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

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

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 ...

防晒产品 - China

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“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

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

女士面部护肤品 - China

“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

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 ...

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 ...

身体护理用品 - China

Bodycare - China

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Beauty and Personal Care - China

“其他美容与个人护理品类的产品视觉效果更重要。而身体护理产品与此不同，非常依赖个人使用感受。因此，推出让消费者有良好皮肤感受的产品至关重要。沐浴产品与身体护理产品有相似的润肤功效，两者竞争激烈。身体护理产品品类需注重创新，提供沐浴产品品类很难达到的额外功效，如美白和抗衰老，并且借用面部护肤潮流中的明星成分和概念，满足消费者的精细需求。”

– 靳尧婷，研究分析师

“Unlike other BPC categories where visuals are more important, bodycare relies strongly on personal usage feelings, which is why launching products that reassure consumers of a good skin feel is essential. Facing fierce competition from shower products that can deliver similar skin benefits of moisturising, the bodycare category needs to ...

September 2020

彩妆 - China

“由于新冠疫情期间彩妆使用需求更少，彩妆消费暂时停滞。但是，得益于消费者对美的刚需，以及长期内对此的广泛热忱，彩妆市场仍能迅速恢复。品牌要抓住机遇，需以加强的视觉和情感吸引力来打造产品，鼓励购买；扩大产品对不同年龄群体的适用性，并激发创造力；打造适用于消费者的使用场景的产品；以及通过全渠道推出符合消费者需求的产品与服务，从而提升品牌吸引力和消费者忠实度。”

– 尹昱力，研究分析师

August 2020

Colour Cosmetics - China

“COVID-19 put a temporary stop on the colour cosmetics consumption due to less usage needs during outbreak. However, the market remains resilient thanks to consumers’ rigid beauty demand and widely spread enthusiasm in the long term. Opportunities lie for those brands which could build products with enhanced visual and emotional ...

皮肤管理 (应对新冠疫情之后) - China

“新冠疫情爆发后，出门戴口罩已成为消费者的日常习惯。英敏特研究显示，除了常见的粉刺和毛孔粗大等皮肤状况之外，戴口罩的习惯诱发了更多皮肤问题，例如皮肤干燥发痒。这意味着品牌有机会更专注于天然成分和被证实的功效，以满足消费者在疫情后的需求。”

抗衰老产品 (应对新冠疫情之后) - China

“成熟女性消费者基数庞大，更好地满足30岁以上女性消费者的需求是市场机遇所在。品牌要想在市场竞争中凭借差异化脱颖而出，不仅可凭借显著的产品功效，也可通过支持成熟女性的生活方式，并关爱其情感需求。年轻消费者（尤其是18-24岁的消费者）使用抗衰老产品主要是为了预防而非解决衰老问题。该群体的财务信心受新冠疫情的冲击最大，因此有可能会推迟消费抗衰老产品的步伐。”

– 蒋亚利，高级研究分析师，2020年5月29日

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July 2020

香水 (应对新冠疫情之后) - China

“未来几年，国外大品牌在中国香水市场的主导地位将受到挑战。随着消费者日渐偏爱独特、不常见的香味，如今他们正将目光投向大品牌的经典香水之外。在消费者看来，国际知名奢侈品牌的香水除了高级以外，几乎不太具备其他正面特质，而小众香水品牌则有趣、有创意且独特有个性。

此外，新冠疫情的爆发促进了中国本土化日渐发展，消费者越来越支持本土品牌以及中式生活方式和价值观。如今，本土品牌拥有得天独厚的优势，利用中国传统引起消费者共鸣；而国外品牌将更难单纯凭借自己的国际化“出身”来打造令人向往的形象。”

– 李玉梅，高级研究分析师，2020年5月31日

Managing Skin Conditions (Responding to COVID-19) - China

“Wearing a face mask outdoors has become a daily habit for consumers after the outbreak. Mintel’s research has shown that this has led to more skin issues such as dry/itchy skin, on top of common skin conditions such as acne and enlarged pores. This means an opportunity for brands ...

Age Management Products (Responding to COVID-19) - China

“The large population of mature women means there are opportunities to better serve women over 30. This means brands can differentiate not only by extraordinary product performance but also by supporting mature women’s lifestyles and taking care of their emotional needs. While young consumers, especially the 18-24s, whose financial confidence ...

Fragrances (Responding to COVID-19) - China

“The dominance of big foreign brands in the Chinese fragrance market will be challenged in the coming years. With a growing appetite for rare and unusual scents, today’s consumers are looking beyond big brands’ classic fragrances. In their perceptions, fragrances from international well-known luxury brands are hardly associated with positive ...

对高端美容产品的态度 (应对新冠疫情之后) - China

“‘有资深研发人员研发’和‘使用先进的加工技术’的科学因素是与高端品牌形象关联最密切的特性，因此加强创新是赢得消费者可支配支出的关键。英敏特预测，有证书和证明背书的临床试验将进一步拉动信心。高端品牌拓宽线上曝光的同时，其训练有素的顾问的专业知识是另一个构建信心的因素，这能锁定对经济有保障/追求上进的消费者的进一步销售。英敏特趋势《智慧美容》（Beauty with a Brain）展现了科学研究的益处，并且这一益处能通过训练有素的销售顾问团队强化——线上线下双管齐下鼓励消费者参与并留住消费者。”

– 靳尧婷，研究分析师，2020年4月30日

June 2020

面膜 (应对新冠疫情之后) - China

“新冠疫情爆发之前，面膜市场的激烈竞争导致了宣传成本不断增加并且同质化现象愈发严重。如今的机遇在于：

Attitudes towards Prestige BPC Products (Responding to COVID-19) - China

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开展探索创新以解决新生活方式（如在公共场合佩戴口罩）引发的皮肤问题；推出针对25岁以上女性的抗衰老面膜，以实现高端化；通过更注重保护肌肤屏障和进一步细分小众场景以提高女性用户的使用频率；以及，投资市场教育以提高面膜在男性中的渗透率。”

– 尹昱力，初级研究分析师，2020年4月30日

[graphic:]

May 2020

Facial Masks (Responding to COVID-19) - China

“Fierce competition in the facial masks market before COVID-19 has resulted in increasing communication costs and homogenisation. Opportunities now lie in exploring innovations to tackle skin issues triggered by new lifestyles (eg wearing face masks when in public) after COVID-19 outbreak, premiumisation via anti-aging facial masks targeting women aged above ...

April 2020

口腔护理 - China

“逾半数消费者热衷于使用牙龈护理和抗敏感牙膏，即使他们没有遇到相关的口腔问题。这意味着预防胜于治疗的理念已牢牢占领心智，并可扩展到其他功效上，如美白、预防牙结石和维持口腔菌群平衡等。”

– 尹昱力，初级研究分析师

March 2020

Oral Care - China

“Over half of consumers are keen on using gum caring and anti-sensitivity toothpastes even if they haven’t experienced related dental problems. This makes the idea of prevention over treatment solid and could be expanded into other functions, such as whitening, preventing calculus, and maintaining a balanced oral microbiome.”

– ...

美容零售 - China

“实体店不再仅仅是售卖产品的场所，而且是为消费者创造体验的地方，其重点不仅仅在于以具有竞争力的价格出售产品，与线上渠道竞争，而且应转向打造具有记忆点的体验，提供专业建议，最重要的是为消费者设计接触新品的氛围，打造舒适的产品试用环境。”

February 2020

Beauty Retailing - China

造型和染发用品 - China

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"Bricks-and-mortar stores are no longer just a place to sell products but also a destination to create experiences for consumers, the focus should not only be selling products with price competition with online channels, but shift to create memorable experiences, to provide expert advice and the most importantly is to ...

洗发护发产品 - China

"过去一年，消费者的头发和头皮护理意识均有提升，但防脱发和增加发量尚未真正崛起，因为消费者的注意力更多集中在明显的头发问题上，比如干枯和分叉。但25-29岁消费者比年长的消费者更为担心发量问题，说明增加发量的产品在年轻消费者中大有潜力。不健康的生活方式、压力/抑郁和污染是脱发的元凶，这表明在营销中可运用这些因素以获得消费者共鸣。"

"在消费者心中，染发产品是为了彰显时尚，而不是为了遮盖白发。对流行发色的广泛热情说明，品牌需要通过营销沟通转换产品形象，以更时尚的方式展示产品，吸引消费者。"

– 尹昱力，初级研究分析师

Haircare - China

"Consumers' awareness of hair and scalp care both increased in the last year, though anti-hair loss and hair volumising are yet to take off, as consumers' attention is more focused on obvious hair issues like split ends and dryness. But 25-29 year olds are worrying about hair volume more than ...

January 2020

Hair Colourants and Styling Products - China

"Hair colourants, in consumers' minds, work as a display of fashion, rather than serving as a cover for aged grey hair. The widely held keenness towards trendy hair colours implies that brands need to alter their product images via marketing communications to present in a more fashionable way to attract ...

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