

Beauty Devices - China - November 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.



“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, Research Analyst

This report looks at the following areas:

- The impact of COVID-19 on the beauty devices market
- The growth of the total market and different segmentations
- The competitive strategies and launch activities of brands
- Consumer usage of beauty devices
- Adoption barriers of beauty devices
- Features attracting trade-up
- Skin benefits attracting the next/first purchase
- Awareness of and associations with mainstream advanced beauty technologies

The China beauty devices market has achieved booming growth over the past few years. In 2020, although COVID-19 had an impact on consumers’ spending power, women’s rigid beauty demands and their trade-up intention towards more advanced technologies and devices in pursuit of more advanced skin benefits pushed the market to another year of fast, double-digit growth.

Female consumers’ demand for upgraded beauty devices is reshaping the segment landscape, with the shaping and anti-aging segments moving into the spotlight in 2020, and the cleansing and purifying segment losing its long-held shine. With the competition growing more intense, brands that can meet consumers’ evolving demands in beauty devices, and enhance their persuasiveness in efficacy and safety, could succeed in future.

**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

Beauty Devices - China - November 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

Definitions

Subgroup definition (by monthly personal income)

Executive Summary

COVID-19 has temporarily impacted spending on beauty devices

Figure 1: Short-, medium- and long-term impact of COVID-19 on the beauty device market, November 2020

Market and competition

Continued fast growth but at a slower rate than previous years

Figure 2: Total value sales of China beauty devices market, 2019-20

Segments landscape changing

Severe competition in proving efficacy and safety

The consumer

Increase in repertoire but facial cleansing devices losing younger women

Figure 3: Usage of beauty devices, August 2020

Price lower ranked as a barrier than uncertainty about efficacy

Figure 4: Reasons for not using, August 2020

Total upgrade desired by sophisticated users

Figure 5: Features worth paying more for, August 2020

Users and non-users look for similar skin benefits in next purchase

Figure 6: Skin problem to tackle with beauty device, August 2020

Broad awareness of beauty technologies among users and non-users

Figure 7: Usage and knowledge of beauty technologies, August 2020

EMS and RF are more associated with being effective and high-tech

Figure 8: Correspondence analysis – perceptions of different beauty devices, August 2020

What we think

Issues and Insights

EMS and RF will continue to prevail but safety essential

The facts

The implications

Figure 9: Example of shock prevention EMS device, China, 2020

Total function upgrade demanded

The facts

The implications

Laser treatment demanded but needs to go mild before taking off

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

Beauty Devices - China - November 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

Market and Competition – Key Takeaways

- A fast-growing market despite interruptions from COVID-19
- Not all segments enjoying fast growth
- Competition mainly focused on efficacy and safety

Market Size

- Another year of quick expansion despite COVID-19
Figure 10: Total value sales of China beauty devices market, 2019-20
- Lockdown period boosted usage frequency due to altered beauty priorities
Figure 11: Change in usage of facial skincare products, June 2020
- Purchases are hindered due to financial impacts
Figure 12: Female financial situation and confidence, by monthly personal income level, March-November 2020

Market Segmentation

- Fast-growing market saw significant differences among segments
- Boosting and anti-aging segment enjoys remarkable growth
Figure 13: Example devices from shaping and boosting segment, China, 2020
Figure 14: Examples of domestic brands including RF for premiumisation, China, 2020
- Eyecare segment continues to grow by extending popular facial devices
Figure 15: Example devices from eyecare segment, China, 2020
- Cleaning and purifying saw challenge from mildness
Figure 16: Example devices from cleaning and purifying segment, China, 2020
- Trendy new products sustained positive growth for hydration segment
Figure 17: Example devices from hydration segment, China, 2020
- LED therapy devices cannibalised and laser devices not yet taking off
Figure 18: Example devices from skin treatment segment, China, 2020

Market Factors

- Investment in beauty is rigid
Figure 19: Consumers' spending change on beauty products, China, March-November 2020
- Function-driven consumers trust beauty technologies
- Popularity of beauty services could fuel device demand too
- Domestic brands expand and lower the price of advanced devices
Figure 20: Examples of domestic beauty devices with RF, China, 2020
- Safety problems start to expose inferior offerings
Figure 21: CCTV Caijing reported safety problems of popular beauty devices, China, 2020

Competitive Strategies

- Compete over efficacy
Figure 22: Examples of brand efforts to ensure efficacy, China, 2020
- Compete over safety

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

Beauty Devices - China - November 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: Examples of brand efforts to communicate safety, China, 2020s

Facilitate smooth usage experience

Figure 24: Examples of brand efforts to improving usage experience, China, 2020

Utilise design to differentiate

Figure 25: Examples of beauty devices with novel designs, China, 2020

Launch Activity and Innovation

Mature brands extending lines to cover whole skincare routine

Figure 26: Examples of mature brands extending device lines, China, 2020

Popular brands expanding territory across sectors amid intense rivalry

Figure 27: Examples of popular brands expanding across sectors, China, 2020

Ultrasound knife at-home introduced

Figure 28: Example of at-home ultrasonic knife devices, China, 2020

Include more skin areas

Figure 29: Examples of devices usable for multiple body areas, China, 2020

Targeted application more precise and reduces irritation

Figure 30: P&G OPTE pigmentation removal laser device, China, 2020

Reduce friction to target sensitive skin

Figure 31: Example of smooth head cleansing device, China, 2020

Alter material to ease concerns

Figure 32: Example of devices with patented glass head, China, 2020

Features for temperature safety are increasing

Figure 33: Examples of beauty devices with enhanced sensor features, China, 2020

The Consumer – Key Takeaways

Younger women now have a different entry-level device

Prove efficacy to attract non-users

Trade up towards more benefits, safety, and suitability

Treatments for pores and eye area skin attract future purchases

Tech-aware consumers drive more detail in functional stories

RF, EMS, and ionic infusion will continue to go mainstream

Usage of Beauty Devices

Consumers increase device repertoire

Figure 34: Usage of beauty devices, August 2020

Figure 35: Change in usage of beauty devices, tier one cities, 2019 vs 2020 (as benchmark)

Nearly half remain non-users but have potential

Figure 36: Attitudes towards facial treatment at home or salon, August 2020

Limited gaps among different demographic groups

Figure 37: Non-users of beauty devices – 'I have not used beauty devices in the last 6 months', by selected demographics, August 2020

Figure 38: Usage of beauty devices, repertoire, selected demographics, August 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

Beauty Devices - China - November 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.

Massage devices become the most used item for women 18-24

Figure 39: Usage of beauty devices, by age, August 2020

Reasons for Not Using

Proving effectiveness still prioritised

Figure 40: Reasons for not using, August 2020

Convert doubters through mainstream beauty services

Figure 41: Effectiveness doubters' attitudes towards beauty technologies and beauty services, August 2020

High price is lower ranked as a barrier

Pair with skincare products to attract young women

Figure 42: Reasons for not using, by age, August 2020

Features Worth Paying More for

Multi-functional, safety and suitability trigger the greatest trade-up intention

Figure 43: Features worth paying more for, August 2020

Figure 44: Features worth paying more for – TURF analysis, August 2020

Sophisticated users are keener investors in upgrades

Figure 45: Features worth paying more for, by types of beauty devices used in the last six months, August 2020

Younger women are less patient in usage and trust credentials more

Figure 46: Features worth paying more for, by age, August 2020

Skin Problems to Tackle

Pore treatment worth attention

Figure 47: Skin problem to tackle with beauty device, August 2020

Targeted treatment for eyes as well

Figure 48: Consumers with different skin issues and their desire to tackle with beauty device, August 2020

Two fifths are interested in preventing aging with beauty devices...

Figure 49: Consumers' demand in tackling different skin issues with beauty devices and their current situation regarding each skin issue, August 2020

...but women aged 18-24 are the exception

Figure 50: Skin problem to tackle with beauty device, by age, August 2020

Usage and Knowledge of Beauty Technologies

Two fifths of consumers need more technology education

Figure 51: Usage and knowledge of beauty technologies, August 2020

Advanced devices could also be included when targeting new users

Figure 52: Knowledge of beauty technologies – know of (net), by beauty device usage, August 2020

Perceptions of Beauty Devices

Build high-tech, effective, and trendy devices in combination

Figure 53: Perceptions of beauty devices, August 2020

Figure 54: Correspondence analysis – perceptions of different beauty devices, August 2020

Add mildness to at-home laser therapy devices

Devices combining LED could replace standalone LED devices

**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

Beauty Devices - China - November 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.

Appendix – Beauty Technologies and Benefits in Beauty Devices

Figure 55: Technologies commonly used in beauty devices, 2020

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