

## September 2023

### 男性美容护理流程 - China

“能轻易提升颜值或个人魅力的产品仍然深受男性消费者的青睐，如头发造型产品和香水，而面部护肤品的使用渗透率和使用频率较低。但经过不断的市场教育，并且积累了一定的护肤知识后，男性开始逐渐养成查看成分和购买高功效产品的习惯。因此，他们愿意与配偶分享使用护肤品，并偏好男性特质较弱的品牌。这些事实表明，男性需求分散化，消费者倾向于选择可自选产品组合及针对不同肤质的产品，品牌有必要弱化男士专用的定位，满足男性真正的护肤需求，而不是仅将男性作为单独的群体来对待。”

— 柴静彦，高级研究分析师

## August 2023

### 彩妆——面部 - China

“品牌可以通过解决敏感肌的皮肤问题，开发适合敏感肤质的面部彩妆，从而提高面部彩妆的增长曲线。此外，妆前乳/隔离霜可以通过升级护肤功效来增强其重要性，而修容产品则可以降低使用门槛以获得更多受众。”

何雨婷，研究分析师

## June 2023

### 对高端美容产品的态度 - China

“极高安全性是高端护肤品牌的首要价值，品牌必须为不断进阶的功效提供安全保障。国产高端品牌可以利用本土属性（如成分、概念、品牌视觉、身心疗愈项目）与成熟的外国品牌竞争，并专注于提高品牌知名度和巩固产品功效。”

— 何雨婷，研究分析师

## May 2023

### Attitudes Towards Prestige BPC Products - China

### Men's Grooming Routines - China

“Products that can easily uplift appearance or charisma like hairstyling products and perfume still obtained men's majority affinity while leaving facial skincare products with lower usage penetration and usage frequency. But the continuous market cultivation and accumulated skincare knowledge have gradually allowed them to build up a habit of checking ...

### Colour Cosmetics - Face - China

“Developing face makeup for sensitive skin by addressing their skin issues can elevate the growth curve of face colour cosmetics. Besides, primer products can enhance their presence by upgrading skincare benefits, and contouring products can gain larger audiences by downgrading entry barriers.”

— Tina He, Research Analyst

### Attitudes Towards Skin Tone Management Products - China

“Despite tightened regulation of whitening efficacy claims, skin tone management will still be an extremely important functional pillar among all, given consumers' strong need and diverse ways of problem-solving. On the other hand, as competition around ingredients and efficacies intensifies in the facial skincare sector, brands will need to seek ...

### 面膜 - China

“为了鼓励消费者尝试面膜产品，品牌需要围绕产品的肤感讲好故事，既可以从产品质地和膜布材质入手，也可以

## Beauty and Personal Care - China

"Ultra safety is the foremost value of prestige skincare brands, which must safeguard the on-going advancement of efficacies. Domestic prestige brands can leverage the locality (eg ingredients, concepts, visuals, well-being programs) to compete with established foreign players, focusing on promoting brand awareness and consolidating product efficacies."

从创新的产品形态入手。此外，敏感肌消费者是面膜品类中极具潜力的消费群体。品牌需迎合他们的需求，打造专业、高端的形象，以保持竞争力。”

— 柴静彦，高级研究分析师

### 抗衰老产品 - China

“消费者正采取各种解决方案来对抗衰老，但面部护肤品仍是最主流的抗衰老对策，其地位没有被美容仪器和美容保健品过多蚕食。然而，品牌仍需要仔细考虑升级有效、不刺激的成分以迎合不同皮肤状况的消费者，并在产品形态和质地上创新，以维持消费者的兴趣。此外，随着消费者采取全方位抗衰老方案来维持年轻外表，抗衰老概念不仅局限于面部肌肤，也正扩展至身体肌肤和头皮。”

### Age Management Products - China

“Consumers are adopting a variety of solutions to deal with ageing, but facial skincare products remain the most mainstream cure without much cannibalisation from the usage of beauty devices and beauty supplements. Still, upgrading on effective and non-irritating ingredients to cater to different skin conditions and innovations on product format ...

— 靳尧婷，高级研究分析师

### Facial Masks - China

“To trigger trials for facial masks, brands need to deliver a good story around the skin sensation of their products, either by leveraging product texture and sheet materials or by developing innovative product formats. Moreover, sensitive skin consumers demonstrate great potential in the facial mask category. Brands must consider their ...

## April 2023

### 口腔护理 - China

“虽然受到新冠疫情影响，但口腔健康意识的提高仍推动了市场增长，并将在未来继续驱动增长。品牌和制造商可以利用新颖的口味提高小众产品的使用率，以增加营收。此外，开发专业产品可以赢得口腔护理知识丰富的消费者的青睐，如建立医学背景、针对特定问题（如牙齿变黄）或特定群体（如正畸人群）。”

### 洗发护发产品 - China

“消费者投资洗发护发产品的意愿强，且对头皮健康的意识有所提升，二者将继续驱动中国洗发护发产品市场的发展。品牌可利用护肤成分和理念推出高端产品，从而迎合消费者的需求。此外，敏感头皮护理产品将成为主流，并

— 何雨婷，研究分析师

## March 2023

### Oral Care - China

“Rising awareness of oral health propelled market growth despite the pandemic, and will continue to drive it in the future. Brands and manufacturers can expand the usage of currently niche products through novel

## Beauty and Personal Care - China

flavours to increase revenue. Moreover, developing professional products can win the affinity of more knowledgeable consumers, such ...

### 美容零售 - China

“尽管2022年出现了严峻挑战，但是在疫情防控政策放宽的情况下，消费者有望购买更多美容及个人护理产品且恢复实体店购物。随着消费者减少冲动消费，并且更多受品质和体验所驱动，线上和线下渠道有必要采用多种策略，并提供高品质体验吸引消费者，为其提供合理的购买理由。品牌也需在不同触点上展现更大的诚意，以便与消费者建立起健康长久的关系。”

—— 古丹阳，高级研究分析师

延伸至洗发水或护发素以外的其他细分子品类。”

—— 柴静彦，高级研究分析师

### 造型和染发用品 - China

“虽然新冠疫情导致美发产品市场增长放缓，但当生活恢复正常时，消费者将重燃对美发热情。家用染发产品领域将需要继续开发可行的创新解决方案，凭借方便和灵活优势与线下美发店竞争。家用头发造型产品必须着力于满足消费者的首要使用目的，即健康的头发外观，不过该品类也有望进一步模糊与护发品类的界限。”

—— 靳尧婷，高级研究分析师

## February 2023

### Haircare - China

“Consumers’ high willingness to invest in haircare and their increasing awareness of scalp health will continue to drive the development of China’s haircare market. Brands can cater to consumer needs with prestige offerings leveraging skincare ingredients and concepts. Moreover, sensitive scalp care will become mainstream and expand into more sub-categories ...

### Beauty Retailing - China

“Despite tough challenges in 2022, the lifting of the COVID-19 prevention and control policies will see consumers purchasing more BPC products and returning to physical stores. With spending sentiment becoming less impulsive and more driven by quality and experience, it will be important for both online and offline channels to ...

### Hair Colourants and Styling Products - China

“Although the pandemic has slowed down the growth of the hair beauty market, consumers’ enthusiasm for hair beauty will continue when life goes back to normal. At-home hair colourant products will need to continue to innovate on feasible solutions that leverage their merit of convenience and flexibility to compete with ...

## January 1970

### 对肤色管理产品的态度 - China

“尽管美白功效宣称受到更严格的监管，但由于消费者需求强烈，并且解决问题的方式多种多样，肤色管理仍将是所有热门功效中至关重要的一项。另一方面，随着面部护肤领域围绕成分和功效的竞争加剧，品牌需要通过出色的故事讲述和沟通实现突破，同时在抗污染/蓝光等新的小众细分领域或面部底妆等相邻品类寻找机会。”

—— 蒋亚利，美容个护品类副总监

## Upcoming Reports

**Attitude Towards Edible Beauty -  
China - 2023**

**Bodycare - China - 2023**

婴幼儿护理用品 - 中国 - 2023年

身体护理用品 - 中国 - 2023年

**Beauty Devices - China - 2023**

**Women's Facial Skincare - China -  
2023**

洗手洗浴用品 - 中国 - 2023年

**Facial Cleansing and Makeup  
Removal Products - China - 2023**

**Baby Personal Care - China - 2023**

**Suncare - China - 2023**

对口服美容的态度 - 中国 - 2023年

防晒产品 - 中国 - 2023年

**Soap, Bath and Shower Products -  
China - 2023**

女士面部护肤品 - 中国 - 2023年

美容仪器 - 中国 - 2023年

面部清洁和卸妆产品 - 中国 - 2023年