

MEN'S GROOMING ROUTINES – CHINA – 2024

The skincare focus is on high-efficacy products and exploring the potential of repairing benefits, with cleansers emphasising sensory experiences; in colour cosmetics, gender-neutral products can be used as an entry point to increase usage rates, followed by the development of products for men.



Jane Chai, Senior Analyst,
China Insights



Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Definition
- What you need to know

The market

- Value sales may continue to decline as consumers spend more cautiously
- Market factors: low consumer motivation despite the hype

Companies and brands

- Men's facial skincare market is increasingly concentrated
- Marketing activities: build connections, seek differences and create demand
- New product trends: growth in advanced benefits such as oil control and anti-ageing
 - Graph 1: popular claims for new men's facial skincare products, 2020-24
- Examples of products that reflect these trends

The consumer

- Female decision-makers play an important role in the men's grooming market
 - Graph 2: purchase decision maker, 2024
- Male consumers are most concerned about ageing, dull complexion and other skin disorders
- More than half of the respondents use facial skincare, cleansing or sun care products
 - Graph 3: usage of BPC products, 2024
- 'For men' is more popular in fragrances, facial cleansing and hair styling products
 - Graph 4: preferred product type, 2024
- Development of core categories in the men's grooming market and their main users
- When choosing cleansers, mildness is as important as cleaning power
 - Graph 5: consideration factors for facial cleansers, 2024
- Preference for the benefits of serums/essences: repair, spot removal and firming
 - Graph 6: preferred products for different skincare benefits, 2024
- Colour lasting power and smudge are men's top makeup concerns
 - Graph 7: makeup pain points, 2024

Issues and insights

What we think

- Concept Generator: what's next, as imagined by AI

THE MARKET

Market size and forecast

- Weak consumer motivation has led the market to shrink
 - Graph 8: men's facial skincare market value sales and growth rate, 2019-24 (est)
 - Graph 9: value sales of the men's facial skincare market relative to the women's facial skincare market, 2019-24 (est)
- Value-for-money and practicality will become mainstream, and long-term development faces challenges

Market factors

- Clothing and makeup styles reflect men's aesthetics
 - Graph 10: important attributes of being beautiful – men, 2024
- Men care about skin condition and skincare efficacy
 - Graph 11: BPC purchase/usage habits – men, 2024
- Weak consumption continues to affect men's grooming products, with men's spending on skincare having further declined since 2022
 - Graph 12: trading up and down – facial skincare, men, 2024
- 'For men' holds an advantage only in specific categories

COMPANIES AND BRANDS

Market share

- Men's facial skincare is under pressure, and market concentration increases
- L'Oréal SA strengthens its leading position
- The rapid rise of Mancodes
- Chando Himalaya achieves a slight increase in market share

Marketing activities

- Use sports or outdoor scenarios to prompt men's skincare needs
- Prove the necessity of anti-ageing with the characteristics of men's skin
- Cater to men's preferences and resonate with them to gain support
- Use new scenarios to interpret skincare benefits and enhance the product's relevance to core users
- Establish a moat with ingredients to create a professional and differentiated brand image
- Share men's skincare knowledge and enable consumers for long-term development

New product trends

- The proportion of new facial skincare products has increased in H1 2024
 - Graph 13: new men's facial skincare products, by new product type, 2020-24
- A continuous growth in the proportion of new face/neck care products since 2021
 - Graph 14: new men's facial skincare products, by sub-category, 2020-24

Men's Grooming Routines – China – 2024

- An increase in new lotion, emulsion and milk facial skincare products
- Functional claims such as mattifying and anti-ageing continue to grow among new launches
 - Graph 15: popular claims for new men's facial skincare products, 2020-24
- Mattifying: a combination of multiple ingredients, gentle and effective
- Anti-ageing: men's exclusive anti-ageing regimen
- South Korea and China lead in the proportion of new facial skincare products in the market
 - Graph 16: new men's grooming products, by category, 2023
- A higher proportion of new face/neck care products in facial skincare outside China's market
 - Graph 17: new men's grooming products, by category, 2023
- The proportion of anti-ageing and skintone management products in new products abroad is ahead of China
- Overseas age management products often combine other mainstream benefits

THE CONSUMER

Purchase decision maker

- Females account for 36% of decision-makers in the men's grooming market
 - Graph 18: purchase decision maker, 2024
- Men aged 30-39, those with high monthly personal income or living in Tier 1 cities care about grooming the most and are independent decision makers
 - Graph 19: purchase decision maker, by selected demographics, 2024

Appearance concerns

- Skin ageing, dark skin/dull complexion and oily skin are the primary factors of appearance anxiety in men
- Concerns about hair issues have been on the rise over the last three years
 - Graph 20: concerns about appearance – any selected, 2021 vs 2024

BPC product usage and preferred product type

- Facial skincare usage rates are moderate compared to other BPC products
 - Graph 21: usage of BPC products , 2024
- The development of men's grooming products varies across different categories
 - Graph 22: consumption upgrades/downgrades – personal care products, skincare, colour cosmetics, men, 2024
- 'For men' has a competitive edge in fragrances, facial cleansing and hair styling products
 - Graph 23: preferred product type, 2024
- Men's products are at different stages of development across different categories
- Haircare and bath and shower products enjoy a high penetration rate, and bodycare brands should pay attention to men aged 30-39
 - Graph 24: usage of BPC products – personal care, by age, 2024
- Men aged 18-29 are the core users of facial skincare products
 - Graph 25: usage of BPC products – skincare, by age, 2024

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- Men aged 18-39 prefer men's facial skincare products
 - Graph 26: preferred product type – skincare, by age, 2024
- More than half of men aged 18-29 use face base makeup products
 - Graph 27: usage of BPC products – colour cosmetics, by age, 2024
- Men aged 25-29 are more willing to use men's colour cosmetics products
 - Graph 28: preferred product type – colour cosmetics, by age, 2024
- Men aged 30-49 have a high demand for hair styling, and men aged 25-49 are the key audience for fragrances
 - Graph 29: usage of BPC products – hair styling products and fragrances, by age, 2024

Consideration factors for facial cleansers

- Choosing cleansers with a mild formula is just as important as strong cleansing power
 - Graph 30: consideration factors for facial cleansers, 2024
- Awaken the senses and enhance the experience to attract more male consumers
- Men aged 18-39 want a refreshingly cool sensation after facial cleansing
 - Graph 31: consideration factors for facial cleansers , by age, 2024
- Men who choose unisex cleansers particularly value cleansing capability
 - Graph 32: consideration factors for facial cleansers, by preferred facial cleansers product type, 2024

Preferred products for different skincare benefits

- Male consumers tend to choose facial serums or essences for skin repair, anti-acne and firming effects
 - Graph 33: preferred products for different skincare benefits , 2024

Makeup pain points

- Makeup fading or smudging is the most common issue in men's makeup
 - Graph 34: makeup pain points, 2024
- Choosing the right shade is a trickier issue for makeup product users
 - Graph 35: makeup pain points, by usage of BPC products, 2024

ISSUES AND INSIGHTS

The next opportunity in men's high-efficiency skincare: skin repair

- Repairing and soothing claims have climbed in the rankings on ecommerce platforms

Engage the senses and improve the experience will boost growth in men's facial cleansers

How to increase men's usage of colour cosmetics

- Boost the usage of colour cosmetics among males starting from existing products
- Enhance pre-sales service and lower the usage threshold

APPENDIX – MARKET SIZE AND FORECAST, RESEARCH METHODOLOGY AND ABBREVIATIONS

- Market size and forecast
- Methodology

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Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850