

Women's Facial Skincare - China - 2021

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This report looks at the following areas:

- Competitive landscape and new product trends in China's facial skincare market.
- Changes in usage of facial skincare products and routines.
- Usage of facial oil and reasons for using the oil format.
- Consumer attitudes towards product format, texture and packaging.
- Consumer interest in sustainable packaging of facial skincare products.

In contrast to skin minimalism, Chinese women have further expanded the number of products they are using in their facial skincare routines. Notably, sun care has taken the place of facial cleanser as the most widely used facial skincare product, with penetration hitting 80%. Moreover, high-efficacy products, including facial serum, eye cream/serum and facial oil, have also experienced fast increases in usage. For example, usage of facial serum has increased from 66% in 2020 to 74% in 2021.

Chinese women's multistep routines, coupled with the strong demand for high-efficacy products, will continue to fuel the growth of China's facial skincare market. Brands need to provide more professional solutions, in terms of both efficacy and experience, for at-home use to maintain the engagement, while innovations around product format and texture will play a more important role in expanding routines.

Sustainability concerns will rise as a result of increased product usage. Brands could offer more sustainable packaging options, from reusable packaging to a recycling service, to help women ensure their routines are as sustainable as possible. However, consumers' willingness to pay varies with age – young women aged 18–24 are less willing to pay more for sustainable packaging.



“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 and exploring format/texture innovations.”

– Alice Li, Associate Director

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