

China Nail Care Market Assessment, By Category [Nail Polish (Liquid Polish, Gel Polish, Top and Base Coat, Others), Nail Polish Removers, Nail Extensions, Nail Accessories, Others], By End-use [Professional, Individual], By Distribution Channel [Online, Offline], By Region, Opportunities, and Forecast, 2016-2030F

<https://marketpublishers.com/r/CC93788A58B8EN.html>

Date: February 2025

Pages: 133

Price: US\$ 3,300.00 (Single User License)

ID: CC93788A58B8EN

Abstracts

The China nail care market is experiencing robust growth and is projected to reach USD 4 billion by 2030 from USD 2.05 billion in 2022. China nail care market is displaying a strong growth trajectory and it is forecasted to grow at 8.73% compounded annually for the forecast period between 2023 and 2030 due to the large consumer base and rising beauty awareness coupled with shifting fashion trends among Chinese customers to improve the appearance and health of their nails. Chinese consumers incorporate nail care in their regular self-care routines and personal grooming and there are various nail care items available in the market, ranging from nail polishes and nail art supplies to nail treatments.

China offers tremendous prospects for both domestic and foreign brands in the nail care market due to its sizeable population and growing middle class. The main factors influencing the growth of the nail care market in China are increased disposable income, changing beauty preferences, expanding nail health awareness and the impact of e-commerce and social media. China is a major manufacturing and export hub for various brands globally which gives the Chinese nail care market an edge over other countries' markets in terms of more options and product availability mainly for extensions and accessories.

Influence of Social Media

The influence of social media platforms, such as WeChat, Weibo, and Douyin, has played a significant role in popularizing nail care services in China. Influencers and beauty bloggers often showcase their nail art designs, trends, techniques and salon experiences, creating a desire among customers to try out similar services. Social media platforms often showcase nail art trends and challenges that capture the attention and participation of users. These trends can range from specific nail art designs, colour combinations, or techniques. Nail salons and technicians quickly adapt to these trends to cater to the demands of their customers, ensuring they stay up to date with the latest trends. Social media platforms are filled with DIY (Do-It-Yourself) nail art tutorials that provide step-by-step instructions on creating various nail designs at home. This has empowered Chinese customers to experiment with nail art techniques and try their hand at creating professional-looking designs. DIY tutorials have not only fostered creativity but have also driven the demand for nail care products and tools.

Government Regulations

China Food and Drug Administration (CFDA) is the regulatory authority that provides registration and approval for nail care products, including nail polishes, nail gels, and nail extensions. Manufacturers and distributors are required to provide accurate and comprehensive labelling, including product ingredients, usage instructions, and safety warnings. The People's Republic of China's General Administration of Quality Supervision, Inspection, and Quarantine (AQSIQ) is in charge of managing the issuance of hygiene licences. The State Administration of Industry and Commerce (SAIC) regulates cosmetics product advertising, falsification, and consumer rights protection. The State Administration for Market Regulation (SAMR) is the administrative hub for all agencies in charge of cosmetics regulation.

The Cosmetics Hygiene Supervision Regulations, released in 1989, were replaced by the 2021 Cosmetics Supervision and Administration Regulations (CSAR), which have the approval of the Ministry of Health. To build China's Cosmetic Regulatory Framework, the CSAR in China will publish administrative regulations. Cosmetics are now classified as either Special Cosmetics or General Cosmetics in China, under the new regulations.

E-Commerce Channel Driving the Sales

The importance of online sales for nail care products is growing and China currently has one of the most dynamic nail care markets in the world. E-commerce platforms have

enabled nail care brands, both domestic and international, to reach a wider consumer base across China. With the convenience of online shopping, customers can access a diverse range of nail care products from various brands, including nail polishes, nail care kits and accessories. E-commerce platforms in China often utilize advanced algorithms and data analytics to provide personalized recommendations and tailored shopping experiences. This helps consumers discover new nail care products based on their preferences and past purchases, enhancing their overall shopping experience. Taobao, AliExpress, Jumei and Tmall are some popular E-commerce platforms for nail care products in China.

Growing Demand for Specialized Nail Care Services

Nail care services in China are not limited to basic manicures and pedicures. There is a growing demand for specialized services such as gel nails, nail extensions, and nail treatments like nail strengthening and cuticle care. This expansion of services provides more options for customers to choose from and enhances their overall nail care experience. The growing middle-class population and increasing disposable income in the past years have led to a rise in customer spending on personal care and beauty services, including nail care. Urbanization in China has resulted in a shift towards modern lifestyles and beauty-consciousness among urban dwellers. With hectic work schedules and busy lifestyles, individuals seek convenient and professional services to enhance their appearance and well-being.

The business database Qichacha stated that despite a consistent zero-COVID policy, the number of newly registered nail art enterprises increased from 161,000 in 2020 to 250,000 in 2021.

Impact of COVID-19

China nail care market was significantly impacted by the COVID-19 outbreak, as it had on various other industries worldwide. To combat the virus's spread, the authorities implemented strict shutdown and movement restrictions. As a result of such policies, numerous manufacturing and production units were forced to close temporarily and work in a limited capacity and thus, the output decreased and affected nail care market expansion not just in China but all over the globe. Retail networks and distribution channels were also affected, by government policies, which caused a shortage and unavailability of nail care products in the market. However, the sales for nail care products surged on online e-commerce platforms and DIY culture also became prevalent, these changes in consumer behaviour still follow the aftermath of COVID-19.

Key Players Landscape and Outlook

China nail care market is booming and serves as a significant center for the manufacturing and consumption of nail care products. The nail care market in China is highly competitive and consists of a variety of key players, including both domestic and international brands. These companies offer a wide range of nail care products, including nail polishes, nail treatments, and nail accessories, and more customers are eager to spend more money on luxury high-end beauty brands. Nail care companies began incorporating technology into their products and moving towards sustainable packaging options due to changing consumer behavior. Apart from popular nail care companies namely OPI, Essie and L'Oreal, domestic manufacturers are tapping huge market potential and capacity to manufacture nail care products like nail polishes, removers and accessories in China for domestic consumption and export purposes.

In May 2023, Missgel announced the launch of its new 2 in 1 glitter base coat gels which come with chunky glitters giving a multi-dimensional effect to the nails.

In June 2023, Roniki announced its upcoming product- Foil Flake Rubber Base which is an upgraded microcrystal technology which allows the glue base to resist the regular scratches on nails in daily life.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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