands

Figure 3: Market share of leading companies in bodycare market, China, 2015 and 2016

The consumer

Bodycare as a relatively high prioritised category to invest in

Figure 4: Changes in spending over the last six months, by category, January 2017

Consumers want fewer wrinkles and fine lines this year

Figure 5: Ideal skin conditions, 2017 vs 2015

Various measurements to manage body skin

Figure 6: Methods of skin management in the last six months, January 2017

Moisturiser-based usage

Figure 7: Bodycare products used in the last six months, January 2017

Natural is an ingredient story

Figure 8: Features of a natural bodycare product, January 2017

Lotions and with pumps seen as most appealing product features

Figure 9: Appealing product features, January 2017

What we think

Issues and Insights

Explore other benefits besides moisturising

The facts

The implications

Figure 10: Jergens Wet Skin Moisturiser, US, 2015

Figure 11: Examples of moisturisers with anti-aging/anti-wrinkles claims, India and South Africa, 2017

Figure 12: Ahava Firming Body Cream, France, 2016

Leverage ingredients to express natural theme

The facts

The implications

Figure 13: Ingredient information from L'Occitane, China, 2017

Figure 14: Yes To product collections, US, 2017

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Bodycare - China - June 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 15: Examples of products using biodegradable cellulose, US, 2016

Expand seasonal offerings

The facts

The implications

Figure 16: Examples of seasonal bodycare products, China and Japan, 2016

Figure 17: Example of bodycare product with summer scent, UK, 2016

The Market – What You Need to Know

Slowing but sustained growth

Bodycare and handcare lead the growth

Premiumisation driving the growth but challenges ahead

Market Size and Forecast

Growth is slowing down...

Figure 18: Market value of bodycare, China, 2013-17 (est)

...and the trend continues in the next five years

Figure 19: Best- and worst-case forecast of total value sales of bodycare market, China, 2012-22

Market Factors

More evident premiumisation trend

Figure 20: New bodycare product launches, by price positioning, China, 2015-May 2017

Lack innovation and investment in niche sub-categories

Cross-category competition from shower products

Market Segmentation

Figure 21: Value and share of bodycare market, by segment, China, 2016 and 2017 (est)

General bodycare reigns

Hand and nail care leading the growth

Footcare still lacks attention

Key Players – What You Need to Know

Domestic players perform stronger

Different ways to justify premiumisation

Botanical/herbal ingredients expanding their presence in bodycare

Market Share

Domestic players are catching up

Figure 22: Market share of leading companies in bodycare market, China, 2015 and 2016

Specialised bodycare brands have potential

Competitive Strategies

Enrich product range by offering premium variants

Figure 23: Examples of Maxam hand cream, China, 2015-16

Figure 24: Examples of Pechoin hand cream, China, 2015

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Bodycare - China - June 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Cultivate professional brand image

Figure 25: Examples of Vaseline's campaigns, China, 2016

Who's Innovating?

Hand and nail care seeing more genuine product innovations

Figure 26: New bodycare product launches, by segment, China, 2014-16

Botanical/herbal ingredients increasingly popular

Figure 27: Top product claims in bodycare launches, China, 2015 and 2016

Innovative new products

SPA in a box

Figure 28: Examples of VOESH's Pedi in a box, US, 2017

Claim for phone addicts

Figure 29: Example of Opera's essence capsule in hand cream, China, 2017

Body make-up

Figure 30: Example of body make-up products, US, 2016

The Consumer – What You Need to Know

Relatively high in consumers' spending priorities

Varying demands for skin improvements

Daily diet control is the top option for body skin management

Moisturisers have the highest penetration

Natural is all about ingredients

Lotion and with pumps are consumers' favourites

Previous Spending per Category

An unwavering category

Figure 31: Changes in spending over the last six months, by category, January 2017

High earners from lower-tier cities and at younger age are spending more

Figure 32: Spending more on body skincare over the last six months, by city tier and monthly personal income, January 2017

Figure 33: Spending more on body skincare over the last six months, by age and monthly personal income, January 2017

Ideal Skin Conditions

Moisturising widens the gap with smoothing and whitening

Figure 34: Ideal skin conditions, 2017 vs 2015

Increasing demands for fewer wrinkles and fine lines

Figure 35: Percentage of consumers who want to have fewer wrinkles and fine lines, by age, 2017 vs 2015

Whitening is no longer the top priority for consumers aged 20-24

Figure 36: Changes on ideal skin conditions, age 20-24, 2017 vs 2015

Methods of Body Skin Management

Exercising and diet control may pose challenges

Figure 37: Methods of skin management in the last six months, January 2017

Salon/SPA concepts appeal to high earners

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Bodycare - China - June 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 38: Methods of skin management in the last six months, by monthly personal income, January 2017

Bodycare products cannot yet fulfil sensitive skin

Figure 39: Methods of skin management, by ideal skin conditions, January 2017

Product Usage

Basic moisturisers have the highest penetration

Figure 40: Bodycare products used in the last six months, January 2017

High earners go beyond basics

Figure 41: Bodycare products used in the last six months, by monthly personal income, January 2017

Are different moisturisers cannibalising each other's market?

Figure 42: Bodycare products used in the last six months, by used products, January 2017

Demands for skin conditions don't significantly drive consumers to use specialised products

Ideal Natural Bodycare Product

Perceptions of 'natural' centralised on ingredient

Figure 43: Features of a natural bodycare product, January 2017

'Natural' is hard to represent safety

20-24s exhibit different understanding

Figure 44: Features of a natural bodycare product, by age, January 2017

Appealing Product Features

Lotion preferred over cream

Figure 45: Appealing product texture features, by age, January 2017

Pumps is the most popular packaging

Figure 46: Appealing product packaging features, by age, January 2017

High earners embrace different product features

Figure 47: Appealing product features, by monthly personal income, January 2017

Meet the Mintropolitans

MinTs are generous on beauty spending

Figure 48: Percentage of spending more on these categories, by consumer classification, January 2017

Bouncier skin is the top priority for MinTs

Figure 49: Ideal skin conditions, by consumer classification, January 2017

Beauty supplements and beauty services are more important options for MinTs

Figure 50: Methods of skin management in the last six months, by consumer classification, January 2017

Appendix – Market Size and Forecast

Figure 51: Total value sales of bodycare market, China, 2012-22

Appendix – Market Segmentation

Figure 52: Total value sales of general bodycare segment, China, 2012-22

Figure 53: Total value sales of hand & nail care segment, China, 2012-22

Figure 54: Total value sales of footcare segment, China, 2012-22

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Bodycare - China - June 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Appendix – Methodology and Abbreviations

Methodology

Fan chart forecast

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com