Passport

Men's Grooming in Hong Kong, China

Euromonitor International

May 2022

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MEN'S GROOMING IN HONG KONG, CHINA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Male consumers spend more time improving their overall health and wellbeing

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Key determinant purchasing factors are functionality and texture as non-gendered brands gain traction in skin care

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Men’s hair care gains traction as male consumers tackle hair care concerns such as hair loss

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PROSPECTS AND OPPORTUNITIES

Men’s grooming, especially men’s shaving, deodorants and hair care, to sustain growth momentum

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Premiumisation expected in men's shaving and hair care as men pursue tailored products and services for personal style

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Men's colour cosmetics expected to see limited potential amongst locals in Hong Kong

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CATEGORY DATA

Table 1 Sales of Men's Grooming by Category: Value 2016-2021

HKD million

	2016	2017	2018	2019	2020	2021
Men's Shaving						
- Men's Post-Shave						
- Men's Pre-Shave						
- Men's Razors and Blades						
Men's Toiletries						

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- Men's Bath and Shower	
-- Premium Men's Bath and Shower	
-- Mass Men's Bath and Shower	
- Men's Deodorants	
-- Premium Men's Deodorants	
-- Mass Men's Deodorants	
- Men's Hair Care	Data removed from sample
-- Premium Men's Hair Care	
-- Mass Men's Hair Care	
- Men's Skin Care	
-- Premium Men's Skin Care	
-- Mass Men's Skin Care	
Men's Fragrances	
- Premium Men's Fragrances	
- Mass Men's Fragrances	
Men's Grooming	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Men’s Grooming by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Men's Shaving			
- Men's Post-Shave			
- Men's Pre-Shave			
- Men's Razors and Blades			
Men's Toiletries			
- Men's Bath and Shower			
-- Premium Men's Bath and Shower			
-- Mass Men's Bath and Shower			
- Men's Deodorants			
-- Premium Men's Deodorants			
-- Mass Men's Deodorants			
- Men's Hair Care		Data removed from sample	
-- Premium Men's Hair Care			
-- Mass Men's Hair Care			
- Men's Skin Care			
-- Premium Men's Skin Care			
-- Mass Men's Skin Care			
Men's Fragrances			
- Premium Men's Fragrances			
- Mass Men's Fragrances			
Men's Grooming			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Men's Razors and Blades by Type: % Value Breakdown 2018-2021

% retail value rsp

	2018	2019	2020	2021
Disposables				
Systems				
Systems - Razors				
Systems - Refill Blades				
Total				

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Men's Skin Care by Type: % Value Breakdown 2018-2021

% retail value rsp

	2018	2019	2020	2021
Facial Care				
Body Care				
Total				

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 NBO Company Shares of Men’s Grooming: % Value 2017-2021

% retail value rsp

Company	2017	2018	2019	2020	2021

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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Men's Grooming: % Value 2018-2021

% retail value rsp

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 LBN Brand Shares of Men's Razors and Blades: % Value 2018-2021

% retail value rsp

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Forecast Sales of Men’s Grooming by Category: Value 2021-2026

HKD million

	2021	2022	2023	2024	2025	2026
Men's Shaving						
- Men's Post-Shave						
- Men's Pre-Shave						
- Men's Razors and Blades						
Men's Toiletries						
- Men's Bath and Shower						
-- Premium Men's Bath and Shower						
-- Mass Men's Bath and Shower						
- Men's Deodorants						
-- Premium Men's Deodorants						
-- Mass Men's Deodorants						
- Men's Hair Care						
-- Premium Men's Hair Care						
-- Mass Men's Hair Care						
- Men's Skin Care						
-- Premium Men's Skin Care						
-- Mass Men's Skin Care						
Men's Fragrances						
- Premium Men's Fragrances						
- Mass Men's Fragrances						
Men's Grooming						

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 9 Forecast Sales of Men's Grooming by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Men's Shaving			
- Men's Post-Shave			
- Men's Pre-Shave			
- Men's Razors and Blades			
Men's Toiletries			
- Men's Bath and Shower			
-- Premium Men's Bath and Shower			
-- Mass Men's Bath and Shower			
- Men's Deodorants			
-- Premium Men's Deodorants			
-- Mass Men's Deodorants			
- Men's Hair Care			
-- Premium Men's Hair Care			
-- Mass Men's Hair Care			
- Men's Skin Care			
-- Premium Men's Skin Care			
-- Mass Men's Skin Care			
Men's Fragrances			
- Premium Men's Fragrances			
- Mass Men's Fragrances			
Men's Grooming			

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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

BEAUTY AND PERSONAL CARE IN HONG KONG, CHINA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Beauty and personal care in 2021: The big picture

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2021 key trends

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Competitive landscape

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Retailing developments

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What next for beauty and personal care?

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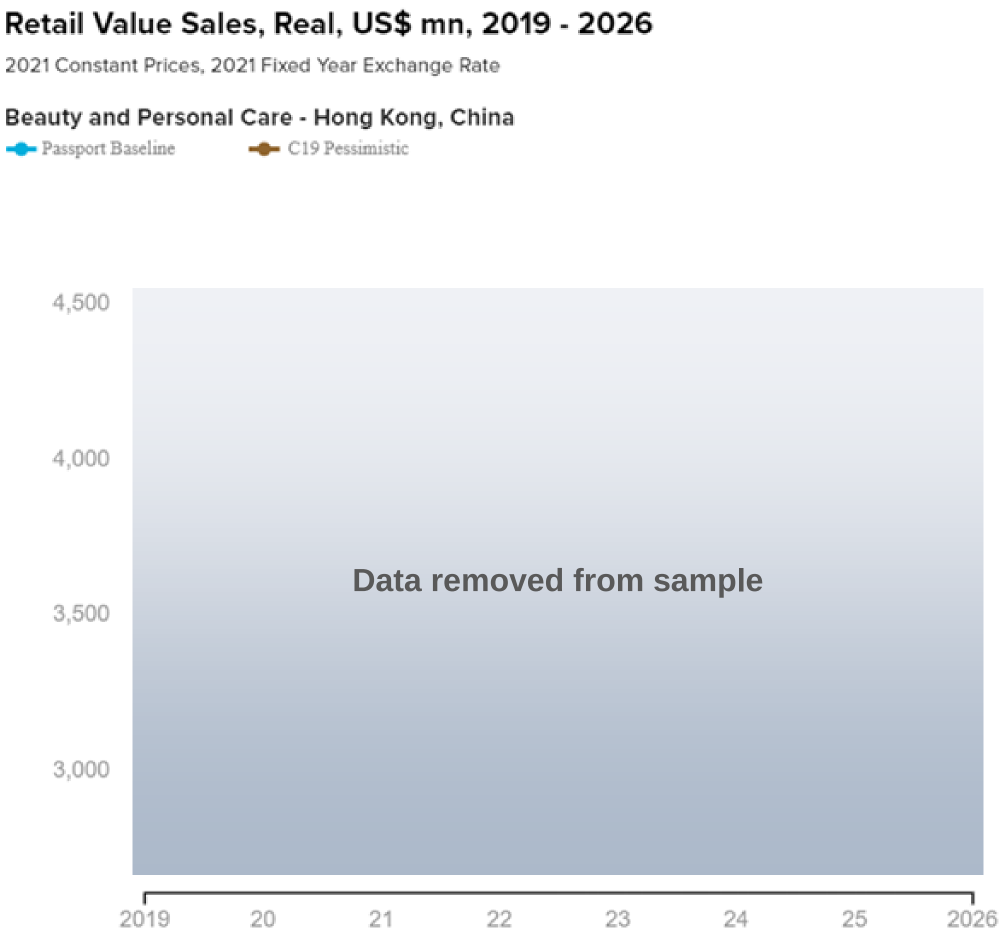
Chart 1 Beauty and Personal Care Value Sales Growth Scenarios: 2019-2026



Source: Euromonitor International

Note: C19 Pessimistic 1 represents a modelled scenario with an estimated probability of 25-35% over a 1-year horizon, factoring in macro drivers including GDP, stock prices, business and consumer confidence rates alongside infection rates, supply chain and labour supply disruption rates

Chart 2 Beauty and Personal Care Impact of Soft Drivers on Value Sales: 2019-2026

Retail Value Sales, Real US$ mn 2019 - 2026

2021 Constant Prices, 2021 Fixed Year Exchange Rate

Hong Kong, China - Beauty and Personal Care

Retail Value Sales, Real Growth

Passport Baseline

Driver effects

GDP Per Capita

Product Price

Habit Persistence

Population

Substitutes Price

(2-in-1 Products; Bar Soap; Basic Moisturisers; Battery Toothbrushes; Blusher/Bronzer/Highlighter; Body Wash/Shower Gel; Deodorant Pumps; Deodorant Sticks; Electric Toothbrush Units; Electric Toothbrushes; Eye Make-Up; Firming/Anti-Cellulite Body Care; Foundation/Concealer; General Purpose Body Care; Lip Gloss; Lipstick; Liquid Soap; Liquid/Cream/Gel/Bar Cleansers; Mascara; Mass BB/CC Creams; Mass Fragrance Sets/Kits; Mass Liquid/Cream/Gel/Bar Cleansers; Mass Men's Fragrances; Mass Nail Treatments/Strengthener; Mass Other Facial Make-Up; Mass Sun Protection; Mass Unisex Fragrances; Mass Women's Fragrances; Mouth Fresheners; Mouthwashes/Dental Rinses; Other Facial Make-Up; Other Lash and Brow Make-Up; Other Lip Products; Other Nail Products; Premium Basic Moisturisers; Premium Eye Shadow; Premium Face Masks; Premium Fragrance Sets/Kits; Premium Hand Care; Premium Lip Gloss; Premium Liquid/Cream/Gel/Bar Cleansers; Premium Mascara; Premium Men's Fragrances; Premium Other Facial Make-Up; Premium Other Lash and Brow Make-Up; Premium Unisex Fragrances; Premium Women's Fragrances; Salon Professional Hair Care; Shampoos; Standard Shampoos; Toothbrushes)

Demographics

(Share of Female population Aged 15-64; Share of Female population Aged 40-59)

Socio-Economic Trends

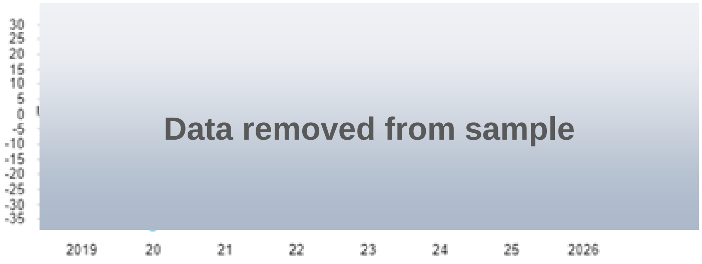
(Female Employment Rate; Share of Economically Active Women Ages 15-34)

Market Environment

(Beauty and Personal Care Direct Selling per Capita; Grocery Selling Space per Capita)

Soft Drivers

(- Competition; - Maturity of sector; + Consumer awareness; + Lifestyle trends; + Product variety; + Promotion)



Source: Euromonitor International

Note: The above chart shows the growth decomposition split by macro drivers such as GDP per capita and population alongside soft drivers listed as having a positive (+) or negative (-) impact on the total growth rate

MARKET DATA

Table 10 Sales of Beauty and Personal Care by Category: Value 2016-2021

HKD million

	2016	2017	2018	2019	2020	2021
Baby and Child-specific Products						
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Oral Care Excl Power Toothbrushes						
Skin Care						
Sun Care						
Premium Beauty and Personal Care						
Prestige Beauty and Personal Care						
Mass Beauty and Personal Care						
Dermocosmetics Beauty and Personal Care						
Beauty and Personal Care						

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, and baby and child-specific sun care categories

Table 11 Sales of Beauty and Personal Care by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Baby and Child-specific Products			
Bath and Shower			
Colour Cosmetics			
Deodorants			
Depilatories			
Fragrances			
Hair Care			
Men's Grooming			
Oral Care			
Oral Care Excl Power Toothbrushes			
Skin Care			
Sun Care			
Premium Beauty and Personal Care			

Data removed from sample

Prestige Beauty and Personal Care	Data removed from sample
Mass Beauty and Personal Care	
Dermocosmetics Beauty and Personal Care	
Beauty and Personal Care	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, and baby and child-specific sun care categories

Table 12 GBO Company Shares of Beauty and Personal Care: % Value 2017-2021

% retail value rsp

Company	2017	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 NBO Company Shares of Beauty and Personal Care: % Value 2017-2021

% retail value rsp

Company	2017	2018	2019	2020	2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 LBN Brand Shares of Beauty and Personal Care: % Value 2018-2021

% retail value rsp

Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Penetration of Private Label in Beauty and Personal Care by Category: % Value 2016-2021

% retail value rsp

	2016	2017	2018	2019	2020	2021
Baby and Child-specific Products						
Bath and Shower						
Beauty and Personal Care						
Deodorants						
Depilatories						
Hair Care						
Mass Beauty and Personal Care						
Men's Grooming						
Oral Care						

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Distribution of Beauty and Personal Care by Format: % Value 2016-2021

% retail value rsp

	2016	2017	2018	2019	2020	2021
Store-Based Retailing						
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Non-Grocery Specialists						
-- Apparel and Footwear Specialists						
-- Appliances and Electronics Specialists						
-- Health and Beauty Specialist						
--- Beauty Specialists						
--- Chemists/Pharmacies						
--- Drugstores/ parapharmacies						
--- Other BPC Health and Beauty Specialist Retailers						
-- Home and Garden Specialist Retailers						
--- Homewares and Home Furnishing Stores						

Data removed from sample

-- Other Non-Grocery Retailers	Data removed from sample
--- Outdoor Markets	
--- Other BPC Non-Grocery Specialists	
- Mixed Retailers	
-- Department Stores	
-- Mass Merchandisers	
-- Variety Stores	
-- Warehouse Clubs	
Non-Store Retailing	
- Direct Selling	
- Homeshopping	
- E-Commerce	
- Vending	
Non-retail channels	
- Hair Salons	
Total	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Distribution of Beauty and Personal Care by Format and Category: % Value 2021

% retail value rsp

	Baby and Child-specific Products	Bath and Shower	Colour Cosmetics	Deodorants	Depilatories	Fragrances
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Non-Grocery Specialists						
-- Apparel and Footwear Specialists						
-- Appliances and Electronics Specialists						
-- Health and Beauty Specialist						
--- Beauty Specialists						
--- Chemists/Pharmacies						
--- Drugstores/parapharmacies						
--- Other BPC Health and Beauty Specialist Retailers						
-- Home and Garden Specialist Retailers						
--- Homewares and Home						

Furnishing Stores	Data removed from sample
-- Other Non-Grocery Retailers	
--- Outdoor Markets	
--- Other BPC Non-Grocery Specialists	
- Mixed Retailers	
-- Department Stores	
-- Mass Merchandisers	
-- Variety Stores	
-- Warehouse Clubs	
Non-Store Retailing	
- Direct Selling	
- Homeshopping	
- E-Commerce	
- Vending	
Non-retail channels	
- Hair Salons	
Total	

	Hair Care	Men's Grooming	Oral Care	Skin Care	Sun Care
Store-Based Retailing	Data removed from sample				
- Grocery Retailers					
-- Modern Grocery Retailers					
--- Convenience Stores					
--- Discounters					
--- Forecourt Retailers					
--- Hypermarkets					
--- Supermarkets					
-- Traditional Grocery Retailers					
- Non-Grocery Specialists					
-- Apparel and Footwear Specialists					
-- Appliances and Electronics Specialists					
-- Health and Beauty Specialist					
--- Beauty Specialists					
--- Chemists/Pharmacies					
--- Drugstores/ parapharmacies					
--- Other BPC Health and Beauty Specialist Retailers					
-- Home and Garden Specialist Retailers					
--- Homewares and Home Furnishing Stores					
-- Other Non-Grocery Retailers					
--- Outdoor Markets					
--- Other BPC Non-Grocery Specialists					
- Mixed Retailers					
-- Department Stores					
-- Mass Merchandisers					
-- Variety Stores					

-- Warehouse Clubs	Data removed from sample
Non-Store Retailing	
- Direct Selling	
- Homeshopping	
- E-Commerce	
- Vending	
Non-retail channels	
- Hair Salons	
Total	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: BC = baby and child-specific products; BS = bath and shower; CC = colour cosmetics; DO = deodorants; DP = depilatories; FR = fragrances; HC = hair care; MG = men’s grooming; OC = oral care; SK = skin care; SU = sun care

Table 18 Forecast Sales of Beauty and Personal Care by Category: Value 2021-2026

HKD million

	2021	2022	2023	2024	2025	2026
Baby and Child-specific Products	Data removed from sample					
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Oral Care Excl Power Toothbrushes						
Skin Care						
Sun Care						
Premium Beauty and Personal Care						
Prestige Beauty and Personal Care						
Mass Beauty and Personal Care						
Dermocosmetics Beauty and Personal Care						
Beauty and Personal Care						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Note 2: Sum of categories is greater than market size because of double counting in men’s bath and shower, men’s deodorants, men’s hair care, men’s skin care, men’s fragrances and baby and child-specific sun care categories

Table 19 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Baby and Child-specific Products	Data removed from sample		

Bath and Shower
Colour Cosmetics
Deodorants
Depilatories
Fragrances
Hair Care
Men's Grooming
Oral Care
Oral Care Excl Power Toothbrushes
Skin Care
Sun Care
Premium Beauty and Personal Care
Prestige Beauty and Personal Care
Mass Beauty and Personal Care
Dermocosmetics Beauty and Personal Care
Beauty and Personal Care

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care
Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances and baby and child-specific sun care categories

DISCLAIMER

Forecast and scenario closing date: 11 April 2022

Report closing date: 3 April 2022

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2021 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

Official Sources	**Content removed from sample**
Trade Associations	

Trade Press	Content removed from sample

Source: Euromonitor International