

Facial Masks - China - 2022

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This report looks at the following areas:

- Market overview and growth of China's facial mask market.
- Competitive landscape and new product trends in China's facial mask market.
- Usage change of different formats of facial masks.
- Association between format/texture and functionality of sheet masks.
- Advantages of rinse-off masks.
- Usage of facial masks during different seasons.
- Usage habits of facial masks.
- Attitudes towards facial masks.

With a high proportion of explorative users, diversity of product offerings is greatly appreciated in the facial mask category. According to the consumer data, 38% of surveyed consumers use facial masks with different functional benefits from the same brand. 24% use multiple types of facial masks (eg sheet masks, rinse-off masks, sleeping masks), and this behaviour is more significant among cosmetic surgery adopters (35%) and consumers with sensitive skin (27%). It is highly recommended that brands develop rich offerings with different targeting benefits and diverse formats to capture the needs of consumers.

According to NBS, retail sales of cosmetics grew at 7% during January and February, but fell -6.3% in March due to major COVID outbreaks. Facial masks will be severely impacted by logistics disruptions in major metropolitan cities under strict lockdown measures, which will possibly slow market growth in 2022. Furthermore, in a high-impact scenario where lockdown measures last 4-6 months, the facial masks market is threatened by the diminished consumer budget for facial masks and a more simplified skincare routine in the long term.

Since the market is highly competitive and diluted with miscellaneous brands taking up over 60% of sales value, some brands have been burdened with the price war, especially during online shopping festivals. This situation is common



"As consumers are explorative in the usage of facial masks, brands are suggested to offer facial masks of various formats to satisfy their needs under different skin conditions and of different target groups."

– Tina He, Research Analyst

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to sheet masks since basic hydration benefits are indistinguishable between competitors. As sheet masks are the most popular format used by over half of surveyed consumers, brands need to add more value to their sheet mask products, for example, using special sheet materials or specific sheet textures, which are believed to deliver better effects by 57% and 47% of surveyed consumers.

Sleeping masks and rinse-off masks rise above other non-traditional formats of facial masks (eg multi-step masks or freshly made masks), used by 38% and 31% of surveyed consumers. While convenience and flexibility are widely claimed in current products, opportunities lie in communicating the advantages of better absorption and therefore stronger efficacy, so as to compete with the traditional format of sheet masks and create new room for growth.

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