August 2021

彩妆——眼部和眉部 - China

“女性对美的兴趣、她们不断发展变化的妆容，以及本土品牌的崛起，共同促进中国眼部和眉部彩妆市场繁荣。然而，相比面部和唇部化妆品，该品类吸引的消费者预算较少。此外，有限的定价区间和白炽化竞争促使品牌寻找新视角和新领域以求增长。未来机会在于填补眼周安全方面的差异化空白，以及对单色眼影等尚未同质化的小单品在颜色方面进行有趣的沟通宣传。”

– 尹昱力，研究分析师

彩妆——面部 - China

“在面部彩妆市场，消费者的关注点主要集中在基本品类，尤其是粉底，很少增加化妆流程或更换品牌。该市场的下一个增长机遇存在于护肤型面部彩妆之中。一方面，品牌可解决当前消费者在使用底妆产品方面的痛点，比如凭借保湿功效解决不贴合皮肤、容易卡粉的问题；另一方面，也符合消费者对皮肤健康日益增长的关注。”

– 柴静彦，研究分析师

July 2021

彩妆——唇部 - China

“由于唇部彩妆市场已饱和，该市场的增长主要得益于每位消费者的花费及其使用产品数量的增长，而并不来源于新用户。因此，品牌有必要推出唇泥等创新的产品形态和质地，从而带来更好的使用体验。此外，一些消费者担心戴口罩容易让唇妆脱色，能满足持久与补水需求的品牌或将重新赢得其青睐。”

– 靳尧婷，研究分析师

香水 - China

“香水不再是一种单纯的嗅觉体验。随着香水的发现和购买路径迁移至线上，品牌需要调动尽可能多的感官，鼓励消费者使用视觉和听觉等其他感官欣赏香水。此外，尽管香水一向迎合消费者的情感需求，但其产品沟通需要像其他美妆品类一样，更以事实为基础，涵盖和强调令消费者对产品安全放心的成分。”

– 李玉梅，副总监

Colour Cosmetics - Face - China

“In the face colour cosmetics market, consumers focus on staple products, especially foundation, and are hardly expanding their routines or switching brands. The next growth opportunity lies in makeup products with skincare benefits, on one hand addressing consumers’ current pain points of wearing base makeup products, such as moisturising for ...

Colour Cosmetics - Eye and Eyebrow - China

“Females’ interest in beauty, their evolving makeup looks, and the emerging of domestic brands have together helped China’s eye and eyebrow colour cosmetics market prosper. But the category draws a smaller budget from consumers compared to face and lip makeups. Moreover, the limited price range in which brands compete and ...

Colour Cosmetics - Lip - China

“The growth of the lip colour cosmetics market is mainly driven by increased spending and frequency on quantity per person instead of recruiting new users since the market is already saturated, therefore innovations on new format and texture such as mud lip makeups that create better usage experiences are important ...

皮肤管理 - China

“新冠疫情爆发后人们对健康的关注与日俱增，为专业针对皮肤问题的护肤品牌带来商机。然而，随着更多品牌的加入，竞争也愈发激烈。想要在竞争中更胜一筹，专业针对皮肤问题的护肤品牌应当充分利用其更高的消费者粘度，提供更多增值服务，化身消费者日常生活中专业且值得信赖的伙伴。此外，开发更多功效的产品、抓住逐渐觉醒的男性消费者也同样重要。”

– 柴静彦，研究分析师

June 2021

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Beauty and Personal Care - China

Fragrances - China

“Fragrance is no longer a purely olfactory experience. With the discovery and purchase of fragrances moving online, brands need to engage as many senses as possible, encouraging consumers to use other senses such as sight and hearing to appreciate fragrances. Moreover, while fragrances always appeal emotionally to consumers, product communication ...

Managing Skin Conditions - China

“The rising concern on health and wellbeing after the COVID-19 outbreak has brought opportunities for speciality skincare brands. However, the competition is also getting fiercer as newcomers join. To outperform the competition, speciality skincare brands should leverage the high consumer stickiness and provide more value-added services to become professional and ...

面膜 - China

“受新冠疫情影响，2020年面膜品类渗透率持续饱和，开始进入放缓的增长阶段。贴片式面膜因其便捷性过去一直深受消费者青睐。但如今的消费者开始寻求除补水保湿功能外的更高阶护肤功效，水洗涂抹式面膜的人气也较之前相应提高。目前，中国面膜市场正处于形态变化的拐点。短期内，将更高阶护肤功效搭配合适的面膜形态，有助于吸引消费。”

– 尹昱力，研究分析师

May 2021

Facial Masks - China

“The facial mask category is entering a more moderate growth stage with penetration levels continued saturating in 2020, as a result of the breakout of COVID-19. Sheet masks were a favourite for consumers because of their convenience in the past, but now along with consumers’ interests in trading up to ...

对高端美容产品的态度 - China

“精华乳和精华液仍然是高端细分中最热门的护肤品类，同时抗衰老相关宣称是消费者的主要诉求。中国的女性消费者继续追求能满足其对护肤解决方案的高需求的产品，并愿意升级购买能提供高阶性能的产品。吸引人的品牌故事、可被证实的有效性以及提供情感价值是提高消费者粘性的关键。未来，侧重于成分和质地并带有可持续宣称的产品值得品牌研发，因为消费者变得愈发精明成熟，并对品牌证明其溢价有更高要求。”

– 靳尧婷，研究分析师

美容零售 - China

“新冠疫情爆发后，消费者不断转向线上，但对线上和线下渠道产品质量和价格的认知存在差异明显。实体店需要提供指导和体验式的产品服务，与消费者建立紧密联系；线上平台则需要联手品牌活动，成为品牌的合作伙伴。直播电商的发展应有助于线上渠道突破仅凭竞争性价格立足的僵局，开创品牌认可的新格局。”

– 周文棋，研究分析师

抗衰老产品 - China

“中国女性仍然追求更年轻的容貌，改善皮肤松弛和皱纹等明显的肌肤衰老迹象依然是其首要需求。同时，消费者对衰老的看法以及应对衰老问题的方法更趋多样化。如今，消费者在应对肌肤问题时，开始将目光投向护肤品以外的解决方案。在这一趋势下，头发和头皮的衰老以及心理健康将成为未来几年的重要话题。抗衰老产品需要成为消费者日常健康流程的一部分，并与她们的生活方式和生活环境产生协同效应。”

– 李玉梅，副总监

Attitudes towards Prestige BPC Products - China

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"Serum and essence products are still the most popular skincare category in the prestige sector and the main pursuit is anti-aging related claims. Chinese female consumers continue to seek products that satisfy their high demands for skin solutions and are willing to trade up for products that offer advanced performance ...

April 2021

Beauty Retailing - China

"Consumers are continuously shifting towards online in the wake of COVID-19, but the differential in the perceived quality of products and prices between online and offline channels are marked. Physical stores need an educational and experiential offering to connect with consumers, while online platforms need to team up with brand ...

Age Management Products - China

"As Chinese women still have a strong desire to look younger, improving visible signs of skin aging, such as loose skin and wrinkles, remains a primary consumer demand. Meanwhile, how consumers perceive aging and tackle aging problems is becoming more inclusive. With consumers looking beyond skincare products when treating skin ...

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