Beauty and Personal Care in China

EXECUTIVE SUMMARY
Beauty and personal care in 2022: The big picture
2022 key trends
Competitive landscape
Retailing developments
What next for beauty and personal care?

MARKET DATA
Table 1 - Sales of Beauty and Personal Care by Category: Value 2017-2022
Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2018-2022
Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2018-2022
Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2019-2022
Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2017-2022
Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2017-2022
Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2022
Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2022-2027
Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES
Summary 1 - Research Sources

Baby and Child-Specific Products in China

KEY DATA FINDINGS

2022 DEVELOPMENTS
Baby and child-specific products struggles with the spread of COVID-19
Polarised performances of online and offline channels in 2022
Sensitive skin remains one of the top concerns in baby and child-specific skin care

PROSPECTS AND OPPORTUNITIES
New regulation reshaping baby care
Safety and transparency will be the new winning formula

CATEGORY DATA
Table 11 - Sales of Baby and Child-specific Products by Category: Value 2017-2022
Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2017-2022
Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2017-2022
Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2018-2022
Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2019-2022
Table 16 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2019-2022
Table 17 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2019-2022
Table 18 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2019-2022
Table 19 - Forecast Sales of Baby and Child-specific Products by Category: Value 2022-2027
Table 20 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2022-2027
Table 21 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2022-2027

Bath and Shower in China

KEY DATA FINDINGS
2022 DEVELOPMENTS

Polarised effect of the pandemic on bath and shower
Liquid soap and hand sanitisers see growth due to the pandemic and lockdowns
Bar soap and body wash/shower gel decline during lockdowns

PROSPECTS AND OPPORTUNITIES

E-commerce to return to steady growth, while offline channels to recover temporarily
Bath and shower to experience polarised category growth with the lifting of lockdowns
Demand for sophisticated skin care will drive consumers to ingredient analysis

CATEGORY DATA

Table 22 - Sales of Bath and Shower by Category: Value 2017-2022
Table 23 - Sales of Bath and Shower by Category: % Value Growth 2017-2022
Table 24 - Sales of Bath and Shower by Premium vs Mass: % Value 2017-2022
Table 25 - NBO Company Shares of Bath and Shower: % Value 2018-2022
Table 26 - LBN Brand Shares of Bath and Shower: % Value 2019-2022
Table 27 - LBN Brand Shares of Premium Bath and Shower: % Value 2019-2022
Table 28 - Forecast Sales of Bath and Shower by Category: Value 2022-2027
Table 29 - Forecast Sales of Bath and Shower by Category: % Value Growth 2022-2027
Table 30 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2022-2027

Colour Cosmetics in China

KEY DATA FINDINGS

2022 DEVELOPMENTS

Colour cosmetics sees double-digit decline across all categories due to COVID-19
Both the premium and mass segments decline, while experiencing fiercer competition
Both the pandemic and technology accelerate the penetration of e-commerce

PROSPECTS AND OPPORTUNITIES

Domestic brands with better adaptation to trends will take more share
Offline experiences will receive more attention in the post-pandemic era
Nude and natural make-up is the new trend

CATEGORY DATA

Table 31 - Sales of Colour Cosmetics by Category: Value 2017-2022
Table 32 - Sales of Colour Cosmetics by Category: % Value Growth 2017-2022
Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2018-2022
Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2019-2022
Table 35 - LBN Brand Shares of Eye Make-up: % Value 2019-2022
Table 36 - LBN Brand Shares of Facial Make-up: % Value 2019-2022
Table 37 - LBN Brand Shares of Lip Products: % Value 2019-2022
Table 38 - LBN Brand Shares of Nail Products: % Value 2019-2022
Table 39 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2019-2022
Table 40 - Forecast Sales of Colour Cosmetics by Category: Value 2022-2027
Table 41 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2022-2027

Deodorants in China

KEY DATA FINDINGS

2022 DEVELOPMENTS

Deodorants sees a decline in 2022 due to the pandemic
Scents become the new selling point for deodorants

PROSPECTS AND OPPORTUNITIES
International brands will continue to lead deodorants
Female consumer group has huge potential

CATEGORY DATA
Table 42 - Sales of Deodorants by Category: Value 2017-2022
Table 43 - Sales of Deodorants by Category: % Value Growth 2017-2022
Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2017-2022
Table 45 - NBO Company Shares of Deodorants: % Value 2018-2022
Table 46 - LBN Brand Shares of Deodorants: % Value 2019-2022
Table 47 - Forecast Sales of Deodorants by Category: Value 2022-2027
Table 48 - Forecast Sales of Deodorants by Category: % Value Growth 2022-2027
Table 49 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2022-2027

Depilatories in China

KEY DATA FINDINGS
2022 DEVELOPMENTS
Depilatories witnesses decline in 2022, due to the pandemic and lockdowns
Women’s razors and blades manages to grow even after a spike in 2021

PROSPECTS AND OPPORTUNITIES
Capitalising on the e-commerce boom – opportunities for depilatories brands
Depilatories set to experience robust growth after the lifting of lockdowns

CATEGORY DATA
Table 50 - Sales of Depilatories by Category: Value 2017-2022
Table 51 - Sales of Depilatories by Category: % Value Growth 2017-2022
Table 52 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2018-2022
Table 53 - NBO Company Shares of Depilatories: % Value 2018-2022
Table 54 - LBN Brand Shares of Depilatories: % Value 2019-2022
Table 55 - Forecast Sales of Depilatories by Category: Value 2022-2027
Table 56 - Forecast Sales of Depilatories by Category: % Value Growth 2022-2027

Fragrances in China

KEY DATA FINDINGS
2022 DEVELOPMENTS
Fragrances still holds potential despite increasing maturity
The de-gendering of both commercial and salon fragrances is evident
Online tactics are a breakthrough in brand marketing for fragrances

PROSPECTS AND OPPORTUNITIES
Local brands will leverage traditional Chinese elements to develop in fragrances
Demand for fragrances becomes more refined, and per capita consumption is on the rise

CATEGORY DATA
Table 57 - Sales of Fragrances by Category: Value 2017-2022
Table 58 - Sales of Fragrances by Category: % Value Growth 2017-2022
Table 59 - NBO Company Shares of Fragrances: % Value 2018-2022
Table 60 - LBN Brand Shares of Fragrances: % Value 2019-2022
Hair Care in China

KEY DATA FINDINGS

2022 DEVELOPMENTS
Hair care declines for the first time in a decade as a result of the pandemic
Declining demand during lockdowns affects standard shampoos
Conditioners and treatments remains static due to polarised demand in the mass and premium segments

PROSPECTS AND OPPORTUNITIES
E-commerce will return to steady growth, while offline retailing expected to boom
Hair loss will continue to be a pain point that drives sales of hair care products
Driven by demand for functionality, skinification will keep developing alongside premiumisation

CATEGORY DATA
Table 65 - Sales of Hair Care by Category: Value 2017-2022
Table 66 - Sales of Hair Care by Category: % Value Growth 2017-2022
Table 67 - Sales of Hair Care by Premium vs Mass: % Value 2017-2022
Table 68 - NBO Company Shares of Hair Care: % Value 2018-2022
Table 69 - NBO Company Shares of Salon Professional Hair Care: % Value 2018-2022
Table 70 - LBN Brand Shares of Hair Care: % Value 2019-2022
Table 71 - LBN Brand Shares of Colourants: % Value 2019-2022
Table 72 - LBN Brand Shares of Salon Professional Hair Care: % Value 2019-2022
Table 73 - LBN Brand Shares of Styling Agents: % Value 2019-2022
Table 74 - LBN Brand Shares of Premium Hair Care: % Value 2019-2022
Table 75 - Forecast Sales of Hair Care by Category: Value 2022-2027
Table 76 - Forecast Sales of Hair Care by Category: % Value Growth 2022-2027
Table 77 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2022-2027

Men's Grooming in China

KEY DATA FINDINGS

2022 DEVELOPMENTS
Product differentiation is key in men’s skin care
Men's shaving experiences a decline due to lockdowns

PROSPECTS AND OPPORTUNITIES
Education and innovation needed to further boost adoption of men’s fragrances
Men’s bath and shower expected to regain its popularity after the lifting of lockdowns

CATEGORY DATA
Table 78 - Sales of Men's Grooming by Category: Value 2017-2022
Table 79 - Sales of Men's Grooming by Category: % Value Growth 2017-2022
Table 80 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2019-2022
Table 81 - Sales of Men's Skin Care by Type: % Value Breakdown 2019-2022
Table 82 - NBO Company Shares of Men's Grooming: % Value 2018-2022
Table 83 - LBN Brand Shares of Men's Grooming: % Value 2019-2022
Table 84 - LBN Brand Shares of Men's Razors and Blades: % Value 2019-2022
Oral Care in China

KEY DATA FINDINGS

2022 DEVELOPMENTS

Oral care succumbs to the resurgence of COVID-19 cases and resultant restrictions
Mouthwashes/dental rinses sees sales slump in 2022
Premiumisation of oral care driven by online channels

PROSPECTS AND OPPORTUNITIES

Children’s oral care keeps gaining traction
Demand for antiseptic products set to persist in the post-COVID-19 period

CATEGORY DATA

Table 87 - Sales of Oral Care by Category: Value 2017-2022
Table 88 - Sales of Oral Care by Category: % Value Growth 2017-2022
Table 89 - Sales of Toothbrushes by Category: Value 2017-2022
Table 90 - Sales of Toothbrushes by Category: % Value Growth 2017-2022
Table 91 - Sales of Toothpaste by Type: % Value Breakdown 2018-2022
Table 92 - NBO Company Shares of Oral Care: % Value 2018-2022
Table 93 - LBN Brand Shares of Oral Care: % Value 2019-2022
Table 94 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2019-2022
Table 95 - LBN Brand Shares of Toothpaste: % Value 2019-2022
Table 96 - Forecast Sales of Oral Care by Category: Value 2022-2027
Table 97 - Forecast Sales of Oral Care by Category: % Value Growth 2022-2027
Table 98 - Forecast Sales of Toothbrushes by Category: Value 2022-2027
Table 99 - Forecast Sales of Toothbrushes by Category: % Value Growth 2022-2027

Skin Care in China

KEY DATA FINDINGS

2022 DEVELOPMENTS

Due to the pandemic, skin care sees a halt to the growth trend over the past few years
Deepening polarisation in skin care, with increasing competition between premium and mass products
Dermocosmetics flourishes, with the focus on repairing and soothing

PROSPECTS AND OPPORTUNITIES

Natural and herbal ingredients gain popularity
Live-streaming becomes more important in traffic distribution
Domestic brands set to continue to grow and capture sales

CATEGORY DATA

Table 100 - Sales of Skin Care by Category: Value 2017-2022
Table 101 - Sales of Skin Care by Category: % Value Growth 2017-2022
Table 102 - NBO Company Shares of Skin Care: % Value 2018-2022
Table 103 - LBN Brand Shares of Skin Care: % Value 2019-2022
Table 104 - LBN Brand Shares of Basic Moisturisers: % Value 2019-2022
Table 105 - LBN Brand Shares of Anti-agers: % Value 2019-2022
Table 106 - LBN Brand Shares of Firming/Anti-cellulite Body Care: % Value 2019-2022
Table 107 - LBN Brand Shares of General Purpose Body Care: % Value 2019-2022
KEY DATA FINDINGS

2022 DEVELOPMENTS
Sun care suffers from the resurgence of COVID-19
Unsettled sun protection category, due to intensifying competition
Added value is the winning solution for sun care players amidst the pandemic

PROSPECTS AND OPPORTUNITIES
Return to outdoor activities set to unlock potential for sun care
Popularity of physical sun protection items could pose a challenge to sun protection

CATEGORY DATA
Table 111 - Sales of Sun Care by Category: Value 2017-2022
Table 112 - Sales of Sun Care by Category: % Value Growth 2017-2022
Table 113 - NBO Company Shares of Sun Care: % Value 2018-2022
Table 114 - LBN Brand Shares of Sun Care: % Value 2019-2022
Table 115 - LBN Brand Shares of Premium Adult Sun Care: % Value 2019-2022
Table 116 - Forecast Sales of Sun Care by Category: Value 2022-2027
Table 117 - Forecast Sales of Sun Care by Category: % Value Growth 2022-2027

Premium Beauty and Personal Care in China

KEY DATA FINDINGS

2022 DEVELOPMENTS
Premium beauty and personal care is more stable compared with the mass segment
Premium sun protection leads the growth of sun care

PROSPECTS AND OPPORTUNITIES
Premium skin care will undergo continuous product upgrades
Premium fragrances actively seek online marketing
Driven by demand for functionality, skinification will keep developing alongside premiumisation

CATEGORY DATA
Table 118 - Sales of Premium Beauty and Personal Care by Category: Value 2017-2022
Table 119 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 120 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2018-2022
Table 121 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2019-2022
Table 122 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2022-2027
Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2022-2027

Mass Beauty and Personal Care in China

KEY DATA FINDINGS

2022 DEVELOPMENTS
Mass hair care continues to experience a premiumisation trend in 2022
The competitive landscape in mass colour cosmetics is intense
PROSPECTS AND OPPORTUNITIES

Mass skin care to face more competition from premium brands
Slow CAGR for mass bath and shower in China in the post-pandemic period

CATEGORY DATA

Table 124 - Sales of Mass Beauty and Personal Care by Category: Value 2017-2022
Table 125 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 126 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2018-2022
Table 127 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2019-2022
Table 128 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2022-2027
Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2022-2027

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings**: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles**: Analysis dedicated to the world’s most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports**: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.