

Hair Colourants and Styling Products - China - January 2020

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“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 consumers.”

– Anne Yin, Associate Research Analyst

This report looks at the following areas:

- Easy fashion on my head
- Prolonged colourants with controlled damage
- Build fun and easy-to-use styling products for online

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Hair Colourants and Styling Products - China - January 2020

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

- What you need to know
- Covered in this report
- Excluded
- Subgroup definitions (by Monthly Personal Income)

Executive Summary

The market

Hair colourants market

Figure 1: Best- and worst-case forecast of total value sales of hair colourants, China, 2014-24

Hair styling products market

Figure 2: Best- and worst-case forecast of total value sales of hair styling products, China, 2014-24

Companies and brands

Figure 3: Leading manufacturers' share of value sales of hair colourant products, China, 2018 and 2019

Figure 4: Leading manufacturers' share of value sales of hair styling products, China, 2018 and 2019

The consumer

At-home occasion is still niche for hair colouring and styling

Figure 5: Behaviour and occasion of hair beauty in the last six months, by gender, November 2019

Females outstrip males in number of items used for both hair colouring and styling

Figure 6: At-home hair colourants and styling products used in the last six months, by gender, November 2019

Respondents adopt international hair styling brands more

Figure 7: At-home hair styling brands purchased in the last six months, November 2019

Pain points of styling products occur in performance, usage, and sensations

Figure 8: Pain points of at-home hair styling products, November 2019

Over half of surveyed users chose hair colourants from Schwarzkopf and L'Oréal

Figure 9: At-home hair colourant brands purchased in the last six months, November 2019

Reducing damage at ingredient level is more important than aftercare

Figure 10: Features for ideal at-home hair colourant products, November 2019

Consumers are explorative and engaged by hair colour trends

Figure 11: Behaviours and attitudes towards hair colouring, November 2019

What we think

Issues and Insights

Easy fashion on my head

The facts

The implications

Prolonged colourants with controlled damage

The facts

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Hair Colourants and Styling Products - China - January 2020

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The implications

Figure 12: Example of colour caring products launch, China, 2019

Build fun and easy-to-use styling products for online

The facts

The implications

Figure 13: Example of interactive packaging design and styling products with fun format change, China and France, 2019

The Market – What You Need to Know

Hair colourants market continues to lead growth

Regulations and consumers together pushing for product safety

Market Size and Forecast

Hair colourants market heading towards RMB4.0 billion

Figure 14: Best- and worst-case forecast of total value sales of hair colourants, China, 2014-24

RMB3.5 billion hair styling market growing steady

Figure 15: Best- and worst-case forecast of total value sales of hair styling products, China, 2014-24

Market Factors

Grey hair coverage expanding and starts early

Hair in fashion

E-commerce changes the rules

Dyeing and styling hair despite understanding the possible harm

Regulations chasing away defects

Key Players – What You Need to Know

Further centralised hair colourant market

Domestic styling products seeking opportunities online

Market Share

L'Oréal and Henkel lead the fast-growing hair colourant market

Figure 16: Leading manufacturers' share of value sales of hair colourant product, China, 2018 and 2019

Figure 17: Examples of L'Oréal hair colourants with online topicality, China, 2019

Figure 18: Schwarzkopf Freshlight presenting top three 'male killer' colours, China, 2019

Slowly decentralising styling market led by Beiersdorf

Figure 19: Leading manufacturers' share of value sales of hair styling products, China, 2018 and 2019

Figure 20: Examples of Maestro for Men new launches, China, 2019

Which brands performed well on e-commerce platforms?

Figure 21: Top 10 brands of online* value sales of hair colourant products**, China, November 2018 – October 2019

Figure 22: Top 10 brands of online* value sales of hair styling products**, China, November 2018 – October 2019

Competitive Strategies

Refresh image through deep collaborations with young male celebrities

Figure 23: VS collaborating with top traffic male stars, China, 2018-19

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Hair Colourants and Styling Products - China - January 2020

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Premiumisation with international exposure

Figure 24: Examples of Maestro at Milan Fashion Week backstage, China, 2019

Build brand-owned hair colour trends

Figure 25: Example of KAO selling new hair colourants via Tmall international, China, 2019

Leverage flexibility and engagement of online platforms

Figure 26: Example screenshots of short videos on Xiaohongshu demonstrating hair combing mascara, China, 2019

Who's Innovating?

Henkel exploring business models in bespoke colourants

Tap into hair colour after-care

Figure 27: Example of hair colourant brand tapping into colour aftercare

Graphene might offer a healthy colouring solution

Leverage terms popular in beauty sectors

Figure 28: Examples of hair styling products with beauty-related concepts, UK, US, and France, 2019

Transforming formats could help build momentum online

Figure 29: Example of L'Oréal format changing styling product, France, 2019

Caring ingredients in styling products to promote scalp health

Figure 30: Examples of hair styling and colouring products with scalp caring feature, Japan and South Korea, 2019

The Consumer – What You Need to Know

31% of females and 14% of males have curly hair

Tier two city residents have greater interest in various products

Limited gap in hair styling product brands used across city tiers

Pain points skew to styling products' performance and usage experience

International hair colourant brands remain dominant

Consumers are proactively seeking colourants with reduced damage

Explorative consumers eager to try new and go with trends

Hair Style and Services Usage

63% of females have mid-length hair and one third of them are curly

Figure 31: Hair length and style, by gender, November 2019

Figure 32: Type of hairstyle, by gender, November 2019

At-home hair styling and colouring are still niche

Figure 33: Behaviour and occasion of hair beauty in the last six months, by gender, November 2019

Consumers from tier two cities more involved in styling and colouring

Figure 34: Behaviour and occasion of hair beauty in the last six months, by city tier, November 2019

Hair Colourant and Styling Products Usage

Common styling products users skew to males and colourants to females

Figure 35: At-home hair colourant and styling products used in the last six months, by gender, November 2019

Females are more sophisticated even in styling product usage

Figure 36: Repertoire of at-home hair colourants used in the last six months, by gender, November 2019

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Hair Colourants and Styling Products - China - January 2020

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 37: Repertoire of at-home hair styling products used in the last six months, by gender, November 2019

Lower tier cities unleashed their great interest in products

Figure 38: At-home hair styling products used in the last six months, by city tier, November 2019

Figure 39: At-home hair colourants used in the last six months, by city tier, November 2019

Volumising power prevailing among young generation

Figure 40: At-home hair colourants and styling products used in the last six months, 18-24 yrs vs total (as benchmark), November 2019

Purchased At-home Hair Styling Brands

VS and L'Oréal still dominating the market

Figure 41: At-home hair styling brands purchased in the last six months, November 2019

Figure 42: At-home hair styling brands purchased in the last six months, 2019-20

Lower tier cities' enthusiasm expediting channel saturation

Figure 43: At-home hair styling brands purchased in the last six months, by city tier, November 2019

Mind the aging user base

Figure 44: At-home hair styling brands purchased in the last six months, by age, November 2019

Pain Points of At-home Hair Styling Products

Guiding consumers' usage remains priority

Figure 45: Pain points of at-home hair styling products, November 2019

Females seek puffy results and better additional features

Figure 46: Pain points of at-home hair styling products, by gender, November 2019

Users with longer hair need more help

Figure 47: Pain points of at-home hair styling products, by hair style, November 2019

Purchased At-home Hair Colourant Brands

Schwarzkopf and L'Oréal reach over half of users

Figure 48: At-home hair colourants brands purchased in the last six months, November 2019

Top brands gaining young consumers' attention

Figure 49: At-home hair colourants brands purchased in the last six months, by age, November 2019

Higher earners have more diverse brand interests

Figure 50: At-home hair colourants brands purchased in the last six months, by monthly personal income, November 2019

Features for Ideal At-home Hair Colourant Products

Free from irritating ingredients over finding naturally sourced colourants

Figure 51: Features for ideal at-home hair colourant products, November 2019

Female users demand safer products with more detailed instructions

Figure 52: Features for ideal at-home hair colourant products, by gender, November 2019

Higher earners look for additional caring ingredients and vegan formulas

Figure 53: Features for ideal at-home hair colourant products, by monthly personal income, November 2019

Behaviours and Attitudes towards Hair Colouring

Trendy colour offers stronger drive than grey coverage

Figure 54: Behaviours and attitudes towards hair colouring, November 2019

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Hair Colourants and Styling Products - China - January 2020

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Chinese respondents are more explorative compared to the UK

Figure 55: Behaviours and attitudes towards hair colouring – 'yes', UK and China, November 2019

Grey coverage demand soars after 25

Figure 56: Behaviours and attitudes towards hair colouring – 'yes', female, by age, November 2019

Explorative older age groups

Meet the Mintropolitans

Mintropolitans eager to try new things

Figure 57: Gap of behaviours and attitudes towards hair colouring – 'yes', Mintropolitan vs non-Mintropolitan (as benchmark), November 2019

Figure 58: At-home hair colourant and styling products used in the last six months, by consumer classification, November 2019

Mintropolitans demands neat and damage free styling products

Figure 59: Gap of pain points of at-home hair styling products, Mintropolitans vs non-Mintropolitans (as benchmark), November 2019

Mintropolitans care more about safe and caring colourant ingredients

Figure 60: Features for ideal at-home hair colourant products, by consumer classification, November 2019

Appendix – Market Size and Forecast

Figure 61: Total value sales of hair colourants, China, 2014-24

Figure 62: Total value sales of hair styling products, China, 2014-24

Appendix – Methodology and Abbreviations

Methodology

Fan chart forecast

Abbreviations

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com