March 2021

洗手洗浴用品 - China

“新冠疫情爆发后，消费者的个人清洁需求猛增，洗手液成为一大赢家品类，而泡澡和沐浴产品市场增长相对较慢。消费者对产品的需求升级——从追求实际功效到对护肤和情感功效的追求，这一趋势也驱动着产品创新和消费升级。”

– 周文棋，研究分析师

February 2021

年轻一代美容消费者 - China

“美妆已经超越了功能性的范畴，成为一种较为强烈的自我表达形式。过去，美妆品牌主导着美容潮流，并期望年轻消费者亦步亦趋，而如今，品牌的这种意见领袖地位正迅速弱化。取而代之的是，它们需要帮助年轻消费者发现和表达自身独特的美。

与此同时，品牌需要对年轻消费者的消费能力建立符合实际的认知，因为这制约着这些消费者的产品使用和品牌选择。高性价比依然重要，品牌在定价方面可以更加透明，以赢得年轻消费者的信任。”

– 李玉梅，高级研究分析师

美妆意见领袖 - China

“随着中国消费者的购买流程愈发复杂，美妆意见领袖的影响力也愈发分散。传统的意见领袖营销对提升品牌知名度和销售仍十分重要，但围绕真实性和多元化的问题或预示着未来挑战。要想消除疑虑，美妆广告可以启用更多真实消费者，利用口碑效应和熟人营销的影响力；美妆品牌也可以打造自己的意见领袖，代表品牌个性。”

– 李玉梅，高级研究分析师

美容仪器 - China

“尽管中国的美容仪器市场正在蓬勃发展，但是随着越来越多国际和国内品牌的加入与扩张，这一市场正在变得愈发拥挤，并进入一个全新阶段——如果品牌无法满足消费者不断变化和升级的需求，并且产品功效和安全性低下，最终将会被淘汰。”

– 尹昱力，研究分析师

婴幼儿护理用品 - China

“中国生育率下降，意味着婴幼儿护理用品市场将更依赖于每位婴幼儿消费支出的增加。家长们在选购产品时总是将安全性和专业性放在首位；因此展现能满足那些基本需求的卓越产品质量是关键。此外，品牌可以通过道德和环保相关特点来提升高端性，以在激烈竞争中脱颖而出。”

– 靳尧婷，研究分析师

Nappies - China

“Fewer newborns means market growth will be more reliant on spending per capita. Brands need to provide high quality products not only satisfy parents’ basic needs of breathability material but innovating on products with specialized patent, also for ultra-sensitive skin conditions with additional skin care benefits could be a way ...

January 2021

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Soap, Bath and Shower Products - China

"Hand sanitizer has emerged as a winning category after COVID-19 due to growing demand for personal hygiene, while the bath and shower product market grew relatively slower. Consumers have upgraded their demand from functional-driven to skinare and emotional benefits, driving product innovation and premiumisation."

– Vicky Zhou, Research Analyst

Baby Personal Care - China

"A declining birth rate in China means that the baby personal care market will rely more on increased spending per baby. Parents will always prioritize safety and professionalism when choosing products; therefore demonstrating excellent product quality that satisfies those basic needs is key. In addition, brands can leverage premiumisation with ...

Beauty Influencers - China

"As Chinese consumers' purchase journeys become more complex, the influence landscape is also becoming fragmented. While traditional influencer marketing will remain important to drive brand awareness and sales, issues surrounding authenticity and diversity could signal future challenges. To alleviate these concerns, beauty campaigns could feature more real consumers to leverage ...

防晒产品 - China

"2020年，新冠疫情拖累了此前形成的中国防晒产品市场的快速增长。而在室内和城市环境中使用防晒产品的意识不断增加，室外活动减少以及佩戴口罩对该市场的影响非常小。这些使用场景叠加消费者对美的兴趣持续支撑市场正增长。展望未来，防护力、安全性和适用性将成为近期新产品发布的基本驱动力，以回应消费者的需求，这有助于迅速恢复市场的增长势头。品牌未来机会点在于更好地沟通和科普产品的防护效果，扩大防晒范围和可抵御各种外部因素的防护力，以及通过使用有效性经科学证明的天然成分来构建安全形象。在防晒产品中跨界护肤品的概念、，通过护肤特质更好地迎合消费者不断发展的皮肤需求，也将为市场带来额外价值和消费兴趣。"

December 2020

Young Beauty Consumers - China

"Beauty has transformed beyond its functional nature to become a stronger form of self-expression. Beauty brands have a fast-diminishing moral authority to dictate beauty trends and expect young consumers to follow. Instead, they now need to support young consumers in finding their own beauty and expressing themselves. In the meantime ...

美容服务 - China

"中国美容服务市场经历了宏观环境变化时期，监管更严格，信息更透明。消费者需求并未受新冠疫情抑制，但在这一效果驱动的市场，他们也需要切实证据来证明美容效果。消费者对技术创新的兴趣带来机会，而线上渠道的参与推动了对消费者的科普。"

– 周文棋，研究分析师

女士面部护肤品 - China

Beauty Devices - China

"Although growth is booming, with more international and domestic brands entering and expanding, the China beauty devices market is becoming over-crowded and entering a stage where players that cannot offer devices that meet consumers' shifting and upgrading demands and inferior efficacy and safety will be shed."

– Anne Yin ...

婴幼儿纸尿裤 - China

"新生儿数量减少，意味着市场增长将更依赖于人均消费情况。品牌需提供高品质的产品，不仅要满足家长对纸尿裤透气性材料的基本需求，还要通过专利对产品进行创新。同时，品牌针对超敏感肌肤在产品中添加护肤功效，也是从激烈竞争中脱颖而出的一种方式。"

– 靳尧婷，研究分析师

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“得益于高端品类的发展和线上业务的扩张，女士面部护肤品销售额在近年来强势增长。渗透率颇高且继续上涨，尤其是精华和眼霜等面部护理产品，说明女性不断寻求更先进的护肤方案。长远来看，健康将成为拉动消费者需求的最重要因素。护肤品将融入消费者的生活方式，不仅改善皮肤健康，也关注消费者的情绪，从而帮助消费者获得整体健康。”

– 李玉梅，高级研究分析师

November 2020

Beauty Services - China

“The beauty service market in China has embraced a period of macro-environment changes with stricter regulation and more transparent information. Consumers’ demand has not been dampened by COVID-19, while they also need real proof in this result-driven market. The interest in technological innovation brings opportunity, while the involvement of online ...

Women's Facial Skincare - China

“The women’s facial skincare market has seen strong value growth year-on-year, driven by the prestige sector and the expansion of online business. Penetration is very high and continues to rise, especially facial treatment products such as serum and eye cream, indicating that women continue to seek more advanced skincare solutions ...

Suncare - China

“In 2020, COVID-19 has dragged down the fast growth that has previously shaped the China suncare market. The accumulated awareness of using sunscreens for the indoor and urban environment has resulted in minimal impact from reduced outdoor activities and mask wearing. These usage occasions, together with consumers’ sustained interest in ...

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