

Fragrances - China - April 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

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



“With Chinese beauty consumers increasingly shifting to online, it is becoming crucial for fragrance brands and retailers to expand their digital presence. Digitalisation doesn’t just mean selling products online or opening social media accounts; what’s more important is how to evoke the sense of smell and provide a sensorial experience and ultimately assist consumers in finding the right fragrance.”

– **Alice Li, Senior Research Analyst**

This report looks at the following areas:

- Promote gifting to lift the market
- Enhance the fragrance shopping experience
- Help consumers build a fragrance wardrobe

The China’s fragrances market is estimated to grow steadily in 2018 and reach value sales of RMB5,815 million, driven by the stronger performance of premium fragrances. Although the market has been growing at a slower pace than other active beauty categories such as skincare and colour cosmetics, it is likely to continue to expand in the next five years, thanks to growing diversity in product offerings and retail models that keep consumers engaged, as well as the increasing popularity of niche fragrances among younger consumers.

**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

Fragrances - China - April 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

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 (by monthly personal income)

Executive Summary

The market

- Figure 1: Retail value and growth rate of fragrances market, China, 2014-18
- Figure 2: Best- and worst-case forecast of retail value of fragrances market, China, 2013-23

Companies and brands

- Figure 3: Leading manufacturers' share in value sales of fragrances, China, 2017 and 2018

The consumer

Overall penetration is low despite the popularity of perfumes

- Figure 4: Fragranced products purchased in the last six months, by purposes, February 2019

Perfume users report relatively regular usage

- Figure 5: Usage frequency of fragranced products, February 2019

Consumers wear fragrances for emotional benefits

- Figure 6: Reasons for buying fragrances for personal use, February 2019

Exquisite design makes fragrances good gifts

- Figure 7: Reasons for buying fragrances as gifts for others, February 2019

Smelling the product prior to purchase is necessary for most consumers

- Figure 8: Preference of trial in purchasing fragrances, by gender, February 2019

Customised scents are more sought-after than DIY sets

- Figure 9: Interest in customised fragrances, February 2019

What we think

Issues and Insights

Promote gifting to lift the market

The facts

The implications

- Figure 10: Examples of fragrances launched for Father's and Mother's Day, Brazil and China, 2018
- Figure 11: Examples of fragrances that evoke memories, Japan and Turkey, 2018
- Figure 12: Examples of customisable layering fragrance set, China and US, 2019

Enhance the fragrance shopping experience

The facts

The implications

- Figure 13: Example of Phlur fragrances, US

Create new digital touchpoints to engage consumers

- Figure 14: Examples of stories on Olfaplay, France, 2018

**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

Fragrances - China - April 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

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

Help consumers build a fragrance wardrobe

The facts

The implications

Figure 15: Sephora Favorites Designer Fragrance Wardrobe, US, 2018

The Market – What You Need to Know

Premium fragrances lead market growth

Growing diversity in product offerings and retail models fuel future growth

Market Size and Forecast

Premium fragrances drive market growth

Figure 16: Retail value and growth rate of fragrances market, China, 2014-18

Figure 17: Best- and worst-case forecast of retail value of fragrances market, China, 2013-23

Market Factors

Fragrances remain a relatively low spending priority for women

Figure 18: Changes in spending over the last six months, by category, June 2018

Scented personal care may impact the market

Newcomers enrich product offerings

Figure 19: New fragrances from Zara and Innisfree, China, 2019

Evolving retail models give a lift

Key Players – What You Need to Know

A market dominated by foreign players

Seasonal and limited edition launches stimulate the market

Widespread customisation options

Market Share

Market share remains in the hands of foreign players

Figure 20: Leading manufacturers' share in value sales of fragrances, China, 2017 and 2018

Figure 21: New fragrances launches from leading brands, China, 2018

Niche brands are more standout performers

Figure 22: Atelier Cologne Discovery Set Tmall limited edition, China, 2019

Local brands start to emerge

Figure 23: Example of RECLASSIFIED perfume blending service in store, China

Figure 24: Examples of Uttori and Fukodo fragrances, China

Competitive Strategies

Seasonal and limited edition launches drive purchase

Figure 25: Examples of new fragrances launches with a seasonal or limited edition claim, China, 2018

IP integration prevails in the fragrances market as well

Figure 26: Examples of new fragrances launches with IP integration, China, 2019

UGC helps market fragrances online

**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

Fragrances - China - April 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

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

Figure 27: Examples of product reviews on Atelier Cologne's Tmall flagship store, China

Boutiques fulfil China's growing appetite for little-known fragrances

Figure 28: Minorité fragrance salon, China, 2018

Who's Innovating?

Attaching themselves to health benefits

Figure 29: Examples of fragrances with a wellbeing claim, France and Germany, 2018

Figure 30: Clarins Eau Dynamisante Treatment Fragrance, China, 2018

Format/texture innovations spark interest in a liquid-dominated market

Figure 31: Examples of fragrances in innovative formats and textures, global, 2018

Fragrances with a message

Figure 32: Feminista Eau de Parfum, Europe, 2018

Figure 33: Examples of fragrances that focus on empowering women, global, 2018

Customisation moves into mainstream

Figure 34: Examples of layering fragrances, US, 2018

Figure 35: Commodity Style Guide, US, 2018

Figure 36: Scent Trunk's fragrance customisation process, US

The Consumer – What You Need to Know

42% have bought perfumes for personal use and 33% have bought for gifting

Over half of category users use perfumes daily

Functional benefits are a less important consideration factor for fragrances

Most consumers need to try out the product before purchase

60% want a customised scent based on their fragrance preferences

Purchase Behaviours

Purchase for personal use is stronger than gifting

Figure 37: Fragranced products purchased in the last six months, by purposes, February 2019

Perfumes are popular, but overall penetration is low

High earners are not stronger buyers

Figure 38: Perfumes purchased in the last six months, by purposes and monthly personal income, February 2019

30-39s are core users; 25-29s are more likely to be gift givers

Figure 39: Perfumes purchased in the last six months, by purposes and age, February 2019

Usage Behaviours

Over half of users use perfumes on a regular basis

Figure 40: Usage frequency of fragranced products, February 2019

High earners are more likely to be regular users

Figure 41: Usage frequency of perfumes, by monthly personal income, February 2019

Young consumers use scented personal care products more frequently

Figure 42: Usage frequency of fragranced products – Daily or almost daily, by age, February 2019

Reasons for Wearing Fragrances

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

Fragrances - China - April 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

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

Fragrances can give a confidence boost

Figure 43: Reasons for buying fragrances for personal use, February 2019

Men wear fragrances for social needs; women want to treat themselves

Figure 44: Reasons for buying fragrances for personal use, by gender, February 2019

Older consumers also have strong demand for expressing individuality

Figure 45: Reasons for buying fragrances for personal use, by generation, February 2019

Reasons for Gifting Fragrances

Exquisite is more important than practical

Figure 46: Reasons for buying fragrances as gifts for others, February 2019

Figure 47: Boitown Blue In Night and Velvet White Eau de Toilette, China, 2019

Women like exquisite and fashionable design; men buy fragrances as an intimate gift

Figure 48: Reasons for buying fragrances as gifts for others, by gender, February 2019

Purchase Habits and Preferences

Smelling the product before buying is still necessary, especially for men

Figure 49: Preference of trial in purchasing fragrances, by gender, February 2019

The majority of consumers choose fragrances by scent notes

Figure 50: Criteria of choosing fragrances, February 2019

Younger consumers welcome recommendations

Figure 51: Influencer of choosing fragrances, by age, February 2019

Women are more likely to choose fragrances depending on mood

Figure 52: Habits of wearing fragrances, by gender, February 2019

Niche fragrance users present opportunities

Figure 53: Brand preference of fragrances, by age, February 2019

Figure 54: preference of trial in purchasing fragrances, by brand preference of fragrances, February 2019

Figure 55: Habit of wearing fragrances, by brand preference of fragrances, February 2019

Customisation Needs

Customised scents are most wanted

Figure 56: Interest in customised fragrances, February 2019

Surprisingly men are driving interest in customisation

Figure 57: Interest in customised fragrances, by gender, February 2019

Meet the Mintropolitans

MinTs show stronger usage of a variety of products...

Figure 58: Fragranced products purchased in the last six months for personal use, by consumer classification, February 2019

...while their purchase habits are similar to non-MinTs

Figure 59: Attitudes towards fragrances, by consumer classification, February 2019

Intimacy is more important to MinTs

Figure 60: Reasons for buying fragrances as gifts for others, by consumer classification, February 2019

Appendix – Market Size and 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

Fragrances - China - April 2019

Report Price: £3302.97 | \$4460.00 | €3717.16

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

Figure 61: Retail value of fragrances market, China, 2013-23

Appendix – Methodology and Abbreviations

Methodology

Fan chart forecast

Abbreviations

**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