

Bodycare - China - September 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.



“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. .”

– Amy Jin, Research Analyst

This report looks at the following areas:

- Leaving good skin feel is still an important message, especially to recruit non-users
- Focusing on benefits such as anti-aging that shower products find hard to deliver
- Localise wellbeing concept in bodycare by paying attention to footcare yangsheng

In the bodycare category, usage experiences are particularly important, as it is highly reliant on skin feel. Unlike in other BPC sectors where visuals are more important and easily communicated to consumers, the skin feel of bodycare products are very personal. Consumers tend to judge themselves what is a 'comfortable' bodycare product. Although 'good skin feel' varies by individual, for skincare, it often skews towards texture, such as easy and fast absorption, so ingredient components with those deliverables are worth noting. Marketing activities including free samples and product trials give opportunities to consumers to experience bodycare products and encourage usage. Overall, reassuring good skin feel is not only important to recruit new users of low penetration product categories but also essential to differentiate brands from one another.

In addition, the increased usage of anti-bacterial hand wash and sterilisers have increased the needs for using nourishing and repairing bodycare products. As consumers are more aware of their health, taking good care of body skin is becoming more important in consumers' minds. The total market size of the bodycare category is growing at a CAGR of 8.8% over 2015-20 to reach RMB10,834 million in 2020. Facing possible threats from the shower category that provide similar skin solutions, focusing on innovations beyond simple hydration and moisturising, tapping into the Skinification (requests of facial skincare) trend to provide benefits such as anti-aging and whitening that shower products find hard to achieve is the key to differentiate the two categories and bring opportunities for further growth.

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

Bodycare - China - September 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
- Subgroup definition (by monthly personal income)

Executive Summary

- Impact of COVID-19 on bodycare market
- Focus on the category dynamics instead of COVID-19
- Figure 1: Short, medium and long-term impact of COVID-19 on bodycare, September 2020

The market

- Figure 2: Market value and forecast of bodycare, China, 2015-25

Companies and brands

- Figure 3: Leading manufacturers' share in value sales of bodycare products, China, 2018-19

The consumer

- Hand cream remained the most used products while footcare saw an increase in usage
- Figure 4: Product usage, June 2020 vs April 2019

- Raising relevance and address good skin feel are top challenges of growing low usage products
- Figure 5: Reasons not to use bodycare, June 2020

- Opportunities in tapping into Skinification Trend in bodycare
- Figure 6: Desired improvements in body skin, June 2020

- A product-driven category: ingredient and format are top considerations
- Figure 7: Important purchase factors, June 2020

- Importance of bodycare is increasing but engagement is still low compared to other beauty categories
- Figure 8: Attitudes towards bodycare, June 2020

- An all year product with different seasonal needs to cater to
- Figure 9: Usage habits of body lotion, June 2020
- Figure 10: Usage habits of body lotion, June 2020

What we think

Issues and Insights

- Leaving good skin feel is still an important message, especially to recruit non-users

The facts

The implications

- Figure 11: Advertisement of body lotion focusing on skin feel, China, 2020
- Figure 12: Alma K. body scrub is claimed to be suitable for sensitive skin, China, 2020

- Focusing on benefits such as anti-aging that shower products find hard to deliver

The facts

The implications

- Figure 13: Clarin's anti-aging body lotion, China, 2020

**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

Bodycare - China - September 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 14: Becca X Chrissy Teigen Endless Summer Glow, USA, 2019

Figure 15: Dior body powder, China, 2020

Localise wellbeing concept in bodycare by paying attention to footcare yangsheng

The facts

The implications

The Market – What you need to know

More innovation needed to secure the growth

Increase usage occasions due to the COVID-19 lockdown

Body remains the largest segment

Market Size, Segmentation and Forecast

Growth continues but is slightly slower

Figure 16: Market value forecast of bodycare, China, 2015-25 (est)

The body segment still plays the most important role in growth

Figure 17: Market value of bodycare, by segment, China, 2016-20 (est)

Market Factors

Hygiene habits drive the need for hydration after the outbreak

Bodycare products are no longer limited to seasonal use

Threats from the shower category with similar benefits

Figure 18: Top 10 claims in shower product launches, China, 2018-20 (to September)

Opportunities for footcare products used to enhance general well-being

Companies and Brands – What you need to know

Unilever maintains the top position in market share

Launching a full range of products to satisfy all needs

Link bodycare to general health

Market Share

Vaseline's performance helped Unilever to maintain its leading position

Sesderma closing Tmall official store

Premium brands continue to perform well

Figure 19: Leading manufacturers' share in value sales of bodycare products, China, 2018-19

Domestic internet-based brands continue to grow

Competitive Strategies

Brands upgrade by borrowing concepts/trends from facial skincare

Figure 20: Olay body essence, China, 2020

Traditional Chinese brand with modern design

Figure 21: Maxam's recent marketing posters, China, 2019

Full product line for different skin conditions and usage occasions

Figure 22: Vaseline's full range of body lotion products, China, 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

Bodycare - China - September 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 23: Olay's body lotion range, China, 2019

Figure 24: Maxam's hand cream range, China, 2020

Prestige fragrance brands offering premium bodycare products

Figure 25: Bodycare products of fragrance brands, China, 2020

Who's Innovating?

Bodycare products saw an increase in 2019 while footcare emerges in 2020

Figure 26: Newly launched bodycare products by segment, China, 2018-20 (to September)

Figure 27: Eastern medicine foot patch, China, 2020

Claims of vitamin/mineral fortified increased in 2020

Figure 28: Top 10 claims in new hand/nail care product launches, China, 2018-20 (to September)

Figure 29: Handcare products claimed vitamin/mineral Fortified, China, 2020

Figure 30: Top 10 claims in bodycare product launches, China, 2018-20 (to September)

Figure 31: Bodycare products claiming vitamin/mineral fortified, China, 2020

Figure 32: Bodycare products claiming brightening/illuminating, China, 2020

Different innovation in claims compared to global bodycare trends

Figure 33: Top 10 claims in bodycare product launches, Global, 2018-20 (to September)

Figure 34: Bodycare products claiming dermatologically tested, France and Chile, 2020

Adding an element of taste in the body lotion

Figure 35: Scentlibrary White Rabbit body lotion, China, 2019

Figure 36: Mistine milk tea body lotion, Thailand, 2019

AI skin test for body skin too

Figure 37: Vaseline AI body skin test, China, 2019

Hand cream specifically designed for men

Figure 38: Male hand cream, China, 2019

The Consumer –What You Need to Know

Hand cream remains the most used bodycare product

Uncomfortable skin feel is the top barrier to using bodycare products

Basic hydration is a must but pursue further skin demands

50% of consumers are looking for natural ingredients in bodycare

Body skin has become more important

Most consumers use body lotion year-round

Trends in Product Usage

Hand cream remains the most popular bodycare product

Figure 39: Product usage, June 2020 vs April 2019

Figure 40: Types of products used, June 2020

Females remain the main users of bodycare

Figure 41: Product usage, male vs female, June 2020

Consumers aged 25-29 are most enthusiastic towards bodycare

**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

Bodycare - China - September 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 42: Product usage, by age, June 2020

Barriers to Use Bodycare

Skin feel matters the most

Figure 43: Reasons not to use bodycare, June 2020

Younger consumers prefer convenient application for body lotion

Figure 44: Reasons not to use body lotion/cream/balm, by age, June 2020

Ideal Body Skin Conditions

Basic hydration is a must-have with similar demand as facial skincare

Figure 45: Desired improvements in body skin, June 2020

Using multiple products to achieve better results

Younger consumers are more interested in whitening

Figure 46: Desired improvements in body skin, by age, June 2020

Figure 47: Little dream garden body spray

Important Purchase Factors

Natural ingredients rank as the top selection factor

Figure 48: Important purchase factors, June 2020

Certificates and brands matter more to affluent consumers

Figure 49: Important purchase factors – very important, by monthly personal income, June 2020

Important purchase factors vary with different age group

Figure 50: Important purchase factors – very important, by age, June 2020

Attitudes towards Bodycare

More than half of consumers link body skin to overall body health

Figure 51: Attitudes towards bodycare, June 2020

Females enjoy the extra benefit brought by bodycare products

Figure 52: Attitudes towards bodycare, June 2020

Affluent consumers are looking for more from bodycare

Figure 53: Attitudes towards bodycare, by monthly personal income, June 2020

Usage Habits of Body Lotion

An essential product with more than just hydration needs

Figure 54: Usage habits of body lotion, June 2020

Figure 55: Usage habits of body lotion, June 2020

Consumers of higher income are using more body lotion

Figure 56: Usage habits of body lotion, by monthly personal income, June 2020

Meet the Mintropolitans

MinTs are more likely to use more types of bodycare products

Figure 57: Product usage, by consumer classification, June 2020

MinTs are looking for more in bodycare

**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

Bodycare - China - September 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.

MinTs are more sophisticated when purchasing bodycare products

Figure 58: Important purchase factors, by consumer classification, June 2020

Appendix – Market Size and Forecast

Figure 59: Market value and forecast of total bodycare, China, 2015-25

Figure 60: Market value and forecast of hand/nail care, China, 2015-25

Figure 61: Market value and forecast of footcare, China, 2015-25

Figure 62: Market value and forecast of bodycare, China, 2015-25

Appendix –Methodology and Abbreviations

Methodology

**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