

# Beauty and Personal Care in China

May 2025

**Table of Contents** 

# Beauty and Personal Care in China

# **EXECUTIVE SUMMARY**

Beauty and personal care in 2024: The big picture

2024 key trends

Competitive landscape

Retail developments

What next for beauty and personal care?

# MARKET DATA

- Table 1 Sales of Beauty and Personal Care by Category: Value 2019-2024
- Table 2 Sales of Beauty and Personal Care by Category: % Value Growth 2019-2024
- Table 3 GBO Company Shares of Beauty and Personal Care: % Value 2020-2024
- Table 4 NBO Company Shares of Beauty and Personal Care: % Value 2020-2024
- Table 5 LBN Brand Shares of Beauty and Personal Care: % Value 2021-2024
- Table 6 Penetration of Private Label in Beauty and Personal Care by Category: % Value 2019-2024
- Table 7 Distribution of Beauty and Personal Care by Format: % Value 2019-2024
- Table 8 Distribution of Beauty and Personal Care by Format and Category: % Value 2024
- Table 9 Forecast Sales of Beauty and Personal Care by Category: Value 2024-2029
- Table 10 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2024-2029

## **DISCLAIMER**

# SOURCES

Summary 1 - Research Sources

# Baby and Child-Specific Products in China

# **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Segmentation rises in the largest category, baby and child-specific sun care

The top two players maintain dynamic growth

Retail e-commerce becomes dominant, at the expense of mother and baby stores

# PROSPECTS AND OPPORTUNITIES

Growth will come from premiumisation, as volume sales set to remain stable

Innovation and marketing likely to drive domestic brands to new heights

Stricter standards will push safety to the forefront of innovation in baby and child-specific products

# CATEGORY DATA

- Table 11 Sales of Baby and Child-specific Products by Category: Value 2019-2024
- Table 12 Sales of Baby and Child-specific Products by Category: % Value Growth 2019-2024
- Table 13 Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2019-2024
- Table 14 NBO Company Shares of Baby and Child-specific Products: % Value 2020-2024
- Table 15 LBN Brand Shares of Baby and Child-specific Products: % Value 2021-2024
- Table 16 LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2021-2024
- Table 17 LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2021-2024
- Table 18 LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2021-2024
- Table 19 Forecast Sales of Baby and Child-specific Products by Category: Value 2024-2029
- Table 20 Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2024-2029
- Table 21 Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2024-2029

# Bath and Shower in China

# **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Cautious, rational purchasing behaviour contributes to decline

Procter & Gamble maintains its rising trend, while Guangzhou Blue Moon excels

The rise of retail e-commerce seems unstoppable

# PROSPECTS AND OPPORTUNITIES

Price competition and falling population expected to have a negative impact

Fragrance, sustainability, and multifunctional innovation to impact category evolution

The rise of bath and shower sets: How bundling boosts sales

# **CATEGORY DATA**

- Table 22 Sales of Bath and Shower by Category: Value 2019-2024
- Table 23 Sales of Bath and Shower by Category: % Value Growth 2019-2024
- Table 24 Sales of Bath and Shower by Premium vs Mass: % Value 2019-2024
- Table 25 NBO Company Shares of Bath and Shower: % Value 2020-2024
- Table 26 LBN Brand Shares of Bath and Shower: % Value 2021-2024
- Table 27 LBN Brand Shares of Premium Bath and Shower: % Value 2021-2024
- Table 28 Forecast Sales of Bath and Shower by Category: Value 2024-2029
- Table 29 Forecast Sales of Bath and Shower by Category: % Value Growth 2024-2029
- Table 30 Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2024-2029

# Colour Cosmetics in China

# **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Facial make-up bucks the declining trend, as a good base for make-up is essential

L'Oréal loses share to domestic players such as Proya Cosmetics

Although retail e-commerce dominance is unshakeable, some offline channels see strong growth

# PROSPECTS AND OPPORTUNITIES

Consumers will continue to appreciate facial make-up, especially make-up primer

Mass colour cosmetics set to drive growth as consumers downgrade

Multifunctionality and natural radiance will be areas of innovation

# **CATEGORY DATA**

- Table 31 Sales of Colour Cosmetics by Category: Value 2019-2024
- Table 32 Sales of Colour Cosmetics by Category: % Value Growth 2019-2024
- Table 33 NBO Company Shares of Colour Cosmetics: % Value 2020-2024
- Table 34 LBN Brand Shares of Colour Cosmetics: % Value 2021-2024
- Table 35 LBN Brand Shares of Eye Make-up: % Value 2021-2024
- Table 36 LBN Brand Shares of Facial Make-up: % Value 2021-2024
- Table 37 LBN Brand Shares of Lip Products: % Value 2021-2024
- Table 38 LBN Brand Shares of Nail Products: % Value 2021-2024
- Table 39 LBN Brand Shares of Premium Colour Cosmetics: % Value 2021-2024
- Table 40 Forecast Sales of Colour Cosmetics by Category: Value 2024-2029
- Table 41 Forecast Sales of Colour Cosmetics by Category: % Value Growth 2024-2029

# Deodorants in China

# KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Slow growth for a small category

Increasing fragmentation as the share of the smallest players sees growth

Although warehouse clubs rises, retail e-commerce continues to dominate

# PROSPECTS AND OPPORTUNITIES

Skin care expected to be increasingly incorporated in deodorants

Children's deodorants likely to offer growth opportunities

Trend towards fragrance-inspired deodorants anticipated

# **CATEGORY DATA**

Table 42 - Sales of Deodorants by Category: Value 2019-2024

Table 43 - Sales of Deodorants by Category: % Value Growth 2019-2024

Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2019-2024

Table 45 - NBO Company Shares of Deodorants: % Value 2020-2024

Table 46 - LBN Brand Shares of Deodorants: % Value 2021-2024

Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2021-2024

Table 48 - Forecast Sales of Deodorants by Category: Value 2024-2029

Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2024-2029

Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2024-2029

# Depilatories in China

# **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Women's razors and blades performs well, at the expense of hair removers/bleaches

Leading player Schick also sees the strongest growth

Retail e-commerce offers the widest product range

# PROSPECTS AND OPPORTUNITIES

Demand for high-quality products will continue to rise, driving value growth

Skin care expected to be a more important element in new products

Segmentation expected to increase in depilatories

# **CATEGORY DATA**

Table 51 - Sales of Depilatories by Category: Value 2019-2024

Table 52 - Sales of Depilatories by Category: % Value Growth 2019-2024

Table 53 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2020-2024

Table 54 - NBO Company Shares of Depilatories: % Value 2020-2024

Table 55 - LBN Brand Shares of Depilatories: % Value 2021-2024

Table 56 - Forecast Sales of Depilatories by Category: Value 2024-2029

Table 57 - Forecast Sales of Depilatories by Category: % Value Growth 2024-2029

# Fragrances in China

# **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Premium unisex fragrances bucks the declining trend

Parfums Christian Dior takes the lead, while players in premium unisex fragrances perform well

Department stores maintains its distribution lead due to the desire for offline experiences

# PROSPECTS AND OPPORTUNITIES

Premium fragrances set to increase its dominance

Challenges and opportunities for fragrances in China

Understated fragrances and smaller sizes likely to perform well

# **CATEGORY DATA**

- Table 58 Sales of Fragrances by Category: Value 2019-2024
- Table 59 Sales of Fragrances by Category: % Value Growth 2019-2024
- Table 60 NBO Company Shares of Fragrances: % Value 2020-2024
- Table 61 LBN Brand Shares of Fragrances: % Value 2021-2024
- Table 62 LBN Brand Shares of Premium Men's Fragrances: % Value 2021-2024
- Table 63 LBN Brand Shares of Premium Women's Fragrances: % Value 2021-2024
- Table 64 Forecast Sales of Fragrances by Category: Value 2024-2029
- Table 65 Forecast Sales of Fragrances by Category: % Value Growth 2024-2029

# Hair Care in China

# **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Challenge from less frequent hair washing, but opportunities remain

Procter & Gamble maintains its strong lead, despite a falling share

Try-on features, sample sizes, and increase in repeat purchases drive sales via retail e-commerce, in addition to pricing and convenience

#### PROSPECTS AND OPPORTUNITIES

Strong growth opportunities for salon professional hair care

China's hair care evolution: Blending channels, experiences and commerce

Eco-conscious and culturally rooted: A new era for hair care in China

# **CATEGORY DATA**

- Table 66 Sales of Hair Care by Category: Value 2019-2024
- Table 67 Sales of Hair Care by Category: % Value Growth 2019-2024
- Table 68 Sales of Hair Care by Premium vs Mass: % Value 2019-2024
- Table 69 NBO Company Shares of Hair Care: % Value 2020-2024
- Table 70 NBO Company Shares of Salon Professional Hair Care: % Value 2020-2024
- Table 71 LBN Brand Shares of Hair Care: % Value 2021-2024
- Table 72 LBN Brand Shares of Colourants: % Value 2021-2024
- Table 73 LBN Brand Shares of Salon Professional Hair Care: % Value 2021-2024
- Table 74 LBN Brand Shares of Styling Agents: % Value 2021-2024
- Table 75 LBN Brand Shares of Premium Hair Care: % Value 2021-2024
- Table 76 Forecast Sales of Hair Care by Category: Value 2024-2029
- Table 77 Forecast Sales of Hair Care by Category: % Value Growth 2024-2029
- Table 78 Forecast Sales of Hair Care by Premium vs Mass: % Value 2024-2029

# Men's Grooming in China

# KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Value decline across many categories as consumers trade down Marketing helps Guangzhou Mizi Cosmetics see exceptional growth

Retail e-commerce continues to take share from offline channels

# PROSPECTS AND OPPORTUNITIES

Men likely to remain cautious in their purchases

Local brands likely to leverage social commerce for growth

Innovation and technology will contribute to growth in men's grooming

#### CATEGORY DATA

- Table 79 Sales of Men's Grooming by Category: Value 2019-2024
- Table 80 Sales of Men's Grooming by Category: % Value Growth 2019-2024
- Table 81 Sales of Men's Razors and Blades by Type: % Value Breakdown 2021-2024
- Table 82 Sales of Men's Skin Care by Type: % Value Breakdown 2021-2024
- Table 83 NBO Company Shares of Men's Grooming: % Value 2020-2024
- Table 84 LBN Brand Shares of Men's Grooming: % Value 2021-2024
- Table 85 LBN Brand Shares of Men's Razors and Blades: % Value 2021-2024
- Table 86 Forecast Sales of Men's Grooming by Category: Value 2024-2029
- Table 87 Forecast Sales of Men's Grooming by Category: % Value Growth 2024-2029

#### Oral Care in China

#### **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Toothpaste sees premiumisation, which drives value growth

Smaller brands in toothpaste perform well, and uSmile outperforms in power toothbrushes

Dynamic growth for warehouse clubs, as Sam's Club expands in China

# PROSPECTS AND OPPORTUNITIES

Consistent slow growth for oral care as demand expands beyond toothpaste and manual toothbrushes

Toothpaste in China shifts toward specialisation and professional care

uSmile launches U7 Pro - a smart toothbrush offering precision and personalisation

# **CATEGORY DATA**

- Table 88 Sales of Oral Care by Category: Value 2019-2024
- Table 89 Sales of Oral Care by Category: % Value Growth 2019-2024
- Table 90 Sales of Toothbrushes by Category: Value 2019-2024
- Table 91 Sales of Toothbrushes by Category: % Value Growth 2019-2024
- Table 92 Sales of Toothpaste by Type: % Value Breakdown 2020-2024
- Table 93 NBO Company Shares of Oral Care: % Value 2020-2024
- Table 94 LBN Brand Shares of Oral Care: % Value 2021-2024
- Table 95 LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2021-2024
- Table 96 LBN Brand Shares of Toothpaste: % Value 2021-2024
- Table 97 Forecast Sales of Oral Care by Category: Value 2024-2029
- Table 98 Forecast Sales of Oral Care by Category: % Value Growth 2024-2029
- Table 99 Forecast Sales of Toothbrushes by Category: Value 2024-2029
- Table 100 Forecast Sales of Toothbrushes by Category: % Value Growth 2024-2029

# Skin Care in China

# **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Maturity and lower consumer confidence drive value decline, but pockets of growth remain

Proya Cosmetics takes advantage of its understanding of local consumers

Warehouse clubs and retail e-commerce take share from most other distribution channels in skin care

# PROSPECTS AND OPPORTUNITIES

Lip care set to see the strongest growth as more people look for a good base for applying lip products

Creating emotional bonds will be important for creating customer loyalty

Fusion of ingredients from traditional Chinese medicine, and skin care science

#### CATEGORY DATA

Table 101 - Sales of Skin Care by Category: Value 2019-2024

Table 102 - Sales of Skin Care by Category: % Value Growth 2019-2024

Table 103 - NBO Company Shares of Skin Care: % Value 2020-2024

Table 104 - LBN Brand Shares of Skin Care: % Value 2021-2024

Table 105 - LBN Brand Shares of Basic Moisturisers: % Value 2021-2024

Table 106 - LBN Brand Shares of Anti-agers: % Value 2021-2024

Table 107 - LBN Brand Shares of Firming Body Care: % Value 2021-2024

Table 108 - LBN Brand Shares of General Purpose Body Care: % Value 2021-2024

Table 109 - LBN Brand Shares of Premium Skin Care: % Value 2021-2024

Table 110 - Forecast Sales of Skin Care by Category: Value 2024-2029

Table 111 - Forecast Sales of Skin Care by Category: % Value Growth 2024-2029

#### Sun Care in China

# **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Adult sun care continues to dominate, but baby and child-specific sun care leads growth as awareness rises Leading player L'Oréal performs well, but smaller players rise strongly from a low base Popularity of retail e-commerce drives a move away from some offline retailers, although others perform well

# PROSPECTS AND OPPORTUNITIES

Despite challenges, sun care is set to see solid value growth Consumers will seek additional benefits from sun care products New practical formats to shape sun care moving forward

# **CATEGORY DATA**

Table 112 - Sales of Sun Care by Category: Value 2019-2024

Table 113 - Sales of Sun Care by Category: % Value Growth 2019-2024

Table 114 - NBO Company Shares of Sun Care: % Value 2020-2024

Table 115 - LBN Brand Shares of Sun Care: % Value 2021-2024

Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2021-2024

Table 117 - Forecast Sales of Sun Care by Category: Value 2024-2029

Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2024-2029

# Premium Beauty and Personal Care in China

# **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Declining sales, driven by search for more affordable alternatives during economic downturn

L'Oréal extends its share despite challenges in the market

A core consumer base continues to value premium beauty and personal care products

# PROSPECTS AND OPPORTUNITIES

With demand for improved hair quality, premium hair care is set to see a strong rise

Potential for premiumisation in baby and child-specific products

Innovations such as customised and natural products likely to be seen

# **CATEGORY DATA**

Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2019-2024

Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2019-2024

Table 121 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2020-2024

Table 122 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2021-2024

Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2024-2029

Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2024-2029

# Mass Beauty and Personal Care in China

# **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Skin care maintains its lead, but suffers from maturity and economic situation

Proya Cosmetics maintains its rising trend due to innovation and quality

Price sensitivity leads to downgrading within the mass segment, and from premium to mass

# PROSPECTS AND OPPORTUNITIES

More positive consumer sentiment will drive a return to value growth

Al set to move further into mass beauty and personal care

Local ingredients and multifunctional products are two strands of innovation

## **CATEGORY DATA**

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2019-2024

Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2019-2024

Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2020-2024

Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2021-2024

Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2024-2029

Table 130 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2024-2029

# 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 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.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/beauty-and-personal-care-in-china/report.