Beauty and Personal Care in Hong Kong, China

June 2023

Table of Contents
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

KEY DATA FINDINGS

2022 DEVELOPMENTS

Rising penetration of Japanese brands within baby and child-specific products
Local pharmacies emerge as new distribution channel
Social selling emerges as a powerful growth driver

PROSPECTS AND OPPORTUNITIES

Eczema remains leading concern for baby and child-specific skin care
Growth to be boosted by availability of international products
Exhibitions provide opportunities for brand growth and customer acquisition

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 Premium Baby and Child-specific Products: % Value 2019-2022
Table 18 - Forecast Sales of Baby and Child-specific Products by Category: Value 2022-2027
Table 19 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2022-2027
Table 20 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2022-2027

Bath and Shower in Hong Kong, China

KEY DATA FINDINGS
2022 DEVELOPMENTS

Skin care-inspired ingredients drive growth in bath and shower
Demand for hand sanitisers shifts to smaller sizes and scented options as pandemic eases
Premiumisation in bath and shower driven by aromatherapy offerings

PROSPECTS AND OPPORTUNITIES

Foaming format of liquid soap is on the rise
Natural and clean bath and shower products expected to attract consumers' attention

CATEGORY DATA

Table 21 - Sales of Bath and Shower by Category: Value 2017-2022
Table 22 - Sales of Bath and Shower by Category: % Value Growth 2017-2022
Table 23 - Sales of Bath and Shower by Premium vs Mass: % Value 2017-2022
Table 24 - NBO Company Shares of Bath and Shower: % Value 2018-2022
Table 25 - LBN Brand Shares of Bath and Shower: % Value 2019-2022
Table 26 - LBN Brand Shares of Premium Bath and Shower: % Value 2019-2022
Table 27 - Forecast Sales of Bath and Shower by Category: Value 2022-2027
Table 28 - Forecast Sales of Bath and Shower by Category: % Value Growth 2022-2027
Table 29 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2022-2027

Colour Cosmetics in Hong Kong, China

KEY DATA FINDINGS

2022 DEVELOPMENTS

Navigating a challenging year amid the pandemic
“Skinimalism” within colour cosmetics is gaining momentum
Social media has a major influence on colour cosmetics in Hong Kong

PROSPECTS AND OPPORTUNITIES

Colour cosmetics poised for a significant resurgence with border reopening
The return of liquid lipstick
Colour cosmetics with skin care benefits continue to gain traction

CATEGORY DATA

Table 30 - Sales of Colour Cosmetics by Category: Value 2017-2022
Table 31 - Sales of Colour Cosmetics by Category: % Value Growth 2017-2022
Table 32 - NBO Company Shares of Colour Cosmetics: % Value 2018-2022
Table 33 - LBN Brand Shares of Colour Cosmetics: % Value 2019-2022
Table 34 - LBN Brand Shares of Eye Make-up: % Value 2019-2022
Table 35 - LBN Brand Shares of Facial Make-up: % Value 2019-2022
Table 36 - LBN Brand Shares of Lip Products: % Value 2019-2022
Table 37 - LBN Brand Shares of Nail Products: % Value 2019-2022
Table 38 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2019-2022
Table 39 - Forecast Sales of Colour Cosmetics by Category: Value 2022-2027
Table 40 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2022-2027

Deodorants in Hong Kong, China

KEY DATA FINDINGS

2022 DEVELOPMENTS

Deodorant sprays continues to drive value sales
Exercise habits help drive growth of deodorants in 2022
Fragrance emerges as one of the most significant need states in deodorants

PROSPECTS AND OPPORTUNITIES
Natural ingredient formulations expand into deodorants
Deodorant roll-ons gain attention due to convenience and portability, driven by increasing popularity of exercise and active lifestyles

CATEGORY DATA
Table 41 - Sales of Deodorants by Category: Value 2017-2022
Table 42 - Sales of Deodorants by Category: % Value Growth 2017-2022
Table 43 - Sales of Deodorants by Premium vs Mass: % Value 2017-2022
Table 44 - NBO Company Shares of Deodorants: % Value 2018-2022
Table 45 - LBN Brand Shares of Deodorants: % Value 2019-2022
Table 46 - LBN Brand Shares of Premium 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 Hong Kong, China

KEY DATA FINDINGS

2022 DEVELOPMENTS
Modest value sales growth for depilatories in 2022
Demand for women’s pre-shave remains sluggish

PROSPECTS AND OPPORTUNITIES
Depilatories expected to decline as salon services gain in popularity
Influx of Japanese products likely to gain share from existing players

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 Hong Kong, China

KEY DATA FINDINGS

2022 DEVELOPMENTS
Fragrances records robust performance, driven by premium segment
Brands ramp up marketing efforts to strengthen consumer awareness
Demand for fragrances with a wellness positioning continues to grow

PROSPECTS AND OPPORTUNITIES
Rising demand for natural and sustainable fragrances
Consumers seek fragrances that resonate with their values and lifestyles
Fragrance brands launch travel sets to meet the needs of consumers on the go

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
Table 61 - LBN Brand Shares of Premium Men's Fragrances: % Value 2019-2022
Table 62 - LBN Brand Shares of Premium Women's Fragrances: % Value 2019-2022
Table 63 - Forecast Sales of Fragrances by Category: Value 2022-2027
Table 64 - Forecast Sales of Fragrances by Category: % Value Growth 2022-2027

Hair Care in Hong Kong, China

KEY DATA FINDINGS

2022 DEVELOPMENTS

The skinification trend in local hair care
Players identify huge potential in hair loss treatments, as wider availability of products evident in local market
The rising interest in aromatherapy as pandemic boosts self-care rituals

PROSPECTS AND OPPORTUNITIES

Premiumisation will further drive hair care sales over the forecast period
Clean hair care using natural ingredients expected to gain further momentum
Colourants with treatment formulations help brands to differentiate in fragmented landscape

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 Hong Kong, China

KEY DATA FINDINGS

2022 DEVELOPMENTS

Men's grooming driven by greater focus on health and wellness, and mobility outside of the home
Brands are expanding product offerings that target the male demographic
Men's hair loss treatments experience surge in demand

PROSPECTS AND OPPORTUNITIES

Continuous growth driven by increasing demand for men's hair care, shaving, and deodorants
Barbershops expected to facilitate product discovery and drive sales growth
Education is the key to capturing local consumers

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
KEY DATA FINDINGS

2022 DEVELOPMENTS

Enhanced oral care routines continue to drive value growth in 2022
Localisation through celebrity endorsements
The rise of the “lipstick effect” in oral care

PROSPECTS AND OPPORTUNITIES

Mouthwashes and whitening products offer growth potential, boosted by the lifting of mask mandates
Electric toothbrushes to further rise in popularity

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 Hong Kong, China

KEY DATA FINDINGS

2022 DEVELOPMENTS

Consumers increasingly informed and aware of skin care ingredients
Pore control experiences surge in demand due to mask mandates in 2022
Beauty brands use celebrity endorsement to tap into different target audiences

PROSPECTS AND OPPORTUNITIES

The rise of clean beauty in skin care
Younger consumers with growing awareness of anti-agers as prevention
Sustainability will continue to strongly influence skin care in Hong Kong

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 Men's Razors and Blades: % Value 2019-2022
Table 105 - Forecast Sales of Men's Grooming by Category: Value 2022-2027
Table 106 - Forecast Sales of Men's Grooming by Category: % Value Growth 2022-2027

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
Table 85 - Forecast Sales of Men’s Grooming by Category: Value 2022-2027
Table 86 - Forecast Sales of Men’s Grooming by Category: % Value Growth 2022-2027

Table 81 - Sales of Men's Skin Care by Type: % Value Breakdown 2019-2022
Sun Care in Hong Kong, China

KEY DATA FINDINGS

2022 DEVELOPMENTS
Sun care experiences further decline in 2022
Increasing availability of multifunctional sun care products
Continuous consumer education needed to drive demand for sun care

PROSPECTS AND OPPORTUNITIES
Demand for convenient on-the-go formats expected to grow
Specialised sun care for targeted protection expected to gain in popularity

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 Hong Kong, China

KEY DATA FINDINGS

2022 DEVELOPMENTS
Consumers prioritise science-backed skin care solutions and become increasingly knowledgeable about ingredients
Expanding product portfolios to widen potential consumer reach
Brands embrace digital tools to engage with younger generations

PROSPECTS AND OPPORTUNITIES
Local consumers seek multifunctional products
Beauty tech and experiential retail are driving the seamless omnichannel experience
Travel spending is a major threat to local retailers

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
2022 DEVELOPMENTS
Further investment by retailers in private label driven by uncertain climate
New entrants add to the already fragmented landscape
Rise of local beauty brands

PROSPECTS AND OPPORTUNITIES
Competitiveness likely to intensify over the forecast period
Recovery hinges on the return of tourists from Mainland China
Demand for mass fragrances expected to remain sluggish

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, focusing 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.