

Haircare - China - 2023

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- Market overview of China's haircare market
- Competitive landscape and new product trends in China's haircare market
- Consumers' usage of different types of haircare products and the change over last year
- Ideal price range for different types of haircare products
- Reasons for and features of consumption upgrade in the haircare market
- Consumers' interest in scalp care claims
- Consumers' behaviours and attitudes towards scalp care

In 2022, the concept of sensitive scalp stepped into the spotlight in China's haircare market. 41% of consumers diagnosed themselves as having a sensitive scalp, indicating a large consumer base for haircare products targeting sensitive scalp. Meanwhile, sensitive scalp consumers are active users of various kinds of haircare products. Thus, haircare products for sensitive scalp are not only limited to scalp care products but can also expand to other haircare segments.

During the COVID-19 outbreak, consumers paid more attention to total wellbeing and therefore spending priorities shifted towards personal care categories, including haircare. After the relaxation of COVID-19 prevention and control policies, consumers may refocus on beauty categories, such as facial skincare and colour cosmetics. Thus, brands need to promote the importance of haircare and secure a high spending priority for the category.

For the time being, haircare is the top category that consumers are willing to invest more in among all beauty and personal care categories. Meanwhile, consumers have expressed interest in haircare products with targeted benefits and skincare ingredients. Moreover, they are willing to expand their haircare routines to include more steps, such as scalp care.



"Consumers' high willingness to invest in haircare and their increasing awareness of scalp health will continue to drive the development of China's haircare market. Brands can cater to consumer needs with prestige offerings leveraging skincare ingredients and concepts."

– Jane Chai, Senior Research Analyst

Buy this report now

Visit store.mintel.com

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

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

EXECUTIVE SUMMARY

- **The market**
Figure 1: Best- and worst-case forecast of retail value of haircare market, China, 2017-27
- **Companies and brands**
Figure 2: Leading manufacturers' share in value sales of haircare market, China, 2021-22 (est)
- **The consumer**
- **41% of consumers have sensitive scalp**
Figure 3: Scalp type and sensitivity, 2022
- **Product usage steadily climb**
Figure 4: Haircare products used in the last six months, male, 2021 vs 2022
Figure 5: Haircare products used in the last six months, female, 2021 vs 2022
- **Hair care and scalp care products enjoy higher price ranges**
Figure 6: Price range, 2022
- **Women upgrade the overall haircare regimen; men explore haircare products**
Figure 7: Reasons for spending more, by gender, 2022
- **Specific product positionings are valuable to consumers**
Figure 8: Features willing to pay more for, 2022
- **Skincare claims gain popularity in scalp care**
Figure 9: Interested scalp care claims, 2022
- **Majority of consumers trust the effects of scalp care**
Figure 10: Attitudes towards scalp care results, 2022
- **What we think**

ISSUES AND INSIGHTS

- **Go premium with the help of skincare concepts**
Figure 11: Haircare products leveraging skincare ingredients, China, 2020-22
Figure 12: Night-time haircare products, US, 2021
- **Taking care of sensitive scalp goes beyond scalp care products**
Figure 13: Dry shampoo for sensitive scalp, Italy, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 14: Leave-in conditioner for sensitive scalp, Germany, 2022

MARKET SIZE AND FORECAST

- **Resilient growth under pressure**
Figure 15: Best- and worst-case forecast of retail value of haircare market, China, 2017-27

MARKET SEGMENTATION

Figure 16: Sales value and growth rate of total haircare market, by segment, 2018-22 (est)

MARKET FACTORS

- **Spending confidence dropped in 2022**
- **Stricter rules on anti-hair loss products**
- **Haircare enjoys high spending priority among BPC categories**
Figure 17: Changes in spending, 2022
- **The rise of professional hair salons promotes the development of haircare market**

MARKET SHARE

- **L'Oréal continued to gain market share**
Figure 18: Leading manufacturers' share in value sales of haircare market, China, 2021-22 (est)
Figure 19: Kérastase's new product launches, China, 2022
Figure 20: L'Oréal Professionnel's new product launches and new spokesperson, China, 2022
- **Shiseido transferred its Professional business to Henkel**
- **SLEK launched new brand SLEK PRO**
Figure 21: SLEK PRO's new product launches, China, 2022
- **Smaller brands also realised rosy performance**

MARKETING ACTIVITIES

- **Team up with O2O platforms**
Figure 22: Schwarzkopf's cooperation with O2O platforms, China, 2022
- **Promote multi-step haircare routines**
Figure 23: Dove's promotion of multi-step haircare routines, China, 2022
- **Reach target audience through cross-category cooperation**
Figure 24: Pantene's cooperation with naive blue, China, 2023

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

| | |
|----------|----------------------|
| Visit | store.mintel.com |
| 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 |

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

NEW PRODUCT TRENDS

- Convenient haircare solutions are emerging**
 Figure 25: Top growing claims in new shampoo launches, China, 2021-22
- Free-from claims gain popularity**
- Eco-friendly will become a mainstream topic**
 Figure 26: Examples of waterless haircare products, Canada and South Korea, 2021-22
- Sensitive scalp is a focus of the year**
 Figure 27: New product launches targeting sensitive scalp, China, 2022
- Scalp exfoliation/scrub products rise in the market**
 Figure 28: Examples of scalp exfoliation/scrub launches, South Korea and France, 2021-22
- Brightening/illuminating rebounded in 2022**
 Figure 29: Top growing claims in new conditioner and hair treatments launches, China, 2021-22
- Blurring boundaries with adjacent categories**
 Figure 30: New haircare launches blurring boundary with other BPC categories, South Korea, 2022

SCALP CONDITION

- 41% of respondents diagnosed themselves as having a sensitive scalp**
 Figure 31: Scalp type and sensitivity, total and by selected demographics, 2022
- Oily scalp and combination scalp are the majority**
 Figure 32: Scalp type and sensitivity, 2021 vs 2022
 Figure 33: Scalp type and sensitivity, by selected demographics, 2022

PRODUCT USAGE

- Men focused on shampoo; women had diversified choices**
 Figure 34: Number of types of haircare products used in the last six months, male, 2021 vs 2022
 Figure 35: Number of types of haircare products used in the last six months, female, 2021 vs 2022
 Figure 36: Haircare products used in the last six months, by gender, 2022
- Men used more shampoos and conditioners than in 2021**
 Figure 37: Haircare products used in the last six months, male, 2021 vs 2022
- Women continued to enrich their haircare repertoire**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

| | |
|----------|----------------------|
| Visit | store.mintel.com |
| 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 |

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 38: Haircare products used in the last six months, female, 2021 vs 2022

- **Consumers who have scalp sensitivity or combination scalp type have a more extensive product repertoire**

Figure 39: Number of types of haircare products used in the last six months, by scalp sensitivity, 2022

Figure 40: Haircare products used in the last six months, by scalp sensitivity, 2022

Figure 41: Number of types of haircare products used in the last six months, by scalp sensitivity, 2022

Figure 42: Haircare products used in the last six months, by scalp type, 2022

PRICE RANGE

- **Consumers are more willing to spend on hair care and scalp care products**

Figure 43: Price range, 2022

- **Price preference varies for shampoos and conditioners**

Figure 44: Price range, by gender, 2022

- **Under-25s and over-50s are more price-conscious**

Figure 45: Price range, by age, 2022

REASONS FOR SPENDING MORE

- **Women upgrade haircare regimen; men explore haircare products**

Figure 46: Changes in spending – ‘Haircare (a)’, total and by gender, 2022

Figure 47: Reasons for spending more, by gender, 2022

- **Affluent consumers are more willing to add steps in haircare routines than other income groups besides trading up to better products**

Figure 48: Reasons for spending more, by monthly personal income, 2022

- **Consumers who upgraded haircare products can accept higher price ranges**

Figure 49: Price range – consumers who ‘used more expensive shampoo/conditioner’ vs total, 2022

Figure 50: Price range – consumers who ‘used more expensive haircare/treatments’ vs total, 2022

Figure 51: Price range – consumers who ‘used more expensive scalp care products’ vs total, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

| | |
|----------|----------------------|
| Visit | store.mintel.com |
| 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 |

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

FEATURES WILLING TO PAY MORE FOR

- **A clear product positioning can add value to haircare products**
Figure 52: Features willing to pay more for, 2022
- **Haircare can ride on the skinification trend**
Figure 53: Turf analysis of features willing to pay more for, 2022
- **Women are more willing to pay for ingredients**
Figure 54: Features willing to pay more for, by gender, 2022
- **Ingredients trigger product upgrades**
Figure 55: Features willing to pay more for, by reasons for spending more, 2022

INTERESTED SCALP CARE CLAIMS

- **Scalp care is closely associated with the health of hair**
Figure 56: Interested scalp care claims, 2022
- **Taking care of the scalp at facial-care-level**
Figure 57: Turf analysis of interested scalp care claims, 2022
- **Moisturising and reducing itch benefits may trigger upgrades for scalp care products**
Figure 58: Interested scalp care claims, by reasons for spending more, 2022
- **Consumers in lower tier cities pay more attention to scalp sensitivity**
Figure 59: Interested scalp care claims, by city tier, 2022
- **Relieving sensitivity is a top priority for sensitive scalp consumers**
Figure 60: Interested scalp care claims, by scalp sensitivity, 2022
- **Scalp type has an impact on consumers' choices of scalp care products**
Figure 61: Interested scalp care claims, by scalp type, 2022

ATTITUDES TOWARD SCALP CARE

- **Consumers recognise the benefits of scalp care**
Figure 62: Attitudes towards scalp care results, total and by selected demographics, 2022
- **Unconvinced consumers still try scalp care products at the same level as believers**
Figure 63: Haircare products used in the last six months, by attitudes towards scalp care results, 2022
Figure 64: Kérastase's communication on scalp care products, China, 2022
- **Scalp care is still in exploratory stage**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

| | |
|----------|----------------------|
| Visit | store.mintel.com |
| 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 |

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Figure 65: Usage habit of scalp care products, 2022
- Figure 66: Motivation for using scalp care products, 2022
- Figure 67: Spending priority between haircare products and scalp care products, 2022

- **Scalp care services at hair salons do not cannibalise consumers' budgets for scalp care products**

- Figure 68: Place of conducting scalp care, 2022
- Figure 69: Haircare products used in the last six months, by place of conducting scalp care, 2022

BEAUTY PERSONAS

- **Who are they?**
- **Aggressive Apprentices are not big believers in scalp care; Beauty Mavens are scalp care activists**

- Figure 70: Attitudes towards scalp care results, by beauty persona, 2022
- Figure 71: Haircare products used in the last six months – 'scalp cleansers/treatments', by beauty persona, 2022
- Figure 72: Usage habit of scalp care products, by beauty persona, 2022

- **Beauty Mavens are willing to invest in haircare steps; Enthusiastic Experimenters love exploration**

- Figure 73: Reasons for spending more, by beauty persona, 2022

- **Beauty Mavens and Functionalists pay more for ingredients**

- Figure 74: Features willing to pay more for, by gender, by beauty persona, 2022

APPENDIX – MARKET SIZE AND FORECAST

- Figure 75: Market value of haircare, China, 2017-27

APPENDIX –METHODOLOGY AND ABBREVIATIONS

- **Consumer research methodology**
- **Abbreviations**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

| | |
|----------|----------------------|
| Visit | store.mintel.com |
| 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 |



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.