SPOTLIGHT ON FACIAL MASKS

The multitude of facial masks in the market today is massive and shows no signs of slowing down. Join Mintel as we deep dive into the facial mask landscape to identify the trends and opportunities in Asia.
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Our expert analysis of the highest quality data and market research will help you grow your business.
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50+ years Industry experience

CREDIBLE DATA

Innovation

Consumers

Markets

Trends

LEADING INDUSTRY FORECASTING

WHAT’S NEXT
AGENDA

Overview of facial masks market
Consumers’ usage & perception of facial masks
Evolution of facial masks
Facial masks opportunities in Asia
Overview of Facial Masks Market

• The important players and key product claims
China & Japan are the largest facial care markets

Malaysia holds growth potential with 41% growth projection two years from now. This is followed by China at 29% and India at 23%.

53% of Chinese Millennial females agree that facial masks are the best first-aid skincare products.

<table>
<thead>
<tr>
<th>Country</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>% change between 2017 - 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>787</td>
<td>722</td>
<td>743</td>
<td>-7%</td>
</tr>
<tr>
<td>China</td>
<td>15,805</td>
<td>16,793</td>
<td>18,074</td>
<td>29%</td>
</tr>
<tr>
<td>India</td>
<td>1390</td>
<td>1,447</td>
<td>1,520</td>
<td>23%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>548</td>
<td>573</td>
<td>605</td>
<td>19%</td>
</tr>
<tr>
<td>Japan</td>
<td>13,536</td>
<td>13,844</td>
<td>14,994</td>
<td>16%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>452</td>
<td>490</td>
<td>563</td>
<td>41%</td>
</tr>
<tr>
<td>Philippines</td>
<td>725</td>
<td>739</td>
<td>769</td>
<td>14%</td>
</tr>
<tr>
<td>South Korea</td>
<td>6,648</td>
<td>6,730</td>
<td>7,075</td>
<td>16%</td>
</tr>
<tr>
<td>Thailand</td>
<td>533</td>
<td>554</td>
<td>571</td>
<td>15%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>485</td>
<td>486</td>
<td>493</td>
<td>5%</td>
</tr>
</tbody>
</table>

Base: 2,935 female internet users aged 20-49, who have used facial masks in the last six months
Source: Mintel Market Sizes; QQ survey/Mintel
Facial sheet mask boom in Asian beauty markets

**Sheet mask** % of facial skincare launches, Jan 2016 – May 2017

<table>
<thead>
<tr>
<th>Region</th>
<th>% of Global Sheet Mask Launches</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia</td>
<td>7.2</td>
</tr>
<tr>
<td>Europe</td>
<td>2</td>
</tr>
<tr>
<td>North America</td>
<td>2.6</td>
</tr>
<tr>
<td>Latin America</td>
<td>1.8</td>
</tr>
<tr>
<td>Middle East &amp; Africa</td>
<td>0.4</td>
</tr>
<tr>
<td>Global total</td>
<td>4.5</td>
</tr>
</tbody>
</table>

**Leading country of manufacture** % of global facial sheet mask launches, Jan 2016 – May 2017

- South Korea: 41%
- China: 22%
- Taiwan: 9%
- Japan: 8%
- France / US (each): 2%

Source: Mintel GNPD
Hydrating sheet & leave-on are most popular; cleansing works via clay or scrub formats

- Replenishment of moisture is important to skincare consumers.
- Growing interest in natural ingredients drives the botanical claims.
- Clay or scrub formats are preferred for cleansing or purifying functions.

### Formats/textures of global new masks launches 2016

<table>
<thead>
<tr>
<th>Product Type</th>
<th>Market Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sheet Mask</td>
<td>19.6</td>
</tr>
<tr>
<td>Gel &amp; Jelly</td>
<td>3.3</td>
</tr>
<tr>
<td>Cream</td>
<td>3.1</td>
</tr>
<tr>
<td>Clay &amp; Mud</td>
<td>2.5</td>
</tr>
<tr>
<td>Scrub</td>
<td>1.3</td>
</tr>
<tr>
<td>Serum</td>
<td>0.6</td>
</tr>
<tr>
<td>Essence</td>
<td>0.6</td>
</tr>
<tr>
<td>Balm</td>
<td>0.4</td>
</tr>
<tr>
<td>Powder (incl. Compact, Pressed &amp; Baked)</td>
<td>0.4</td>
</tr>
<tr>
<td>Oil</td>
<td>0.4</td>
</tr>
</tbody>
</table>

Anti-ageing sheet masks gain popularity in the West

- The sheet mask trend is dominated by APAC, accounting for 76% of the sheet masks launches in 2016. This is followed by Europe (16%) and U.S (8%).
- Most launches in APAC came from the North Asia region (83%), followed by Singapore (4%), Vietnam (4%), Thailand (3%) and then India and Indonesia (at 2% each).

<table>
<thead>
<tr>
<th>Claim</th>
<th>Asia Pacific</th>
<th>Europe</th>
<th>North America</th>
<th>Latin America</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moisturising/Hydrating</td>
<td>76%</td>
<td>63%</td>
<td>68%</td>
<td>57%</td>
</tr>
<tr>
<td>Botanical/Herbal</td>
<td>70%</td>
<td>74%</td>
<td>74%</td>
<td>36%</td>
</tr>
<tr>
<td>Anti-Ageing</td>
<td>36%</td>
<td>50%</td>
<td>61%</td>
<td>21%</td>
</tr>
<tr>
<td>Brightening/Illuminating</td>
<td>36%</td>
<td>34%</td>
<td>51%</td>
<td>21%</td>
</tr>
<tr>
<td>Time/Speed</td>
<td>21%</td>
<td>52%</td>
<td>58%</td>
<td>36%</td>
</tr>
<tr>
<td>Firming*</td>
<td>17%</td>
<td>30%</td>
<td>26%</td>
<td>0%</td>
</tr>
<tr>
<td>Vitamin/Mineral-Fortified</td>
<td>19%</td>
<td>20%</td>
<td>21%</td>
<td>7%</td>
</tr>
<tr>
<td>Whitening</td>
<td>20%</td>
<td>17%</td>
<td>9%</td>
<td>14%</td>
</tr>
<tr>
<td>Reduces Fine Lines/Wrinkles*</td>
<td>15%</td>
<td>30%</td>
<td>26%</td>
<td>7%</td>
</tr>
<tr>
<td>Long-Lasting*</td>
<td>15%</td>
<td>19%</td>
<td>28%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Source: Mintel GNPD
Understanding consumers

- Usage and perception towards facial masks
of Brazilians agree that looking after the skin at night is as important as looking after it during the day.

of Chinese consumers use sleeping masks in the evening; while 69% use sheet masks at the same time of the day.

of US consumers think it is important to see rapid results from skincare products.

of UK consumers aged 16-24 are using more skincare treatment (such as masks) in the last 12 months.

Source: Lightspeed/Mintel, KuRunData/Mintel
Facial skincare usages

Of Chinese consumers aged 30-39 feel happy after using a facial mask.

Younger Chinese consumers in their 20s are key target audience for facial masks.

Of Chinese consumers aged 25-29 use multi-step masks compared to 52% of Chinese consumers aged 40-49.

The top 3 skin concerns that US consumers wish to address with the usage of masks:

- Acne/blemishes: 29%
- Signs of ageing: 27%
- Fine lines and wrinkles: 27%

Source: Lightspeed/Mintel, KuRunData/Mintel
Whitening & brightening matters more to 25-29 years old

In Asia, fair skin has always been associated with beauty.

Among the younger generation, healthy, radiant skin that glows has become the new definition of beauty. This drives brightening and whitening claims, especially in Asia.

China: Functions of masks used

- Hydration: 84% (20-24), 78% (25-29), 77% (30-39), 71% (40-49)
- Whitening: 78% (20-24), 63% (25-29), 59% (30-39), 55% (40-49)
- Pore refining: 59% (20-24), 53% (25-29), 46% (30-39), 42% (40-49)
- Cleaning: 53% (20-24), 52% (25-29), 44% (30-39), 36% (40-49)
- Brightening: 49% (20-24), 43% (25-29), 44% (30-39), 38% (40-49)
- Oil Balancing: 37% (20-24), 35% (25-29), 27% (30-39), 23% (40-49)
- Soothing: 39% (20-24), 31% (25-29), 27% (30-39), 23% (40-49)
- Exfoliating: 30% (20-24), 28% (25-29), 22% (30-39), 23% (40-49)

*Base: 2,935 female internet users aged 20-49, who have used facial masks in the last six months
Source: KuRunData/mintel
Evolution of facial masks

- Facial mask landscape
- Spotlight launches 2016-2017
Key facial mask types

Sheet mask
Sheet mask (or sheet mask pack) usually means a cloth or paper saturated in a high dosage of skincare ingredients for one-time use. Common sheet masks include non-wove masks, cotton masks, hydrogel masks and bio-cellulose masks.

Sleeping mask
Sleeping mask (or sleeping pack) usually means a gel or cream-based product that can be applied before sleep and left on the skin overnight. It can also be seen as an alternative to using a night cream.

Rinse-off mask
Rinse-off mask (or mask pack/ modelling pack) usually means a mud, peel-off, cream or gel-based formulation that’s applied to the face and is washed off after 10-30 minutes.

The latest innovations in sheet masks are designed to be washed off the skin.
Globally: facial mask launches by region

Global facial mask launch activity by region – YOY Jan 2012 – YTD 2017

<table>
<thead>
<tr>
<th>Year</th>
<th>Asia Pacific</th>
<th>Europe</th>
<th>North America</th>
<th>Latin America</th>
<th>Middle East &amp; Africa</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>53%</td>
<td>33%</td>
<td>8%</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>2013</td>
<td>55%</td>
<td>34%</td>
<td>7%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>2014</td>
<td>49%</td>
<td>39%</td>
<td>9%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>2015</td>
<td>58%</td>
<td>29%</td>
<td>8%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>2016</td>
<td>53%</td>
<td>31%</td>
<td>10%</td>
<td>5%</td>
<td>1%</td>
</tr>
<tr>
<td>YTD 2017</td>
<td>53%</td>
<td>33%</td>
<td>9%</td>
<td>4%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: Mintel GNPD
Sheet masks are fast expanding in the west – ideal for ‘Instagrammable beauty’

Drew Barrymore
#goldenglobes #kbeauty

Emma Stone
#goldenglobes #koreanskincare#silliness
Retailers rush to expand sheet mask choices

Sephora launched PB sheet masks – Sephora Collection with 8 variants in 2014 ($6) and has extended line-ups every year

Boots launched PB sheet masks – Boots Ingredients sheet face masks with 5 variants in 2016 (£2.50)

Source: Boots, Beauty Editor CA
Sheet mask is only a click away

Sheet Mask Café by Korean beauty brand - MISSHA

In Korea, the café scene is as prevalent as the beauty scene and the partnership between beauty & food is gaining popularity and offering product inspiration.

MISSHA combines both to offer an interesting shopping experience and offers beverage-inspired masks at very affordable prices.

FaceTory – sheet masks subscription boxes

Located in U.S to curate and run a monthly sheet mask subscription box

Providing easy access to Korean sheet masks for consumers outside of Korea

Source: MISSHA site, FaceTory site
Facial masks landscape
59% of female Chinese consumers aged 30-39 feel happy after using a facial mask.
40% of Thai women have used a face mask in the last 12 months.

**Hydrogel sheet**
(USA)

**Dry sheet**
(Canada)

**Knit sheet**
(South Korea)

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**H2O+ Beauty Waterbright Water-Infused Brightening Gel Mask**
Is a two-piece single-use brightening gel facial mask that is easy to use, mess-free, with no dripping or slipping.

**Charlotte Tilbury Instant Magic Facial Dry Sheet Mask**
Is a dry textile fabric impregnated with tiny vectors of ‘magic’ actives that are last for eight hours and are delivered directly into the third layer of the epidermis.

**Neogen Dermalogy Neogen Naturals White Truffle Hydramax Knit Mask**
Is made with a thick knit material and saturated in white truffle moisture essence for radiance.
Formats: fabric innovations to enhance functions

In the US, 8% of consumers use facial masks as part of their evening routine, while 29% of use facial masks on an ‘as-needed’ basis.

Gold foil sheet (South Korea)

No:hj Golden Modelling Foil Mask
Is a foil sheet that warms the skin so its essence absorbs deeply. It’s formulated with gold and hyaluronic acid to lift and hydrate.

Bio-cellulose sheet (India)

LuxaDerme Skin Brightening Bio Cellulose Mask
is 100% natural and made with fermented coconut jelly. It fits like a second skin, with a Nanofit 3D structure, and is designed to retain extra moisture and impart its elements to ‘perfectly’ transform the complexion, giving a youthful glow.

Clay sheet (South Korea)

ULTRU Clay Face Sheet Mask
is made with two-ply sheets that sit on top of a microfibre layer, so the product penetrates the skin without leaving a mess behind.
South Korea: premium sheet mask launches

1-hour sauna effect in 10 minutes

**Make Prem Wrapping Me Sauna Mask**
Double-sided sheet mask (natural cellulose sheet inside, foil sheet outside) locks in moisture while using body heat to deliver a one-hour sauna effect. Comes in whitening, firming and moisturising versions.

**Maxclinic’s Miracle Ampoule Dressing/Contouring Object**
Two-layer sheet mask comprising an 'ampoule sheet' and a 'plaster contouring sheet'. The plaster sheet hardens to offer a strong lifting and sculpting effect for 30-40 minutes.

**Modelling mask benefit**

**Dr. Jart+ Lover Rubber Mask**
Convenient version of a modelling mask in a sheet mask format, which comprises an ampoule capsule and a rubber sheet. Comes in four colours and functions.
South Korea: premium sheet mask launches

**Vitamin C injection**

Wellage Vitagold Injection Mask
Offers a fresh boost of vitamin C in a sheet mask. The injection-style ampoule contains serum and vitamin C powder and is mixed by pumping the plunger, and then is infused into the sheet pouch via an opening.

**3D span-tex**

Neozen 3D Lifting Compression Span-Tex Mask
Five patented formulas can be infused into high-elasticity, three-layer sheets (one high-tension spandex sheet between two 100% cotton sheets) to lift the forehead, eyes, cheeks and chin.

**3-step mask**

MediHeal S:The 3 Step Mask – NMF
A holistic treatment in three steps: exfoliating with a cotton pad, moisturising with the sheet mask, and brightening using a pink tone-up cream. The 'S' in the product name is a twist on 'aesthetic treatment'.
Textures: create sensorial experiences and selfie opportunities

**Bubbling mask**
(South Korea)

Elizavecca Milky Piggy Carbonated Bubble Clay Mask
Formulated with carbonated water, charcoal powder and mud, cleanses while tightening the pores at the same time.

**Splash mask**
(U.S.A)

Boscia Tsubaki Splash Mask
a highly-concentrated instant deep-hydration, customisable treatment that’s infused with cold-pressed tsubaki oil, rich in vitamin C and rice bran oil.

**Magnetic mask**
(UK)

Lancer Younger Revealing Mask Intense
contains silicone-encapsulated mineral powder that’s rich in iron, combined with a magnetic tool to provide a ‘unique’ experience to reveal younger-looking, glowing skin.

Source: Mintel GNPD
Ingredients: nature inspired

Alaskan glacier water (South Korea)

Skin79 Water Tank Water Splash Mask
comprises: separated mask essence and sheet, to minimise preservatives. The moisturising and hydrating pure cotton mask is enriched with minerals from an Alaskan glacier from 10,000ppm, to stimulate the skin’s metabolism and leave skin moisturised glowing.

Bamboo (China)

Face Love Bamboo Tiger Face Bio-Cellulose Fleece Mask
Is enriched with natural bamboo extract and features a superfine microfibre. It’s claimed to work like a compress, providing the skin with intense nutrients for nourished, vitalised and uplifted skin.

French Mediterranean sea mud (Thailand)

YC Whitening Facial Herbal Mud Mask
Is made from French Mediterranean Sea mud that is said to have immediate therapeutic cooling, soothing and nourishing effects. It brightens and balances skin, and is deep cleansing, detoxifying, refreshing, relaxing and promotes blood circulation to lighten and lift a tired complexion.

Source: Mintel GNPD
Ingredients: food inspired

Wheat & celery (South Korea)

Ariul Wheat & Celery Juice Cleanse Mask
A real vitamin C dot sheet with whitening and toning effects. It contains 10,000ppm wheat for hydrating, 10,000ppm celery for soothing, 40mg kohlrabi for nourishing, 100mg pear, and 60mg avocado for skin protection.

Watermelon (U.S)

Glow Recipe Watermelon Glow Sleeping Mask
is packed with an assortment of sought-after superfoods, including watermelon extract, which is rich in antioxidants, vitamins and amino acids. It contains other notable extracts such as pumpkin, pomegranate, seaweed, banana, sweet potato and cabbage.

Black rice (China)

MG Black Ferment Force Deep Purifying Mask
is formulated with charcoal and botanical extracts like black rice. It's suitable for dull-looking skin, to purify, refine pores, and remove dirt while improving dry and coarse skin and skin tone.
Proposition: target-specific designs/fabrics

52% of US men aged 18-34 use facial masks as part of their skincare routine.

For men

DTRT Hero Likes Black Mask Sheets
Larger size for men who want to shrink their pores.

For babies

Goong Secret’s Baby Soothing Mask Sheet
Advised to apply for 15-20 minutes. For babies aged 8+ months.

For family

Wellage Family Mask
100% cotton, 8-free from mask sheet for use by all the family. In two sizes: regular and small.

For pregnant women

Knowyoung Rye Whitening Mask
To add a glow to the skin of pregnant women. Contains rye from the highlands.

Source: Mintel GNPD
**Proposition: target-specific masks for mass segments**

<table>
<thead>
<tr>
<th>For hands</th>
<th>For feet</th>
<th>For breasts</th>
<th>For fingernails</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Montagne Jeunesse 7th Heaven Spa Soften Glove Masques</strong></td>
<td><strong>Skin Republic Foot Peel Foot Mask</strong></td>
<td><strong>Felinz Breast Mask</strong></td>
<td><strong>ROYALSKIN Aroma Therapy Rosehips Nail Finger Mask</strong></td>
</tr>
<tr>
<td>contains ultra-moisturising rose flower and shea butter, to help treat dry, rough and chapped skin.</td>
<td>is developed with alpha hydroxy acids to remove calluses and rough skin.</td>
<td>is to soften and smooth breasts; contains phytoestrogen, to help promote breast development for a full and round breast.</td>
<td>gives intensive nourishment with Rosa Canina fruit oil for healthy and hydrated fingernails and tips.</td>
</tr>
</tbody>
</table>
40% of Chinese consumers used suncare products in 2016, an increase from 34% the year before.*

48% of UK self-tan users are drawn to easy-to-use self-tanning products, which encourage and increase usage.**

Usage of suncare products has increased over the years, as consumers become more aware of the damage caused by UV exposure. Product extensions within the suncare category holds potential for growth to cater to different sun exposure needs.

Functions: different claims positioning – to widen appeal

**St. Tropez Self Tan Express Bronzing Face Sheet Mask** is soaked with St. Tropez's tanning serum and hyaluronic acid; revitalises the complexion with an ultra-hydrating, dewy glow that evens skin tone and develops into a long-lasting, golden tan.

**Garden Love Aloe Vera After Sun Face Sheet Mask** is enriched with aloe vera for moisture and cools and supports the skin after sunbathing.

Base: *3,000 internet users aged 20-49 in both 2015 and 2016; **652 internet users aged 16+ who have used self-tanning products in the last 12 months or who are interested in using them

Source: Mintel GNPD, BPC, Mintel Reports
Design: create photos opportunities on social media

**Hydrogel Lace Mask** (Hong Kong)

Watsons Bird's Nest Silk Silky White Truffle Hydrogel Lace Mask is a two-piece, upper and lower part hydrogel lace mask that perfectly fits the facial contours, and boosts skin elasticity and firmness.

**Animated Mask**

SNP Animal Otter Aqua Mask is an animated face mask that became a trend on social media. Subsequent designs, like cultural designs and cartoon characters have started to launch.

**Glow-in-the-Dark**

Missha Spider Nightglow Mask is a special-edition mask with an ergonomic design that provides an easy and quick application and 'perfect' adherence on the face, curving areas such as the nose and chin.
Spotlight launches in 2016-2017

• New innovations within facial masks
Time is of essence

L’Oreal Pure-Clay Clear & Comfort Mask

super-charged pure clay mask contains Seaweed to clear and comfort your skin in just **10 minutes**.

creamy, non-drying formula leaves skin feeling clean, soft and comforted while addressing skin’s imperfections to reveal a purified, even and radiant complexion.

Saborino Night Mask

5-in-1 product combining the functions of lotion, emulsion, serum, cream and pack to easily complete skincare routine in **60 seconds**.

contains vitamin C derivative, vitamin E, a fragrance of chamomile orange and moisturising ingredients like botanical extracts to intensively moisturise skin and leave it firm and healthy.
In-shower mask format

**Estée Lauder Radiant In-shower Steam Facial Mask**

Pomegranate in-shower facial mask to apply with hot water, allowing the steam to open pores. The paste texture sticks to skin even while showering, and is designed to be rinsed off after five minutes.

**Make P:rem In-Shower Face Mask**

Drip-free and hydrating gel formula that is designed to envelop and adhere to the skin and provide hydrating relief for the face while in the shower.
Hectic It’s Pack Time Mask

Specifically designed for late risers and those with hectic mornings.

**AM 07:00 Quick Morning Mask**
Vitamin complex/prevention of greasy bangs/natural protector.

**PM 02:00 No Sebum Moisture Pad**
Oil paper + mist + all in one / ingredients effective for sebum removal / anti-sebum.

**PM 10:00 STEP Soothing Mask**
Keep calm and moisture / Step 1 soothing + Step 2 moisture / Glacier water moisture pad.

**AM 01:00 Night Care Mask**
Ceramide + Silk amino acid /ramie fabric cream coating.
## Premiumisation with aesthetics functions

### Golden acupressure for lifting

Mediheal Black Label Goldenchip Mask

- Gives lifting and anti-ageing effects at the same time.

### LED Mask

Aduro LED Mask

- Is a reinvention of the traditional facial mask, brought up-to-date through the use of modern day LED light technology. The patented design follows the contours of the face, offering a full facial rejuvenating experience, for a range of skin imperfections and signs of ageing.

### Injection mask

Wellage Vitablue Injection Mask

- Needs to be infused with vitamins right before the use.
Multi-masking trend picks up

Skin Inc Facial In-a-Flash Multimasking Bento Set

This two-piece mask is ideal for consumers who suffer from different skin concerns on different parts of their face. The range includes masks that can: lessen the appearance of lines around the eyes, or boost antioxidants in blackhead-prone areas.

Innisfree Jeju Volcanic Color Clay Mask

The line includes a new, seven-piece range of facial masks. Each is a different colour and solves a specific skin concern. Users can 'multimask' by applying different masks to various facial zones to tackle certain skin problems.
Product extensions to complement facial masks

69%* of skincare users seek a sheet mask as a solution when they feel their skin is dry, and their ordinary moisturising cream is not enough to hydrate.

**Mask Primer**

**Origins Maskimizer Skin-Optimizing Mask Primer**

is a priming mist with marine algae complex to help hydrate, soften and optimise the appearance of skin, leaving it fully prepped to enhance the mask experience.

**MakeOn Skin Light Therapy**

is available in three different lights – red, blue and yellow. Use this device over the sheet mask to boost the absorption of nutrients.

*Source: Mintel GNPD, BPC, *Sure Magazine 2016 April issue
Facial Mask
Opportunities in Asia
Important points and key learnings
Key takeaways

Formats drive usage

• Asian consumers are the biggest users of facial masks and include masks as part of their regular skincare routine. They are the key target markets, and the most challenging markets to sustain consumer interest in facial masks with new product developments.

• Key facial mask innovations range from the traditional paper sheet masks to different fabrics and formats to drive usage and efficacy.

• Innovative formats are key to sustain interest and usage levels, but convenience remains the top consideration factor for purchase.
Key takeaways

**Premiumisation has growth potential**

- Premiumised segment opportunities lie in ‘high-end sheet masks’ that incorporate aesthetic salon/plastic surgery equivalent treatments (that can be used at home), differentiating itself from the luxurious versions of moisturising sheet masks. This is especially important for Asia, where micro cosmetic surgery is common and deemed as a trend.

- Consumer upgrade is increasingly prominent in Asia, with the rise of a middle class with disposable income. Premiumisation holds great potential across different Asian countries, such as China and Thailand.

- Visible instant results are key in premium facial masks, to appeal to consumers who are willing to splurge more on higher quality masks.
Key takeaways

**Skincare routines and ingredients drive NPD**

• Consumers curate their own facial mask routines according to their skin types, lifestyles and products offerings. For example, one mask a day; two masks a day; multi-masking; sheet mask use after a modelling mask etc. This will drive NPD with different positioning claims and opportunities, as well as ingredients to match different facial mask formats that deliver maximum efficacy.

• Western brands can look to include local ingredients to appeal to consumers who don’t currently use facial masks, and can slowly introduce Asian ingredients that are increasingly of interest to consumers in the West.

• The facial mask trend will continue to gain strength in the West, as it grows to become part of a regular beauty routine for consumers.
Join us!

Interactive product demonstrations in the Innovation Zone

Tuesday - Thursday
Morning session: 11:00 – 11:30
Afternoon session: 14:00 – 14:30
Thank you for listening!

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