

December 2022

男性美容护理流程 - China

“形象觉醒练习生是形象管理漠视者与形象管理进阶者（本报告定义的消费者细分群体）之间的过渡阶段，品牌通过帮助形象觉醒练习生不断进阶的方式接触美容个护领域的不同男性，并一步步地增进其成熟度。在功效之外，情绪性益处或是在不同维度进一步激活男性市场的关键所在，在不远的将来或能有效推动‘他经济’的发展。”

——蒋亚利，美容个护品类副总监

November 2022

Suncare - China

“Consumers’ rising awareness of UV protection has sustained the market’s growth for another year. The rising popularity of outdoor activities is generating awareness of UV protection and providing an opportunity and pathway for sunscreen brands to engage with consumers. Meanwhile, the balance of sufficient protection and comfortable skin remain a ...

面部清洁和卸妆产品 - China

“2022年新冠疫情复燃后，更温和的产品成为消费者的首选，其次是更养肤或更保湿的产品；消费者对面部清洁和卸妆产品的需求相同。去年，卸妆油的渗透率小幅攀升，但仍有许多消费者受油性产品肤感油腻、会闷痘堵塞毛孔的刻板印象影响，不愿尝试此类产品。品牌在推广卸妆油时，除了清洁效果好和作用温和外，还应对产品质地进行生动的描述，并提供真实证据以佐证卸妆油对黑头和毛孔的改善作用。”

——柴静彦，研究分析师

October 2022

婴幼儿护理用品 - China

“在出生率下降和多数种类产品渗透率饱和的情况下，婴幼儿护理用品市场需针对新一代家长进行产品创新并做好品牌定位。具体而言，加码新兴品类（如防晒产品），推出新形态和新质地并专注于产品功效是释放市场潜能的关键。”

——何雨婷，研究分析师

Men's Grooming Routines - China

“With Awakening Apprentices being the connection between Self-image Indifferents and Image Management Veterans (consumer segments identified in this Report), brands could approach men in the BPC world following a progressive way and enhance their sophistication step by step. On top of efficacy, emotional benefits could be the key to further ...

Facial Cleanser and Makeup
Removal Products - China

“Milder products are sought most after the resurgence of COVID-19 in 2022, followed by those with better skincare benefits or with better moisturising results. The demands are the same for both facial cleansing products and makeup removal products. Makeup removal oil has obtained slight increasing usage penetration over the last ...

September 2022

Baby Personal Care - China

“Faced with a declining birth rate and saturation of most product types, the baby personal care market needs product innovation and brand positioning that speak to the new generations of parents. Specifically, weighing on emerging product types (eg sun care), introducing new formats and textures and focusing on product efficacy are ...

美容仪器 - China

“在经历了几年的快速增长后，美容仪器市场首次出现下滑，这反映了消费者对大额消费持保留态度，并且不愿意购买仅带有基础功能（如补水保湿或清洁等）的美容仪器。美容仪器品牌需要持续探索如何说服用户继续使用或改善当前用户的美容仪器使用体验，如利用配套护肤品增强功效。”

— 古丹阳，高级研究分析师

女士面部护肤品 - China

“在后疫情时代，高功效的面部护肤品将在女性的美容流程中占据更重要的位置，并有可能成为驱动美容行业未来增长的引擎。这是因为相邻品类持续引进“护肤化”概念，同时许多美容企业也更聚焦于面部护肤品业务。鉴于消费者将皮肤屏障受损与各种不同的皮肤问题联系在一起，并认为面部护肤品是首选解决方案，皮肤健康将成为推动面部护肤品进一步增长的强劲动力，皮肤屏障相关的产品定位也有潜力带来可观的投资回报率。然而，近未来，通过保护皮肤微生态以增强皮肤整体免疫力将成为更具吸引力的因素，因此品牌应预先制定方针。”

— 蒋亚利，美容个护品类副总监

Women's Facial Skincare - China

“Facial skincare with high efficacy will play a more central role in women's beauty routines in the post-pandemic era and will likely lead future growth in the beauty industry, given the skinification trend continues impacting adjacent categories and many beauty companies are focusing more on the facial skincare business.

Skin ...

August 2022

Beauty Devices - China

“After a few years' rapid growth, the market has recorded a decrease for the first time, reflecting consumers' reserved attitudes in making large spending and their reluctance in purchasing devices with basic functions such as hydration or cleansing. It is important for device brands to keep exploring ways to persuade ...

彩妆——面部 - China

“选择底妆产品时，消费者更注重妆效持久和贴合皮肤的宣称，这为起辅助作用的妆前乳/隔离霜和定妆产品带来发展机会。在满足服贴妆容要求的基础上，额外的护肤功效对于某些肤质的消费者（如干性或受损敏感性皮肤）可谓加分项，对成熟女性也具有吸引力。”

—— 靳尧婷，高级研究分析师

July 2022

Colour Cosmetics - Face - China

“Consumers are paying more attention to the long lasting and close fit to skin surface claim when choosing foundation products, which offers future growth opportunities for complimentary primer and setting products. On the premise of satisfying demand for the seamless makeup look, additional skincare benefits are a bonus for those ...

June 2022

对高端美容产品的态度 - China

“由于越来越多年轻消费者开始使用高端护肤品，品牌有必要迅速采取行动，推出更多样化的产品以及采用更多元的渠道策略，以更好地满足该群体对功效和感官体验的追求。此外，品牌也可针对急迫的社会问题发起讨论和举措，借此与消费者建立更坚实的情感联系。得益于新冠疫情，线上渠道进一步蓬勃发展，成为消费者搜集信息和购买产品的枢纽。然而，品牌专柜仍扮演着重要角色。品牌可通过该渠道提供试用用品吸引年轻消费者，以及通过服务和专业咨询赢得成熟女性的青睐。品牌可持续优化其线上和线下渠道的服务和促销策略，为消费者提供更轻松方便的无缝购物体验。”

面膜 - China

“由于消费者使用面膜时热衷探索，品牌可以考虑提供多种形式的面膜，以满足皮肤状况不同的消费者和不同目标群体的需求。就两种主流的面膜形式而言，独特材质的面膜纸可加成贴片式面膜的功效，而水洗涂抹式面膜可从吸收效果更好的角度来讲述功效。”

— 何雨婷，研究分析师

May 2022

Facial Masks - China

“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. For two leading formats, specialisation of sheet materials can endorse functionality of sheet masks, and rinse-off masks ...

April 2022

口腔护理 - China

“随着人们的口腔健康知识和意识不断提升，消费者在面临各种口腔问题时，将更多地选择自我治疗。同时，消费者已养成采用各种产品解决特定口腔问题的习惯，这将进一步强化市场细分，为口气清新喷雾和齿间刷等小众产品带来机会。口腔护理品牌可以利用这些机会，开发专业产品来满足消费者尚未得到满足的需求，并覆盖治疗后的护理和恢复等更多使用场景。”

— 柴静彦，研究分析师

Attitudes towards Prestige BPC Products - China

“Younger entry in the category becomes prevailing and brands are now required to act fast and dig deeper product offering diversifications and channels strategies to better accommodate younger consumers' needs on functional benefits and sensorial experience during use. Also lead the conversation and movement in tackling pressing social issues to ...

抗衰老产品 - China

“消费者采取全面的方案应对皮肤衰老。他们不仅用面部护肤品延缓衰老，还更加注重调整生活方式，以此作为另一大应对方案。因此，商家可以将产品定位为有助更健康生活方式的配套方案，并且对效力提供专业背书，从而吸引消费者关注。”

— 靳尧婷，高级研究分析师

Age Management Products - China

“Consumers are taking a holistic approach towards ageing skin. They are not only using facial skincare products to delay ageing but also pay more attention to lifestyle modification as another major treatment. Therefore, positioning products as complementary solutions that support a healthier lifestyle and proving their effectiveness with professional endorsements ...

March 2022

Oral Care - China

“With increasing knowledge and awareness of oral health, consumers will have more self-treatment occasions when encountering diversified dental problems. In the meantime, consumers have established a habit of using various products for specific oral issues, which will further enhance market segmentation and bring opportunities to niche prototypes such as breath ...

洗发护发产品 - China

“消费者对更好的洗护发解决方案的需求变得更加精细化，最终推动了高端化趋势和消费者使用数量的增加，进而拉动了中国洗发护发市场的增长。为了在未来继续保持增长，品牌需在洗发和护发领域满足消费者对精细化和便捷解决方案的多元化需求，比如护色/固色的洗护发产品和免洗型护发精油。”

— 蒋亚利，高级研究分析师

February 2022

Haircare - China

“Growth of China’s haircare market is driven by consumers’ fragmented needs for better haircare solutions, which eventually resulted in premiumisation and increased repertoire. In order to maintain future growth, brands need to serve consumers’ diverse needs for precise and convenient solutions both in shampoo and haircare segments such as colour ...

造型和染发用品 - China

“鉴于消费者在打理整体外观与造型风格时，对美发更为重视，染发用品市场将在未来5年保持增长态势。消费者更关注染发剂使用不便的问题，而非损伤头发或染发效果不佳，因此通过便于使用的产品驱动居家染发的渗透率是当下要务。”

过去一年，女性的美发造型产品使用率显著提升，因此该品类需改变其男性导向的形象，以迎合更多女性消费者的需求。除了打造专门的发型，美发造型产品可进一步融入护发功效，成为消费者日常头发护理流程的一部分。”

— 李玉梅，研究副总监

Hair Colourants and Styling Products - China

“As consumers pay more attention to hair beauty as part of their overall appearance and style, hair colourants will remain on an upward trend over the next five years. At this point, driving penetration of home hair colour with easy-to-use products is a priority in this category, as inconvenience has ...

美容零售 - China

“中国的零售格局持续发展，新玩家与新平台快速兴起。品牌需要有效地运营私域流量，为消费者提供个性化的产品推荐与实用的美容建议，并利用非美容类的信息满足消费者的情感需求，以此维持消费者兴趣并培育其品牌忠诚度。”

— 柴静彦，研究分析师

Beauty Retailing - China



Beauty and Personal Care - China

“China’s retailing landscape continues to evolve, with new players and platforms emerging quickly. Brands need to operate private domain traffic in an effective way, providing personalised product recommendations and practical beauty tips, and leveraging non-beauty information to cater to consumers’ emotional needs, so as to retain consumer interest and cultivate ...

Upcoming Reports

Personal Care Products during Pregnancy - China - 2022

孕期个人护理产品 - 中国 - 2022年

Soap, Bath and Shower Products - China - 2022

洗手洗浴用品 - 中国 - 2022年

防晒产品 - 中国 - 2022年