

December 2021

洗手洗浴用品 - China

“洗浴不再仅仅是专注于个人卫生清洁的功能性品类。如今的消费者在浴室里进行从护肤到娱乐的各种活动，并通过淋浴和泡澡达到舒缓放松和自我享受的目的。因此，洗浴用品需要提供更多情感价值以帮助消费者享受他们的日常流程，利用香型和质地提升情绪，利用吸睛的外观传递仪式感，并打造更加以生活方式为导向的品牌形象。”

——柴静彦，研究分析师

November 2021

对医美态度 - China

“消费者清楚认识到医美的优势，包括成效显著和效果持久。然而，出于安全考虑，她们对做医美项目仍犹豫不决。相比更复杂的手术，无创轻医美逐渐被广泛接受。为迎合护理术后敏感皮肤的需求，商家可以考虑打造专业且值得信赖的品牌形象，将产品与具体项目方案挂钩，这应当能够满足消费者的术后恢复需求。”

— 靳尧婷，高级研究分析师

Attitudes towards Cosmetic
Surgery - China

“Consumers have a clear understanding of the advantages of cosmetic surgery, including its effective results and long-lasting effects; however, they are still hesitant about going through with it due to safety concerns, with light non-invasive procedures becoming widely accepted compared to more involved surgeries. To cater to the needs of ...

October 2021

婴幼儿护理用品 - China

“中国的出生率很可能继续下滑，因此，婴幼儿护理用品市场的增长动力将主要来自婴幼儿人均花费的提高。如今90后父母正逐渐崛起，成为该品类的消费主力。对此，品牌可考虑更新营销策略，比如通过带娃日记等方式与消费者沟通育儿经验，抓住消费者喜好，同时推出更细分的产品以创造新需求，从而促进品牌增长。”

Soap, Bath and Shower Products -
China

“Bath and shower is no longer just a functional category focused on personal hygiene. Today's consumers are doing various activities, from skincare to entertainment, in their bathroom and taking showers and baths to relax and indulge themselves. Therefore, shower and bath products need to provide more emotional value to help ...

美容仪器 - China

“由于消费者希望靠美容仪器解决特定的皮肤问题，她们对美容仪器的需求因此有所增长，这使得去年各种产品类型的使用率上升。其中，洁面仪及补水保湿仪等基础产品的用户群增长最明显。这表明，消费升级并非美容仪器市场的唯一趋势，因为消费者在使用美容仪器时，已变得更理智和实际。为了进一步吸引新消费者，品牌必须提供个性化的解决方案，以证明产品的有效性和安全性，如提供材质安全报告等。”

— 蒋亚利，高级研究分析师

防晒产品 - China

“随着UVB/UVA防护主流化，防晒产品有机会将防护范围扩展至全光谱防晒等领域，在不同场合全面抵御有害的外界因素，如保护皮肤免受室内外空气污染影响，同时以令人信服的、升级改良的额外护肤功效推动女性和男性使用者升级消费。”

— 尹昱力，研究分析师

女士面部护肤品 - China

“中国女性的多步骤护肤流程及对高功效产品的强劲需求驱动市场增长。为了保持对消费者的吸引力，以及降低她们转向极简护肤的风险，品牌需持续升级消费者的居家护肤流程，提供更多专业方案，如利用SPA和医美宣称，并探索产品形态/质地的创新。此外，DIY（自己动手）概念不仅能把面部护肤流程转化为一种体验，也能让消费者打造专属配方，因此具备发展潜力。”

Beauty and Personal Care - China

身体护理用品 - China

“2021年，身体护理用品市场主要由健康趋势与高端化驱动。尽管消费者基本没有增加日常身体护理流程，但他们以面部护肤的标准对待其他部位的皮肤。因此，结合明星成分的高级配方与特定部位的精细护理产品能够引起消费者的共鸣。而在足部护理细分，满足消费者对放松的需求，用产品组合扩充消费者的购物车十分重要。”

——柴静彦，研究分析师

男性美容护理流程 - China

“即使疫情的影响不断减弱，男性对面部护肤品的使用仍然呈两极化趋势，这是一把双刃剑。一方面，该市场迎来更多男性美容爱好者，将带动更多高阶面部修护产品的使用；另一方面，不使用或偶尔使用面部护肤品的男性消费者数量不断增加，说明男性消费者对面部护肤品的需求不如女士消费者普遍，限制了该市场的未来发展潜力。”

— 李玉梅，研究副总监

September 2021

Baby Personal Care - China

“The decline in China’s birth rate is likely to continue hence the market growth of the baby personal care category will mainly come from the increased spending per baby. The post-90s parents are now emerging to become the main purchasing power in this category, hence updating marketing strategies such as ...

Bodycare - China

“In 2021, the bodycare market is mainly driven by wellbeing trends and premiumisation. Although consumers are barely expanding their bodycare routines, they are treating every part of the body skin with facial-care standards. Therefore, high-grade formulas with a combination of hero ingredients and delicate care for specific areas can resonate ...

面部清洁和卸妆产品 - China

“额外护肤功效及更温和的产品将继续推动面部清洁和卸妆产品市场的销售额增长。然而，面对红海竞争，品牌推广产品的温和性时，不妨走出单调的“敏感肌适用”宣称，并通过产品解决方案，提供切实可行的必备护肤功效，以激发消费升级兴趣。”

Suncare - China

“With UVB/UVA protection now mainstream, sunscreen products are seeing opportunities to extend their protection range into the full light spectrum and beyond, offering comprehensive protection against external harmful elements in different occasions, such as shielding skin against outdoor and indoor air pollution; as well as driving trading up among ...

Beauty Devices - China

“Consumers’ rising needs for beauty devices to tackle specific skin issues have resulted in increased usage of various types in the last year, among which basic items like cleansing devices and hydration devices have seen the largest user base expansion. This reveals trade-up is not the only trend in the ...

Women's Facial Skincare - China

“Chinese women’s multistep routines and strong demand for high-efficacy products fuel market growth. In order to maintain the engagement and minimise the risk that consumers change to the skin minimalism approach, brands need to continuously elevate consumers’ at-home routines, providing more professional solutions, such as leveraging spa and clinical claims ...

Facial Cleansing and Makeup Removal Products - China

“Additional skincare benefits and milder products will continue to drive value growth in both the facial cleansing and makeup removal product markets. However, in the face of intense competition, brands are

– 尹昱力，研究分析师

August 2021

Men's Grooming Routines - China

“Men’s usage of facial skincare products continues to become polarised even after the impacts from COVID-19 have been diminishing, which is a double-edged sword. While more male beauty enthusiasts emerge to drive usage of more advanced facial treatment products, a growing number of non-users or occasional users means facial skincare ...

recommended to step beyond simply claiming ‘suitable for sensitive skin’ when conveying mildness, and offering realistic, achievable must-have skincare ...

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。”

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。”

– 靳尧婷，研究分析师

– 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’

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

Beauty and Personal Care - China

current pain points of wearing base makeup products, such as moisturising for ...

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

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 ...

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

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 ...

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

Beauty and Personal Care - China

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

Attitudes towards Prestige BPC Products - China

“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 ...

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

口腔护理 - China

“口腔护理的意义不仅在于保持清洁，也是人们健康和美容流程中至关重要的一部分。一方面，口腔护理产品需要与消费者的整体健康联系起来，扩大其使用范围，针对更多的口腔问题；另一方面，牙齿外观变得与口腔健康同样重要，这带动了牙齿美白产品的增长。从包装到成分，口腔护理产品都可以借鉴美妆行业的趋势来吸引消费者，但仍需要更多市场教育。”

— 李玉梅，副总监

在这篇报告中我们探讨了以下议题：

美容成分认知 - China

“美妆与个人护理产品的功效之争愈演愈烈，现已上升到成分层面。随着品牌渠道、第三方平台和专业KOL（关键意见领袖）正塑造消费者敏锐的成分认知，品牌可从不同角度设计成分定位，比如在命名、宣传和细分上下功夫，从而更好地与日渐成熟精明的消费者产生共鸣。”

— 尹昱力，研究分析师

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

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

Beauty and Personal Care - China

educational and experiential offering to connect with consumers, while online platforms need to team up with brand ...

BPC Ingredient Knowledge - China

“The competition over BPC product efficacy is now intensified to the ingredient level. With branded channels, third-party platforms and professional KOLs shaping keen consumers’ ingredient knowledge, ingredient positioning can be designed from various aspects – naming, communicating, and segmentation to better resonate with consumers who are growing savvier.”

– ...

tackle aging problems is becoming more inclusive. With consumers looking beyond skincare products when treating skin ...

造型和染发用品 - China

“疫情期间，染发用品市场比头发造型用品市场更具韧性。但消费者对发色的喜好已从去年的鲜艳色彩迅速转变为如今的自然色。虽然消费者的喜好有所改变，但更安全和天然的解决方案仍是核心诉求。从头发造型产品来看，不受疫情担忧的影响，消费者仍然将更复杂的造型需求交给美发师打理。这将需要家用美发造型产品提供效果显著的解决方案，让头发看起来更健康，从而与护发用品品类竞争。”

– 靳尧婷，研究分析师

March 2021

Oral Care - China

“The importance of oral care is not just about maintaining hygiene; it’s a crucial part of people’s health and beauty routines. For one thing, oral care products could be positioned more holistically in relation to health and expand their territories to treat more oral health issues; for another, the appearance ...

洗发护发产品 - China

“消费者越来越关注洗发护发产品的功效，其中护理功效最受关注。消费者认为健康的头皮与更好的发质相关，并且有兴趣保持头皮/头发长期的健康，因此，头皮护理未来的机会在于走出防脱发，大胆融入到其他护理功效的从头皮到发尾的护理故事；突破即时的护理效果，转而修复和维持头皮/头发的长期整体健康提供解决方案。”

– 尹昱力，研究分析师

February 2021

Hair Colourants and Styling Products - China

“The hair colourants market has been more resilient than the styling market during COVID-19. But consumers’ colour preference has shifted rapidly from vibrant colours which were in last year to more natural colour today. Despite the changes, safer and natural solutions remain the core needs. As for styling products, consumers ...

Haircare - China

“Consumers are growing into function driven for haircare products, where caring features are taking the lead. As consumers associating health scalp to better hair conditions and interested in maintaining long-term scalp/hair healthiness, the future opportunities of scalp care is to go beyond anti-hair loss and boldly blend into other ...