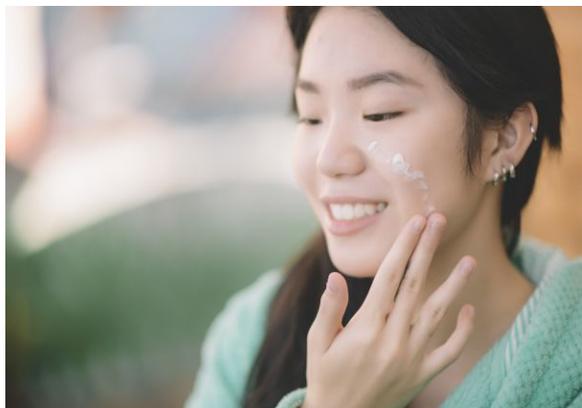


Suncare - China - October 2020

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.



“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.”

– Anne Yin, Research Analyst

This report looks at the following areas:

- The impact of COVID-19 on China's suncare market
- The performance of companies and brands
- Launch activity and notable innovations
- Consumer usage of and attitudes towards suncare products
- Features to prioritise when building sunscreens
- Key attributes associated to safe sunscreens
- Key attributes associated to good sunscreen protective efficacy
- Key attributes associated to good sunscreen skin sensation

In the last five years the China suncare market has demonstrated double-digit growth, supported by consumers' growing interest in beauty, skincare, and anti-aging. However, in 2020, COVID-19 dragged down the growth rate to single digits, impacting consumers' spending power and ability to trade up, while reducing the occasions for going out and traveling among sunscreen users. However, consumer data suggests that increased mask-wearing and reduced outdoor activity has had little impact on the usage of sunscreen for indoor occasions and within an urban environment, which sustained a positive growth, despite the negativities as a result of the outbreak.

Looking forward, consumers' established awareness and habits in using sunscreen products could help to facilitate a quick restoration of growth. Users' pursuit of better protective efficacy, in terms of enhanced duration and extended coverage, as well as product safety, in terms of cleanness for both humans and the environment, will continue to drive the base line of the suncare market's future growth. At the same time, consumers' trade ups towards more added skin benefits suiting their own skin conditions bring more opportunities to further boost the market value 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

Suncare - China - October 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

- Key issues covered in this Report
- Report scope
- Subgroup definition (by monthly personal income)

Executive Summary

Impact of COVID-19 on suncare market

Figure 1: Short-, medium- and long-term impact of COVID-19 on the suncare market, October 2020

The market

A slower yet growth in 2020

Quick restoration expected

Figure 2: Total value sales of suncare products, China, 2015-25

Companies and brands

Star products define market success

Figure 3: Leading manufacturers' share in value sales of suncare market, china, 2018-19

The consumer

Niche formats need further segmentations to attract adoption

Figure 4: Usage of suncare products, June 2020

Include safety and suitability in sunscreen story

Figure 5: Consideration factors for sunscreen, June 2020

Safety reassurance is built by both a clean formula and attention to skin sensitivity

Figure 6: Associations with safety, June 2020

Expand the breadth of protection

Figure 7: Associations with strong protective effect, June 2020

Skin sensation has opportunity in skin type segmentation via water oil balance

Figure 8: Associations with good skin sensation, any ranking, among females, by skin type, June 2020

Skincare products with SPF could not replace caring sunscreens

Figure 9: Attitudes towards SPF skincare and sunscreen with caring features, June 2020

What we think

Issues and Insights

Biological sunscreen layer waiting for the spot light

The facts

The implications

Figure 10: Examples of using natural sourced sunscreens in addition to physical sunscreen, South Korea, 2020

Selectively expand protection coverage with consumer education

The facts

The implications

Figure 11: Example of brand distinguishing the impacts of different spectrum fragments on skin, 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

Suncare - China - October 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 12: POLA light selector, Japan, 2020

Provide better skin sensations by addressing different skin type needs

The facts

The implications

Figure 13: Examples of sunscreen in precise applicators to use the right amount on the needed area, Italy and UK, 2020

The Market – Key Takeaways

COVID-19 temporarily drags down the fast growth in 2020

Quick restoration expected shortly

Market Size and Forecast

Single digit growth in 2020

Figure 14: Total value sales of suncare products, China, 2015-25

Impact of COVID-19 on suncare market

Figure 15: Short-, medium- and long-term impact of COVID-19 on the suncare market, October 2020

Suncare market showing resilience

Figure 16: Change in usage of facial skincare products, June 2020

Affluent consumers to lead the growth restoration...

Figure 17: Change in usage of sunscreen products, by personal income, June 2020

... through indoor usage in 2020

Growth momentum is expected to pick up, returning to double-digit in 2021

Market Factors

Product relevance well established, especially among females

COVID-19 brings both challenges and opportunities

Demand for additional skincare benefits drives future trading up

National regulation over blue light protection shows cue for differentiation

Companies and Brands – Key Takeaways

Fragmented market with hero products defining brand performance

Competing over persuasiveness

Innovations in extending safety and intensifying caring benefits

Market Share

Fragmented market dominated by international brands

Figure 18: Leading manufacturers' share in value sales of suncare market, china, 2018-19

International companies' growth drove by hero items

Figure 19: New launches from L'Oréal, China, 2019

Figure 20: ANESSA new launch with heat-force technology, China, 2020

Established disruptors continue growth via expanded range

Figure 21: Sunscreen products from Isdin, China, 2019

Competitive Strategies

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

Suncare - China - October 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.

A competition of persuasiveness in functionalities

Scientific evidence to justify protectiveness

Figure 22: Example of brands proving their protective effect via dermatology tests, China, 2020

Figure 23: Examples of KOLs using machines to test sunscreens, China, 2020

Educate about safe ingredients to take head start in safety

Figure 24: Example of brand educating about harmful ingredients, China, 2020

Leverage special registration to compete over whitening story

Figure 25: Examples of whitening sunscreens with double special registration, China, 2020

Leveraging success in the anti-aging arena

Figure 26: Examples of sunscreen extended from anti-aging skincare lines, China, 2020

Novelty concepts to shake up the market

Figure 27: Supergoop! transparent sunscreen, China, 2020

Launch Activity and Innovation

Clean movement wave in sunscreen category

Figure 28: Change of top five ethical claims among new launched sunscreen products globally, January 2018-October 2020

Figure 29: Examples of chemical sunscreens in the clean movement, US and Japan, 2020

Physical sunscreens furthered in safety

Figure 30: Examples of nearly 100% natural and green physical sunscreens, UK and South Korea, 2020

Figure 31: Examples of non-nano physical sunscreens, Germany and South Korea, 2020

Sunscreen in foam format tackling inhalation concerns

Figure 32: Example of sunscreen foam, South Korea, 2020

Repairing ingredients with novelty science story blurred with skincare

Figure 33: Dr. Jart+ sunscreen ampoule, South Korea, 2020

Male sunscreens increasingly active

Figure 34: Examples of male sunscreens with expanded coverage and caring features, South Korea, Thailand, and China, 2019-20

The Consumer – Key Takeaways

Niche formats need better targeting to stand out

Skin condition should be flagged in communication

Clean and professionalism both demanded

Longer protection a top-ranking need

Both short- and long-term skin sensations matter

Resilient usage during COVID-19

Usage of Suncare Products

Big picture remains similar

Figure 35: Usage of suncare products, June 2020

Sunscreen spray could start age-based segmentation

Figure 36: Usage of sunscreen products - female, by age, June 2020

Combination skin females need a push in niche formats

**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

Suncare - China - October 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: Usage of sunscreen products - female, by skin type, June 2020

Figure 38: Skin type, by gender, June 2020

Consideration Factors

Skin suitability ranked third

Figure 39: Consideration factors for sunscreen, June 2020

Leverage usage experience to grow among younger women

Figure 40: Consideration factors for sunscreen, female, by age, June 2020

Figure 41: Example of sunscreen mousse, China, 2019

Combination skin equates to higher needs

Figure 42: Consideration factors for sunscreen, female, by skin type, June 2020

Associations with Safety

Clean sunscreen ingredients

Figure 43: Associations with safety, June 2020

Inhalation concerns

Younger females trust professionally tested products

Figure 44: Associations with safety, among females, by age, June 2020

Balance between natural image and professionalism

Figure 45: TURF analysis of associations with safety, June 2020

Associations with Protective Effect

Consumer desire longer protection

Figure 46: Associations with strong protective effect, June 2020

Males demand full protection as well

Heat-aging worth brand attention

Figure 47: TURF analysis of associations with protective effect, June 2020

Associations with Good Skin Sensation

Greasy and sticky should be tackled first

Figure 48: Associations with good skin sensation, June 2020

Differentiation via skin sensations for different skin types

Figure 49: Associations with good skin sensation, any ranking, females, by skin type, June 2020

Attitudes towards Sunscreen

Usage of sunscreen is resilient

Figure 50: Attitudes towards indoor and with-mask usage, June 2020

Ease the frequency barriers from skin burden concerns

Figure 51: Attitudes towards skin burdens from sunscreen, June 2020

Figure 52: Gap of consideration factors between consumers who are concerned over using too much sunscreen vs consumers who agree using sunscreen more could better protect skin (as benchmark), June 2020

Figure 53: Gap of associations with safety between consumers who are concerned over using too much sunscreen vs consumers who agree using sunscreen more could better protect skin (as benchmark), June 2020

Figure 54: Consumers' attitudes towards BPC products with SPF, by consumers' attitudes towards skin burden from sunscreen, June 2020

Consumers enjoy the benefits from sunlight

**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

Suncare - China - October 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 55: Attitudes towards beneficial sunlight, June 2020

Skincare in sunscreen attracting affluent consumers

Figure 56: Attitudes towards adding skincare functions in sunscreen, June 2020

Appendix – Market Size and Forecast

Figure 57: Total value sales of suncare products, China, 2015-25

Appendix – Methodology and Abbreviations

Consumer research methodology

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