January 2019

洗手洗浴用品 - China

"普通沐浴露仍然主导市场，男性在使用专用沐浴露方面仍处于初期阶段。市场未来的竞争将围绕香味和附加值功效，如感官体验。线下渠道值得品牌加码，特别是美容产品垂直渠道。"

December 2018

Soap, Bath and Shower Products - China

“Unisex shower gel still dominates the market and men are at the early stage to use male-specialised shower products. Further competition lies in fragrance and value-added functions such as sensory experience. Offline channels, especially beauty vertical channels should be invested in.”

– Vicky Zhou, Research Analyst

保健品 - China

“父母有意为孩子购买保健品，特别是益生菌保健品。品牌需要打造一个专业和国际的品牌形象以赢取消费者的信任，特别是随着保健品电子商务的影响。为了吸引消费者，扩大产品选择和加大创新也必不可少。”

November 2018

Health Supplements - China

“Parents have the intention to purchase health supplements for their children, especially probiotic supplements. Brands should develop a professional and international brand image to earn consumers’ trust, particularly since e-commerce is emerging. Enhancing product options and innovations is also important to attract consumers.”

– Vicky Zhou, Research Analyst

防晒和抗污染产品 - China

“防晒产品市场普遍饱和，较高的使用频率是带动该市场增长的驱动力。防晒产品与抗衰老的联系密切，这促使三分之一的被访者全年使用防晒产品以应对肌肤老化问题。多数被访城市消费者认识到了使用抗污染产品的必要性，但缺少相关知识来判断产品是否有效。因此，品牌可更进一步从强调预防的角度切入，推广抗污染产品。”

– 金乔颖，研究副总监

October 2018

Suncare and Pollution Protection Products - China

“Higher usage frequency is driving the sunscreen market to grow after the category is widely penetrated, thanks to its association with anti-aging that has encouraged a third of respondents to use it all year round to fight against aging skin. The prevention mindset can also be enhanced in the delivery ...

婴幼儿护理用品 - China

“婴幼儿数量增多以及产品使用频率提高将推动市场增长。但由于缺乏消费者教育和品牌差异，消费者往往会感到无从下手。家长最关注婴幼儿的使用感受和皮肤问题；证明安全性始终是品牌的任务重心。”

– 周文棋，研究分析师

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男性美容护理流程 - China

“男性面部护肤品市场年同比增长稳定，因为外貌保养的重要性得到了男性的广泛认可。但由于男性整体上产品使用频率低，护肤流程简单，品牌首先需要做出更多努力帮助男性建立日常的护肤流程，增加核心产品的使用频率，然后再推出更小众的男性产品，比如化妆品。”

– 李玉梅，高级研究分析师

September 2018

Baby Personal Care - China

“The increasing baby population and more frequent usage will fuel the market growth. However, lack of consumer education and brand differentiation leads to consumer confusion. Babies’ feelings and skin issues matter most to parents, and proving safety is always the priority for brands.”

– Vicky Zhou, Research Analyst

Men’s Beauty and Grooming Routines - China

"The men’s facial skincare market achieved stable year-on-year value growth as the importance of appearance maintenance is widely acknowledged among men. But given men’s overall low usage frequency and simple routines, brands need to make more efforts to help men establish regular skincare routines and drive usage frequency of core ...

女性美容护理流程 - China

“中国女性在面部护肤品上的投资意愿日益增强，这促使她们换用更高价的品牌，加入更多的护肤步骤，特别是之前的小众品类。下一步可以是基于季节、皮肤状况或日夜场合扩充更多的细分护肤品，从而刺激体验试用和多种类产品使用。”

– 李玉梅，高级研究分析师

August 2018

Women's Beauty and Grooming Routines - China

“Chinese women are increasingly willing to invest in facial skincare, leading them to switch to higher-priced brands and adopt more steps into their routines, especially previously niche categories. The next steps could be expanding more segmented skincare products depending on the season, skin conditions, or used in the daytime and ...

July 2018

彩妆-眼部和眉部 - China

彩妆-面部 - China

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" 眼眉部彩妆通常更不容易化，需要更高的化妆技巧以打造精致的妆容，显示出方便易用的产品特征在该品类的新品开发中的重要性。未来几年，眼影的增长潜力最强劲，动力来自消费者日渐增长的兴趣、美妆博主引领的彩妆趋势，以及强劲的新品发布。"

– 李玉梅，高级研究分析师

" 由于消费者不再如2017年时那样仅追求裸妆妆效，因此消费者虽然仍然高度重视底妆产品，但是焦点却稍微转移至重点部位彩妆产品。因为消费者使用彩妆产品的需求和信心日益增高，在每一个彩妆步骤使用相对应的产品打造精致妆容成为了2018年的新趋势，这也显现出腮红在近期的发展潜力。“

June 2018

Colour Cosmetics - Eye and Eyebrow - China

“Eye and eyebrow colour cosmetics are usually harder to apply and require more make-up techniques to create a delicate look, highlighting the importance of NPD (New product development) in easy-to-use products in this category. Eyeshadow holds the greatest growth potential in the next few years, supported by consumers’ growing interests ...

Colour Cosmetics - Face - China

“Consumers still value highly base make-up products, but focus has slightly moved to point make-up products as they are not only calling for nude look now as much as they were in 2017. The new trend found in 2018 is to achieve a delicate finish by using corresponding products for ...

婴幼儿纸尿裤 - China

" 消费升级进一步推动了市场增长，而关税下降将为国际品牌带来商机，同时威胁国产品牌。爸爸们与妈妈们在选择纸尿裤上的相似度，显示品牌有机会让爸爸参与纸尿裤的购买过程。持续投资开发优质产品并提供周到服务，将成为品牌留住消费者的关键之举。"

– 周文棋，研究分析师

彩妆-唇部 - China

" 就唇部彩妆而言，中国消费者（尤以年轻女性为主）更受流行趋势而非产品创新吸引。过去几年，消费者为跟上变化的流行趋势，不断加快购买周期，持续推动市场的强劲增势。但是，有更多熟悉唇部彩妆的消费者（如英敏特城市精英人群）发展出对真正创新产品的强烈需求，而非只为追逐新色号而已，如此显示产品创新对这一品类长期发展的重要性。 "

– 李玉梅，高级研究分析师

May 2018

Nappies - China

“Consumption premiumisation has further fuelled the market growth and tariff reduction will bring opportunities to international brands and also threat domestic brands. The agreement on nappy choices of mums and dads shows a chance to involve dads into purchasing nappy. Keep investing in high quality products and providing thoughtful service ...

Colour Cosmetics - Lip - China

“When it comes to lip colour cosmetics, Chinese consumers, especially young women, are more trend-driven instead of innovation-driven. In the past few years, they have kept speeding up their purchase cycle to follow the evolving trends, which keeps the strong growth going. However, more sophisticated consumers, such as Mintropolitans, have ...

面膜 - China

" 男性消费者将成为面膜市场新增长点。品牌拉升使用频率为市场增长的主要驱动力。未来市场的发展关键在于产品创新及成分教育，同时还需关注空气污染等造成肌肤问

对高端面部护肤品的态度 - China

" 想要‘达到更好的功效’是驱动消费者使用高端品牌的主要原因，显示出这一点应该为品牌发展、沟通的核心。特别是当今消费者眼前有更多选项可以达到有效的成果——

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题的元凶。 "

– ——周文棋，研究分析师

她们可以付出高价购买高端产品，也可以寻求美容仪器等先进技术的协助。 "

– 金乔颖，研究副总监

April 2018

Facial Masks - China

"Male consumers will be a new growth point for the facial mask market. Brands encouraging usage frequency is the main driver of market growth. The future market is about product innovation and ingredient education, while paying attention to the causation of skin problems such as air pollution."

– Vicky ...

Attitudes towards Prestige Facial Skincare Products - China

"Seeking better results is the key motivator that drives consumers to use prestige brands, highlighting it being the core area to develop and communicate. Especially given that consumers are offered more options to struggle with when pursuing effectiveness – trade up to premium products or seek help from advanced technology ...

口腔清洁 - China

"技术、产品宣称和包装创新都带动了成熟市场和以电动牙刷和抗过敏牙膏为代表的新型产品市场的持续发展；新型产品以电动牙刷和抗过敏牙膏为代表。狮王和花王等小众品牌的效果突出，竞争力与日俱增，为大品牌带来了挑战。"

March 2018

Oral Hygiene - China

"Innovation in technology, product claims and packaging is driving both mature and newer product types such as electric toothbrushes and toothpaste for sensitive teeth, to continuously grow. Niche brands like Lion and Kao become more competitive and are posing challenges to big players by impressing consumers with good results." ...

皮肤管理 - China

" 轻微的皮肤状况对中国消费者而言似乎无关紧要。大多数人不会采用专门的产品或药品来处理皮肤问题。为扩大消费者基数及使用频率，药妆产品可以定位为维持肌肤健康的全面性产品，又或是针对不良生活方式（如高压生活、睡眠不足等）等造成肌肤问题的主因。 "

美容零售 - China

"提供定制款产品被视为大势所趋，尤其值得实体店留意。此举可以帮助实体店赢回流失的客户，打造不同于线上渠道的差异优势。除了价格战外，在线渠道还应该利用AR（增强现实）试妆等新科技带来更便捷的购物流程。"

– 金乔颖，研究副总监

February 2018

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Managing Skin Conditions - China

“Minor skin conditions seem to be no big deal for Chinese consumers. The majority of them don’t bother to use specialised products or take medicines to treat their skin conditions. In order to broaden consumer base and usage frequencies, cosmeceuticals need to promote more preventative usage by positioning as a ...

洗发护发产品 - China

＂洗发水和护发素的高端化其实为头发护理产品的发展带来威胁。市场上带有进阶宣称如头皮护理、滋养、香熏疗法等的洗发水有增无减，消费者可能也就不觉得需要再使用额外产品。品牌需要赋予头发护理产品更独特的价值主张，例如利用沙龙或护肤概念所带来的感官体验，或与特定使用时机做连结，像是可于吹干头发前使用，好让消费者觉得该产品有使用必要。＂

– 李玉梅，研究分析师

January 2018

Haircare - China

“The premiumisation of shampoos and conditioners actually poses threats to the development of hair treatment products. With more and more shampoos including advanced claims such as scalp care, nourishing or aromatherapy, consumers may feel no need to employ extra products. Brands need to make more efforts to give hair treatment ...

Beauty Retailing - China

“Providing personalised designed products is perceived as an upcoming trend, and is especially an area needing most attention in bricks-and-mortar stores. This approach can help to win back lapsed offline buyers and differentiate from online offerings. Online channels should explore beyond price competition by incorporating new techniques such as AR ...

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