

ATTITUDE TOWARDS EDIBLE BEAUTY – CHINA – 2023

In the realm of edible beauty, patience and alignment with consumer beliefs are key. Brands must craft innovations that resonate with what consumers already trust, emphasising efficacy and lifestyle integration, to make ingredients and concepts the true ambassadors of 'beauty from within'.



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Attitude Towards Edible Beauty - China - 2023

This report looks at the following areas:

- *Key market factors influencing the edible beauty market.*
- *Innovative marketing activities and new product trends.*
- *Current usage and future interest in using different beauty treatments.*
- *Product preference by different beauty functions.*
- *Edible beauty purchase considerations and preferred usage occasions.*
- *Edible beauty format preference.*
- *Edible beauty ingredient perceptions.*

Overview

Over the last five years, edible beauty new product launches in the China market have been limited; with it being the 17th biggest market across the globe.

From the consumer perspective, one of the biggest threats in the edible beauty market right now is that mass-market consumers' perceived importance of using edible beauty products is not yet in shape. Also, effectiveness plays an important role in existing users and future tryers' product selection journey.



In the realm of edible beauty, patience and alignment with consumer beliefs are key. Brands must craft innovations that resonate with what consumers already trust, emphasising efficacy and lifestyle integration, to make ingredients and concepts the true ambassadors of 'beauty from within'.

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With this in mind, effective edible beauty product development at this moment should allow the new products to match consumers' established perceptions. In terms of retaining users and future tryers' interest to stick with the category, edible beauty brands need to bring more innovation related to effectiveness upgrade to stay relevant and stand out.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Definitions
- Overview

The market

- Market factors
- Key trends in marketing activities
- New product trends
- Product examples illustrating these trends

The consumer

- Edible beauty products receive growing opportunity
 - Graph 1: ways to beauty, 2023
- Product usage occasion is highly linked to poor lifestyle compensation
 - Graph 2: edible beauty usage occasions, 2023
- Effective ingredients being easy to absorb influences purchase decision the most
 - Graph 3: purchase considerations, 2023
- Edible beauty that works in synergy with topical beauty is promising
 - Graph 4: product preference on each function, 2023
- Drinkable formats are most appealing to consumers
 - Graph 5: format preference, 2023
- Cutting-edge ingredients haven't heard of is a norm
 - Graph 6: ingredient perceptions, 2023

Issues and insights

What we think

THE MARKET

Market factors

- The beauty supplement market is still not of a large scale
 - Graph 7: online* value sales of health food/dietary and nutritional supplements vs edible beauty**, Jan-Nov 2023
- In addition to early-stage consumer awareness, high product price may be another reason hindering penetration and growth

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- Graph 8: online* average product price of Health Food/dietary and nutritional supplements vs edible beauty**, Jan-Nov 2023

- Industry standards are limited and are not yet sound

Marketing activities

- Combining with health concepts rooted in cultural beliefs to foster relevant image
- Anchoring specific usage occasions
- 'Infusion' became an interesting marketing term in edible beauty positioning
- A ground-breaking special variety of natural foods that deliver beauty benefits

New product trends

- New product launches in China are relatively limited
 - Graph 9: top 20 markets' share of global new product launches of food*, drink and dietary supplements with beauty benefits**, 2019-23
- Antioxidant and functional skin/nails/hair claims are predominant
 - Graph 10: share of selected claims related to beauty in food*, drink and dietary supplements, 2019-23
 - Graph 11: share of selected claims related to beauty in food*, drink and dietary supplements, 2019-23
- Chinese nourishing formula is trending in China
- China market could learn the innovations that target more segmented inner beauty benefits from South Korea
- Vitamin C and niacinamide are mainstream while grapeseed is emerging
 - Graph 12: share of selected ingredients in new food*, drink and dietary supplements with beauty benefits**, 2019-23
- Health supplements are innovating with premium ingredients targeting healthy ageing
- Focusing on increasing absorption
- Product formats becoming more diverse
 - Graph 13: share of formats in new food*, drink and dietary supplements with beauty benefits**, 2019-23
- Group medicine-like formats together in one product for an upscaled effectiveness
- Don't underestimate formats that highlight sensorial experience

THE CONSUMER

Ways to beauty

- The most acknowledged beauty treatment is developing a healthier lifestyle
 - Graph 14: ways to beauty, 2023
- Beauty treatment usage adhesion is strong
- A variety of beauty treatments occupy the 'opportunity area'
 - Graph 15: usage satisfaction rate (a) and future interest rate (b) of different ways to beauty (c), 2023
- Future interest rate of food, drink and supplements with beauty benefits is higher in young generations
 - Graph 16: future interest (a) in trying edible beauty products, by monthly personal income, 2023
 - Graph 17: future interest (a) in trying edible beauty products, by generation, 2023

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Edible beauty usage occasions

- Edible beauty can be more successful in finding a voice in sleep management
 - Graph 18: edible beauty usage occasions, 2023
- Young to early middle age groups opt for different 'punk health' style of usage occasions
 - Graph 19: edible beauty usage occasions, by age, 2023
- Now: coupling with daily skincare routine is beneficial to all edible beauty players to maintain existing consumers
 - Graph 20: percentage point difference between existing users and future tryers (a) in edible beauty usage occasions among each edible beauty product type, 2023
- Future: targeting menopause and don't forget the existence of andropause
 - Graph 21: percentage point difference (a) in the usage occasion of 'when menopausal symptoms begin to occur' between three types of edible beauty users and tryers, by gender and age, 2023

Product preference on each function

- 'Topical only' is mainstream, 'synergy' is promising, 'edible only' is emerging
 - Graph 22: product preference on each function, 2023
- Hormone, hair and scalp health are more welcomed by edible beauty core consumers
- Late middle-aged group is more attracted to edible beauty that targets scalp health
 - Graph 23: preference on eating food/drink/health supplement products with beauty benefits for scalp health improvement, by age, 2023
- Talking about a specific beauty benefit is critical to gather users to edible beauty and 'ingest and apply' concept
 - Graph 24: product preference on functions – repertoire analysis per edible beauty product type, % of consumers, 2023
- 'Hobbies' can be viewed as a beauty practice that facilitates cross-category integration of edible and topical beauty
 - Graph 25: most important (1st rank) self-improving area, 2023
 - Graph 26: product preference on functions – repertoire analysis on 'use both', by most important (1st rank) self-improving area, 2023

Purchase considerations

- Effective ingredients being easy-to-absorb wins over consumers, especially females
 - Graph 27: purchase considerations, 2023
- Onset of effectiveness is key to attract young groups
 - Graph 28: purchase considerations, by age, 2023
- High-tech materials and high-concentration effective ingredients create more usage adhesion
 - Graph 29: purchase considerations, by edible beauty product (a) existing users/lapsed users/ future tryers, 2023
- Overseas brands have more advantage to regain lapsed consumers
 - Graph 30: purchase considerations (from overseas brands), by edible beauty product (a) existing users/lapsed users/ future tryers, 2023

Format preference

- Drinkable formats are most appealing

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- Graph 31: format preference, 2023
- Younger adults are more interested in fun formats
 - Graph 32: format preference, by age, 2023
- Different format has its unique 'followers' across different edible beauty sub-categories
 - Graph 33: percentage point difference between existing users and future tryers (a) in format preference for each edible beauty product type, 2023
- Hormone management tends to be more compatible to various formats
 - Graph 34: format preference calculated by percentage point difference to average response, by respondents who would like to achieve beauty benefits via eating food/drink/health supplement products with beauty benefits, 2023

Ingredient perceptions

- Vitamins, probiotics and collagen are most familiar edible beauty ingredients
 - Graph 35: ingredient perceptions, 2023
- HA's effectiveness perception reaches a peak when people hit their 40s
 - Graph 36: effectiveness perception on edible beauty ingredients, by age, 2023
- Highlighting probiotics' effectiveness will entice male consumers
 - Graph 37: effectiveness perception on edible beauty ingredients, by gender, 2023
- Lapsed consumers have their eyes on the naturalness spectrum of various ingredients
 - Graph 38: naturalness perception on edible beauty ingredients, total vs those who have taken but will not continue to take edible beauty products (a), 2023

ISSUES AND INSIGHTS

Chinese nourishment ingredients could serve as synergists to support product efficacy

- Beauty has roots in traditional Chinese nourishment
- Examples of edible beauty products that incorporate the traditional Chinese nourishment theories
- Chinese nourishing ingredients could find their role serving as synergists

Grapeseed's secondary value hitting brands to evolve grapeseed concept products

- Grapeseed and astaxanthin witnessed high market value growth
 - Graph 39: online* value sales shares and YOY growth of selected ingredients in edible beauty**, Jan-Nov 2023
- Naturalness becomes grapeseed's most acknowledged secondary value in edible beauty racetrack
- Grapeseed can leverage its naturalness positioning to jump out of the medicinal formats

Anti-ageing is promising to venture into 'ingest plus apply' product development

- 'Ingest plus apply' product innovation is promising in anti-ageing function
- Examples of 'ingest plus apply' sets that tackle specific skin ageing symptoms via external and internal factor narratives
- 'Anti-ageing spiritually' should be considered if 'ingest plus apply' products move to holistic age management
 - Graph 40: signs of ageing, 2022

APPENDIX – METHODOLOGY AND ABBREVIATIONS

- Methodology
- Abbreviations

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