

Beauty and Personal Care in Hong Kong, China

May 2024

Table of Contents

Beauty and Personal Care in Hong Kong, China

EXECUTIVE SUMMARY

Beauty and personal care in 2023: The big picture

2023 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 2018-2023

Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2019-2023

Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2019-2023

Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2020-2023

Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2018-2023

Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2018-2023

Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2023

Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2023-2028

Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in Hong Kong, China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sensitive skin remains one of the leading concerns for local parents

Rising awareness of importance of sun protection

Dominance of offline purchases in baby and child-specific products

PROSPECTS AND OPPORTUNITIES

Premium international brands tap into baby and child-specific products

Product safety will remain a priority for parents

CATEGORY DATA

Table 11 - Sales of Baby and Child-specific Products by Category: Value 2018-2023

Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2018-2023

Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2018-2023

Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2019-2023

Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2020-2023

Table 16 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2020-2023

Table 17 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2020-2023

Table 18 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2020-2023

Table 19 - Forecast Sales of Baby and Child-specific Products by Category: Value 2023-2028

Table 20 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2023-2028

Table 21 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2023-2028

Bath and Shower in Hong Kong, China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumer demand for bath and shower becomes increasingly sophisticated
Natural and clean products gain popularity
Offline retail experience remains prevalent for bath and shower in Hong Kong

PROSPECTS AND OPPORTUNITIES

Premium bath and shower products on the rise
Rising awareness of intimate hygiene in Hong Kong

CATEGORY DATA

Table 22 - Sales of Bath and Shower by Category: Value 2018-2023
Table 23 - Sales of Bath and Shower by Category: % Value Growth 2018-2023
Table 24 - Sales of Bath and Shower by Premium vs Mass: % Value 2018-2023
Table 25 - NBO Company Shares of Bath and Shower: % Value 2019-2023
Table 26 - LBN Brand Shares of Bath and Shower: % Value 2020-2023
Table 27 - LBN Brand Shares of Premium Bath and Shower: % Value 2020-2023
Table 28 - Forecast Sales of Bath and Shower by Category: Value 2023-2028
Table 29 - Forecast Sales of Bath and Shower by Category: % Value Growth 2023-2028
Table 30 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2023-2028

Colour Cosmetics in Hong Kong, China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Return of tourism and social occasions drives growth of colour cosmetics
Offline experience regains importance for brand discovery and trials
Continuous fragmentation of colour cosmetics in both premium and mass segments

PROSPECTS AND OPPORTUNITIES

Further blurring of lines between skin care, colour cosmetics and sun care expected
Omnichannel strategy is key as offline presence remains important for decision-making

CATEGORY DATA

Table 31 - Sales of Colour Cosmetics by Category: Value 2018-2023
Table 32 - Sales of Colour Cosmetics by Category: % Value Growth 2018-2023
Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2019-2023
Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2020-2023
Table 35 - LBN Brand Shares of Eye Make-up: % Value 2020-2023
Table 36 - LBN Brand Shares of Facial Make-up: % Value 2020-2023
Table 37 - LBN Brand Shares of Lip Products: % Value 2020-2023
Table 38 - LBN Brand Shares of Nail Products: % Value 2020-2023
Table 39 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2020-2023
Table 40 - Forecast Sales of Colour Cosmetics by Category: Value 2023-2028
Table 41 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2023-2028

Deodorants in Hong Kong, China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising popularity of deodorant sticks and roll-ons due to convenience and portability
Retail offline regains share of deodorant distribution from e-commerce

PROSPECTS AND OPPORTUNITIES

Deodorants featuring natural ingredients to gain greater popularity
Premium brands enter deodorants with signature scents

CATEGORY DATA

- Table 42 - Sales of Deodorants by Category: Value 2018-2023
- Table 43 - Sales of Deodorants by Category: % Value Growth 2018-2023
- Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2018-2023
- Table 45 - NBO Company Shares of Deodorants: % Value 2019-2023
- Table 46 - LBN Brand Shares of Deodorants: % Value 2020-2023
- Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2020-2023
- Table 48 - Forecast Sales of Deodorants by Category: Value 2023-2028
- Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2023-2028
- Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2023-2028

Depilatories in Hong Kong, China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Depilatories experiences positive sales with resumption of social lives
Safety and low irritation remain key factors behind purchasing decisions

PROSPECTS AND OPPORTUNITIES

Demand for depilatories expected to remain steady over forecast period
Offline sales dominate distribution due to greater convenience

CATEGORY DATA

- Table 51 - Sales of Depilatories by Category: Value 2018-2023
- Table 52 - Sales of Depilatories by Category: % Value Growth 2018-2023
- Table 53 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2019-2023
- Table 54 - NBO Company Shares of Depilatories: % Value 2019-2023
- Table 55 - LBN Brand Shares of Depilatories: % Value 2020-2023
- Table 56 - Forecast Sales of Depilatories by Category: Value 2023-2028
- Table 57 - Forecast Sales of Depilatories by Category: % Value Growth 2023-2028

Fragrances in Hong Kong, China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Dynamic growth of fragrances driven by premium segment
Consumers seek unique and personalised sensory experiences
Offline presence remains essential for fragrances

PROSPECTS AND OPPORTUNITIES

Unisex fragrances on the rise in Hong Kong
An extension of usage scenarios for fragrances
Sustainable fragrance packaging

CATEGORY DATA

- Table 58 - Sales of Fragrances by Category: Value 2018-2023
- Table 59 - Sales of Fragrances by Category: % Value Growth 2018-2023
- Table 60 - NBO Company Shares of Fragrances: % Value 2019-2023
- Table 61 - LBN Brand Shares of Fragrances: % Value 2020-2023

- Table 62 - LBN Brand Shares of Premium Men's Fragrances: % Value 2020-2023
- Table 63 - LBN Brand Shares of Premium Women's Fragrances: % Value 2020-2023
- Table 64 - Forecast Sales of Fragrances by Category: Value 2023-2028
- Table 65 - Forecast Sales of Fragrances by Category: % Value Growth 2023-2028

Hair Care in Hong Kong, China

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Incorporation of natural ingredients into hair care
- Increase in private label offerings
- Increasing penetration of Japanese colourants

PROSPECTS AND OPPORTUNITIES

- Growing potential for salon professional hair care
- Skinification trend expected to inform product innovation going forward

CATEGORY DATA

- Table 66 - Sales of Hair Care by Category: Value 2018-2023
- Table 67 - Sales of Hair Care by Category: % Value Growth 2018-2023
- Table 68 - Sales of Hair Care by Premium vs Mass: % Value 2018-2023
- Table 69 - NBO Company Shares of Hair Care: % Value 2019-2023
- Table 70 - NBO Company Shares of Salon Professional Hair Care: % Value 2019-2023
- Table 71 - LBN Brand Shares of Hair Care: % Value 2020-2023
- Table 72 - LBN Brand Shares of Colourants: % Value 2020-2023
- Table 73 - LBN Brand Shares of Salon Professional Hair Care: % Value 2020-2023
- Table 74 - LBN Brand Shares of Styling Agents: % Value 2020-2023
- Table 75 - LBN Brand Shares of Premium Hair Care: % Value 2020-2023
- Table 76 - Forecast Sales of Hair Care by Category: Value 2023-2028
- Table 77 - Forecast Sales of Hair Care by Category: % Value Growth 2023-2028
- Table 78 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2023-2028

Men's Grooming in Hong Kong, China

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Men's skin care and fragrances as growth drivers in 2023
- Men's shaving maintains steady growth with habitual purchases despite limited product development
- Men's hair care enjoys increasing attention in Hong Kong

PROSPECTS AND OPPORTUNITIES

- Men's skin care as white space set to be significant growth driver for men's grooming
- Men's shaving and fragrances expected to maintain growth due to rising awareness of self-care and grooming
- E-commerce set to remain important touchpoint and channel for men's grooming

CATEGORY DATA

- Table 79 - Sales of Men's Grooming by Category: Value 2018-2023
- Table 80 - Sales of Men's Grooming by Category: % Value Growth 2018-2023
- Table 81 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2020-2023
- Table 82 - Sales of Men's Skin Care by Type: % Value Breakdown 2020-2023
- Table 83 - NBO Company Shares of Men's Grooming: % Value 2019-2023
- Table 84 - LBN Brand Shares of Men's Grooming: % Value 2020-2023

Table 85 - LBN Brand Shares of Men's Razors and Blades: % Value 2020-2023

Table 86 - Forecast Sales of Men's Grooming by Category: Value 2023-2028

Table 87 - Forecast Sales of Men's Grooming by Category: % Value Growth 2023-2028

Oral Care in Hong Kong, China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Addressing sensitivity and repair solutions remain key factors for toothpaste

Growing momentum for mouthwashes and whitening toothpaste

PROSPECTS AND OPPORTUNITIES

Government restrictions on plastic to impact dental floss

Continuous innovation for eco-friendly oral care options

CATEGORY DATA

Table 88 - Sales of Oral Care by Category: Value 2018-2023

Table 89 - Sales of Oral Care by Category: % Value Growth 2018-2023

Table 90 - Sales of Toothbrushes by Category: Value 2018-2023

Table 91 - Sales of Toothbrushes by Category: % Value Growth 2018-2023

Table 92 - Sales of Toothpaste by Type: % Value Breakdown 2019-2023

Table 93 - NBO Company Shares of Oral Care: % Value 2019-2023

Table 94 - LBN Brand Shares of Oral Care: % Value 2020-2023

Table 95 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2020-2023

Table 96 - LBN Brand Shares of Toothpaste: % Value 2020-2023

Table 97 - Forecast Sales of Oral Care by Category: Value 2023-2028

Table 98 - Forecast Sales of Oral Care by Category: % Value Growth 2023-2028

Table 99 - Forecast Sales of Toothbrushes by Category: Value 2023-2028

Table 100 - Forecast Sales of Toothbrushes by Category: % Value Growth 2023-2028

Skin Care in Hong Kong, China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Tourism helps drive growth as premium skin care benefits the most

Local brands gain significance and drive offline presence

Skin care sets/kits remain key to attracting value-conscious consumers

PROSPECTS AND OPPORTUNITIES

Tourism to drive recovery and growth over forecast period

Private label and local brands to gain greater significance

Holistic beauty to drive product innovation to differentiate

CATEGORY DATA

Table 101 - Sales of Skin Care by Category: Value 2018-2023

Table 102 - Sales of Skin Care by Category: % Value Growth 2018-2023

Table 103 - NBO Company Shares of Skin Care: % Value 2019-2023

Table 104 - LBN Brand Shares of Skin Care: % Value 2020-2023

Table 105 - LBN Brand Shares of Basic Moisturisers: % Value 2020-2023

Table 106 - LBN Brand Shares of Anti-agers: % Value 2020-2023

Table 107 - LBN Brand Shares of Firming Body Care: % Value 2020-2023

Table 108 - LBN Brand Shares of General Purpose Body Care: % Value 2020-2023

Table 109 - LBN Brand Shares of Premium Skin Care: % Value 2020-2023

Table 110 - Forecast Sales of Skin Care by Category: Value 2023-2028

Table 111 - Forecast Sales of Skin Care by Category: % Value Growth 2023-2028

Sun Care in Hong Kong, China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Outbound travel drives up demand for sun protection in 2023

Mass sun care gains growth momentum

Multifunctionality remains key product innovation

PROSPECTS AND OPPORTUNITIES

Continuous fragmentation of sun care, driven by blurred lines with other categories

Physical sun protection to retain a preference among local consumers

New sun protection formats to be driven by skinification trend

CATEGORY DATA

Table 112 - Sales of Sun Care by Category: Value 2018-2023

Table 113 - Sales of Sun Care by Category: % Value Growth 2018-2023

Table 114 - NBO Company Shares of Sun Care: % Value 2019-2023

Table 115 - LBN Brand Shares of Sun Care: % Value 2020-2023

Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2020-2023

Table 117 - Forecast Sales of Sun Care by Category: Value 2023-2028

Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2023-2028

Premium Beauty and Personal Care in Hong Kong, China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Tourism recovery supports dynamic growth of premium beauty and personal care

Premium fragrances maintains traction

Diminishing offline presence due to department stores closing

PROSPECTS AND OPPORTUNITIES

Healthy growth expected due to inbound tourism and strong local appetite for quality and premium beauty and personal care

Brand days and large-scale promotional activities to remain as key growth drivers

Building loyalty as a differentiator is expected

CATEGORY DATA

Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2018-2023

Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 121 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2019-2023

Table 122 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2020-2023

Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2023-2028

Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2023-2028

Mass Beauty and Personal Care in Hong Kong, China

KEY DATA FINDINGS

2023 DEVELOPMENTS

Return of tourist expenditure drives growth in mass segment

Rising presence of private label appeals to value-conscious consumers

Building brand awareness and loyalty to differentiate

PROSPECTS AND OPPORTUNITIES

Ingredients innovation and efficacy continue as main differentiators moving forward

Private label's significance expected to increase

CATEGORY DATA

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2018-2023

Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2019-2023

Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2020-2023

Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2023-2028

Table 130 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2023-2028

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.

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