

## Facial Skincare - China - August 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

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



“Consumers think basic product benefits like hydrating and whitening are the most important signals when they are evaluating product effectiveness. Safety assurance, like no irritation, no side effect, are also the things every brand must get right. Advanced functional benefits (eg firming, plumping) are areas of differentiation brands can build against rivals.”

- **Jessica Jin, Associate Director of Research**

This report looks at the following areas:

- Chinese brands win back appreciation
- Learnings from niche brands
- KOLs impact more on trend pursuers, but less on savvy users

Consumers' usage of facial skincare products is changing vs 2016. Women are increasing usage penetration across all product types as well as facial cleanser device. However, male grooming seems to be struggling to grow as Mintel research actually identifies lower usage penetration on most products. Despite the mixed stories, consumers' willingness to take better care of their skin and product premiumisation will continue to drive the total market value in 2017.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://store.mintel.com)

**CALL:**  
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

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

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

# Facial Skincare - China - August 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

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

## Table of Contents

### Overview

What you need to know

Covered in this Report

Included in the consumer survey:

Included in market size:

### Executive Summary

The market

Figure 1: Best- and worst-case forecast of total value sales of facial skincare market, China, 2012-22

Companies and brands

Figure 2: Market share of top facial skincare companies, China, 2015 and 2016

The consumer

Women use more products while men use fewer

Figure 3: Product usage, female, 2017 vs 2016

Figure 4: Product usage, male, 2017 vs 2016

Chinese brands are in their ascent to become the most often used skincare brands

Figure 5: Country of brand used most often, female, 2017 vs 2016

Most willing to pay more for serum and eye cream

Figure 6: Price tier, female, April 2017

Why people buy niche brands

Figure 7: Usage habit, April 2017

Hydration, the most felt usage cue of product effectiveness

Figure 8: Features of an effective product, April 2017

Friends are still the most influential source of advice

Figure 9: Influencer, by gender, April 2017

What we think

### Issues and Insights

Chinese brands win back appreciation

The facts

The implications

Figure 10: Pechoin advertisement of 1931, China, 2017

Learnings from niche brands

The facts

The implications

Figure 11: The Ordinary products, 2017

KOLs impact more on trend pursuers, but less on savvy users

The facts

The implications

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** 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 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Facial Skincare - China - August 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

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

## The Market – What You Need to Know

Positive growth surpassing overall BPC

Not lacking momentum

## Market Size and Forecast

A winning sector in BPC

Figure 12: Best- and worst-case forecast of total value sales of facial skincare market, China, 2012-22

## Market Drivers

Great attention to self-appearance

Preparing for more extreme weathers

Figure 13: National highest temperature during July 5-24, China, 2017

Fiercer competition results in speedy new launches

## Key Players – What You Need to Know

Rise of domestic companies

More brands featuring natural ingredients joining competition

China market expedites innovation speed

## Market Share

Overall changes of market key players

Figure 14: Market share of top facial skincare companies, China, 2015 and 2016

Premium lines secure the performance of international brands

Shiseido

AmorePacific

Chinese brands benefit from strong hero products, marketing support and competitive prices

Pehchaolin

Chicmax

## Competitive Strategies

Feature natural ingredients

Figure 15: Cha Ling, 2017

Figure 16: WASO, 2017

Riding on buzz

Figure 17: Collaboration between L'Oréal and Mobike, China, 2017

Figure 18: SK-II 'The Expiry Date' campaign, China, 2017

## Who's Innovating?

China vs developed markets

Figure 19: Launch type in new facial skincare launches, by China, South Korea, Japan, US and UK, 2016-June 2017

Figure 20: Top claims in new facial skincare launches, by China, South Korea, Japan, US and UK, 2016-June 2017

Trends in the China market

Figure 21: Top claims in new facial skincare launches, China, 2015 and 2016

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** 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 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Facial Skincare - China - August 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

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

Figure 22: Price positioning in new facial skincare launches, China, 2015 and 2016

Innovations worth knowing

Hydrating with micro capsules

Figure 23: Facial skincare products with micro capsules, Japan, South Korea and China, 2017

Sun sticks and sunscreen cushions emerge

Figure 24: Sun stick, South Korea, 2017

Figure 25: Sunscreen cushion, South Korea, 2017

Multi-use products for time saving

Figure 26: Multi-use facial skincare product, Japan, 2016-17

Texture transformation

Figure 27: Facial skincare products with texture transformation, China, 2017

Seasonal offering with cooling sensation

Figure 28: Summer seasonal facial skincare products with cooling sensation, Japan, 2017

Colourful skincare products for fun

Figure 29: Innisfree color clay mask, South Korea, 2017

Figure 30: Outrun color sunstick, South Korea, 2017

### The Consumer – What You Need to Know

Women involved deeper in the category while men lay back

Chinese brands take over the leading position from Korean brands in 2017

Women over 30 pay more on skincare products than younger consumers

Well-known brands own reputation but also face the risk of losing users

Basic benefits and safety matter most

Friends' advice outweighs that of KOLs

### Product Usage

Females use 6.7 product types while males use 1.7 types on average

Figure 31: Product usage, by gender, April 2017

Females aged 30-39 use fewer products

Figure 32: Product usage, female, by age, April 2017

Females opt for more types of skincare products as well as devices than in 2016

Figure 33: Product usage, female, 2017 vs 2016

Males have not stepped further beyond cleaning vs 2016

Figure 34: Product usage, male, 2017 vs 2016

### Country of Brand Used Most Often

Chinese brands exceed Korean brands

Figure 35: Country of brand used most often, female, 2017 vs 2016

Particularly males are big fans of Chinese brands

Figure 36: Country of brand used most often, by gender, April 2017

Females' favour of Korean brands does not fade with increasing income levels like that of Chinese brands

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** 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 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Facial Skincare - China - August 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

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

Figure 37: Country of brand used most often, by gender and monthly personal income, April 2017

### Price Tier

Nearly 40% of female users claim to use prestige facial/eye essences

Figure 38: Price tier, female, April 2017

Females in their 30s are more willing to invest in facial skincare than other people

Figure 39: Price tier, female, by age, April 2017

### Usage Habit

About a fifth of consumers concerned more about emerging skincare condition

Figure 40: Usage habit, female, by monthly personal income, April 2017

More trend followers in 25-29s

Figure 41: Usage habit, female, by age, April 2017

Well-known brands are more appealing but loyalty is a challenge

Figure 42: Usage habit, female, by age, April 2017

Attitudes of niche brand fans

Figure 43: Usage habit, by brand preference, April 2017

### Features of an Effective Product

Hydrating sensation dials up efficacy perception

Figure 44: Features of an effective product, April 2017

Figure 45: Selected consumer verbatim, April 2017

Fresh feeling is especially important for men

Figure 46: Top features of an effective product, by gender, April 2017

### Influencer

Males: doctors/dermatologists after friends

Figure 47: Influencer, by gender, April 2017

Women in early twenties more influenced by bloggers than other groups

Figure 48: Influencer, female, by age, April 2017

Affluent women: confident to make their own call

Figure 49: Influencer, female, by monthly personal income, April 2017

Who influences bestsellers pursuers?

Figure 50: Influencer, consumers who prefer using bestsellers vs consumers who prefer using the product suitable for my skin condition (as benchmark), April 2017

### Meet the Mintropolitans

Suncare is a more essential product for MinTs

Figure 51: Product usage, by consumer classification, April 2017

Chinese brands winning MinTs as well

Figure 52: Country of brand used most often, by consumer classification, April 2017

### Appendix – Market Size and Forecast

Figure 53: Total value sales of facial skincare market, China, 2012-22

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** 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 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Facial Skincare - China - August 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

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

### Appendix – Word Cloud in Mandarin

Figure 54: Features of an effective product, word cloud in Mandarin, April 2017

### Appendix – Methodology and Abbreviations

Methodology

Fan chart forecast

Abbreviations

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** 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 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)