Beauty and Personal Care Full - China

January 2020

洗手洗浴用品 - China

“沐浴和泡澡在现代消费者日常生活中的分量日益加重。沐浴或泡澡的目的不再仅仅是清洁，而是会凭借有护肤功效的泡澡/沐浴产品成为消费者护肤流程的一部分，并且搭乘芳香疗法之势，成为一种放松和提升整体健康的方式。”

– 李玉梅，高级研究分析师

女性清洁卫生用品 - China

“精明的消费者通过对健康和养生的关注推动市场演变，并以有限的品牌忠诚度加速创新周期。研发主要集中于增加产品特质的维度，以针对不同场合和需求开发专门剪裁和设计的产品，并更好地满足消费者对自然、安全、清洁和呵护特质的具体且多样的消费升级需求。”

– 尹昱力，初级研究分析师

Feminine Hygiene and Sanitary Protection Products - China

“Savvy consumers are propelling market evolution with their attention to health and wellness and driving an expedited innovation cycle with their limited brand loyalty. R&D is primarily focused on expanding the dimensions of product features, to develop products with dedicated cuts and designs for segmented occasions and needs, and to ...

December 2019

Soap, Bath and Shower Products - China

“Showers and baths play an increasingly important role in modern consumers’ daily routines. The purpose of taking a shower or bath is moving beyond just cleaning, and is becoming part of their skincare regimen with inclusion of skincare benefits in shower/bath products, and as a means of relaxation and ...

对美容的态度- 中国 - China

“过去1年中，消费者在不同品类的美容产品和服务的使用率皆有所提升，从中可见消费者对更完美容貌的渴望和追求。医美，包括护肤服务和真正的整形手术，被视作能实际有效改善面部皮肤的方法。由于消费者越来越看重护肤和化妆的效果，并日渐更了解护肤和化妆，他们对医美的利用率预计在近期将出现增长，包括基于医美概念的产品。”

– 蒋亚利，高级研究分析师

Attitudes towards Beauty - China

“Consumers’ desire for and pursuit of a better facial appearance is reflected in their increased usage of beauty products and services across different categories over the last year. Cosmetic surgery, including both skincare services and real surgeries, is considered to offer concrete results in improving facial skin. As consumers get ...

November 2019

美容仪器 - China

婴幼儿护理用品 - China

© 2024 Mintel Group Ltd. All Rights Reserved. Confidential to Mintel.

“消费者不再将美容仪器仅视为家用版的皮肤护理或医美。如今，她们希望美容仪器能与护肤产品配套使用，构成一套全面的皮肤问题解决方案。她们非常信任美容仪器的权威认证和专业性，积极尝试先进技术和美容创新。预计在这一市场中，美容仪器、护肤产品和技术之间将进一步深入合作，提供更明显、更立竿见影的效果。”

“由于2019年新生儿数量下降，婴幼儿护理用品市场的增长多由高端品类驱动。鉴于消费者对产品有着更高的需求，并且更愿意在高品质产品上花钱，品牌可把握机遇进行高端化，并凸显成分宣称和认证，以证明安全性。虽然无伤害认证在中国市场不常见，但消费者认为该认证与安全的产品形象紧密相关，说明今后这或成为一大竞争领域。”

– 周文棋，研究分析师

October 2019

Baby Personal Care - China

“After fewer new births in 2019, the market has become driven more by the high-end of the sector. Given consumers’ higher demand for products and greater willingness to spend on high-quality products, brands need to seize the opportunity to go premium and highlight ingredient claims and certifications to prove safety ...

Beauty Devices - China

“Consumers no longer only adopt beauty devices as at-home versions of specific skin treatments or cosmetic surgeries. Nowadays, they are seeking beauty devices to cooperate with their skincare products and form an all-around solution to their skin problems. They place great trust in authentication and professionalism, and endeavouring in trying ...

September 2019

面部护肤品 - China

“面部基础护肤品的使用率比2017年时有所上升，其中洁面产品和面部防晒的使用率增幅更大。尽管这些不是精华等高价位产品，但洁面产品仍有着高端化的契机，洁面产品可提供更多高阶功效，例如为成熟女性提供抗衰老功效和为年轻女性提供舒缓功效。”

– 蒋亚利，高级研究分析师

Facial Skincare - China

“The usage rate of basic facial skincare products has increased compared to 2017, with more uptrends seen in facial cleanser and suncare products. Although they are not high-priced products like serums, premiumisation opportunities exist for facial cleanser by offering more advanced benefits like anti-aging for mature women and soothing for ...

防晒产品 - China

“防晒品市场正在飞速发展，并且消费者越来越精明，他们的需求正在从高SPF/PA系数，逐渐演变为由先进科技和高级成分带来的强效防晒效果。对于企业来说，未来的发展机遇在于：满足消费者的升级需求，需求包括宣称成分天然且容易清洁的更安全的产品；以及在提供适合不同场合的SPF/PA值之外，还能提供全面的强效防护；并开发细分产品线，以适应在任何场合随时随地的使用。”

– 尹昱力，初级研究分析师

身体护理用品 - China

“比起其他美容及个人护理品类，消费者不太认为身体护理是必需品，因此该市场依赖于产品创新，以吸取消费者的注意力，带动尝试和使用。将面部护肤品中的常见功效、成分或质地引入到身体护理中，能帮助品牌提升参与度和销售。”

Sunscreen Products - China

“The market is experiencing fast growth and consumers are becoming savvier and their needs are evolving from

© 2024 Mintel Group Ltd. All Rights Reserved. Confidential to Mintel.

high-index SPF/PA to strong protection results delivered by advanced technology and ingredients. Future opportunity lies in meeting consumers' trade-up demand for safer products boasting natural ingredients and ease of removal, offering comprehensive ...

August 2019

Bodycare - China

"Bodycare is less likely to be considered as essential when compared to other beauty and personal care categories, therefore this market relies on product innovations to draw consumer attention and drive trial and usage. Incorporating added benefits, ingredients or formats that are typically seen in facial skincare into bodycare can ...

July 2019

对抗衰老产品的态度 - China

"抗衰老只意味着30岁以上熟龄肌肤抗皱面霜的时代已一去不回。抗衰老正迅速扩大其版图以包括更广泛的目标消费者、更多元的产品宣称（如行为老化、抗氧化、抗糖化）和更多样的产品，从类医美或口服类护肤品到其他日用品，层出不穷。"

彩妆 - China

"对于30岁及以上女性的面部底妆而言，'含护肤功效'是最为重要的因素。2018年，中国市场的面部底妆新品中，'抗衰老'和'减少细纹'等宣称虽有所增长，但数量仍远低于韩国或英国，尽管过去2年有化妆习惯的30-39岁女性有明显增长。因此，将护肤功效和化妆品（尤其是粉底）相结合可成为消费者所期待的高端化潮流的助推力。"

- 尹昱力，初级研究分析师

药妆 - China

"由于国家食药监管总局的严格规定，药妆品牌无法直接从定位产品为药妆中受益，因此寻找替代的宣传方式成为刻不容缓的任务。保护肌肤屏障和解决皮肤问题都是与药妆息息相关的可行定位，并且在消费者的观念中比"适合敏感肌肤使用"宣称更为重要，后者被广泛应用，但在竞争者间大同小异。"

– 周文棋，研究分析师

June 2019

Attitudes towards Anti-aging Products - China

Colour Cosmetics - China

"When targeting a face base make-up product at women aged 30 or above, the feature 'have benefits on skin

© 2024 Mintel Group Ltd. All Rights Reserved. Confidential to Mintel.

"The days when anti-aging only referred to anti-wrinkle creams for over-30s are gone. Anti-aging is quickly expanding its territory to include a larger group of target consumers, a broader variety of claims (such as behavioural aging, anti-oxidation, anti-glycation) and diverse product offerings, from cosmetic surgery-like or ingestible skincare, to other ...

Cosmeceuticals - China

"With restrictive CFDA regulations, cosmeceutical brands are unable to benefit from directly positioning their products as cosmeceuticals, so finding alternative communication is an imperative and urgent task. Associated closely with cosmeceuticals, both skin barrier protection and skin problem solving are feasible positionings and are more important features in consumers' minds ...

appearance' is listed as the most important feature to have. In 2018, claims such as 'anti-aging' and 'reduce fine lines' appeared in more new launches in China but still significantly less ...

May 2019

面膜- 中国 - China

"面膜市场增长迅速，竞争激烈，从功能性到附加情感益处均暗流涌动。消费者的情感放松需求升级，为品牌提供了开发仪式化面膜护理流程的机会。在高端化趋势的影响下，品牌可以围绕敏感肌展开产品创新，如医用面膜。"

– 周文棋，研究分析师

香水 - China

"随着中国美容消费者越来越向线上转移，香水品牌和零售商也有必要扩张数字版图。但是，数字化并不仅仅意味着进驻电商或开设社交媒体账号；在香水品类，重要的是如何在数字空间引发气味联想、提供感官体验，并最终帮助消费者找到合适的那款香。"

– 李玉梅，高级研究分析师

April 2019

Facial Masks - China

"As a fast-growing market, the facial mask market is facing fierce competition from functional aspects to value-added emotional aspects. Consumers' upgraded demands for mental relaxation provide an opportunity for brands to invest in a ritualised facial mask routine. Under the influence of the premiumisation trend, product innovation could be around ...

Fragrances - China

"With Chinese beauty consumers increasingly shifting to online, it is also becoming crucial for fragrance brands and retailers to expand their digital presence. However, digitalisation doesn't just mean selling products online or opening social media accounts; in the fragrance category, what's more important is how to evoke the sense of ...

口腔清洁- 中国 - China

"高端化趋势继续对口腔清洁市场产生影响。在产品使用与知识积累方面，消费者的口腔健康意识不断提升。电动口腔护理产品不仅带来更先进的功能性效果，还与提高生活质量有关。中草药牙膏品牌应继续在中草药成分上面下功夫，特别是名贵中草药成分，以证明它们对缓解口腔问

© 2024 Mintel Group Ltd. All Rights Reserved. Confidential to Mintel.

题有效果。”

– 周文棋，研究分析师

March 2019

Oral Hygiene - China

“The premiumisation trend continues to influence the oral hygiene market with consumers’ awareness of oral health in terms of both product usage and knowledge accumulation sides. Electric oral care products not only bring more advanced functional results, but also an association with better life quality. TCM toothpaste brands should keep ...

造型和染发用品 - China

“国际品牌仍占主导，但本土品牌开始通过线上平台兴起并获得关注。消费者追求产品的安全和健康，因此品牌纷纷加码对天然成分市场教育的竞争。无论是在产品形态还是使用目的方面，一次性美发产品都应搭乘美妆市场的趋势。”

洗发护发产品 - China

“要区别于发膜等其他头发护理产品，免洗护发精油不能局限于修复功能。免洗护发精油可以利用其使用方便快捷的优势，来扩展使用场合，宣传更多高阶功效，比如在外出时维持头发造型和紫外线防护。”

Haircare - China

"The haircare category in China, though becoming more saturated in terms of penetration, has maintained steady growth in recent years, mainly driven by strong new product launch activities that keep consumers engaged and drive trading up. While consumers’ top hair concerns and needs remain unchanged, eg anti-dandruff, there is a ...

February 2019

Hair Colourants and Styling Products - China

“While international brands still dominate, local brands have started to emerge and gain attention through online platforms. Consumers’ demand for safety and health has given rise to competition based on education around natural ingredients. Temporary hair beauty products should leverage trends in the colour cosmetics market, both in terms of ...

© 2024 Mintel Group Ltd. All Rights Reserved. Confidential to Mintel.