

# Health & Personal Care



April 2010      US\$395



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# HEALTH & PERSONAL CARE

## Supplier capability in China

### EXECUTIVE SUMMARY

Suppliers of health and personal care in China are setting sights on overall business growth throughout the rest of 2010. With economic conditions pointing to recovery, makers are looking forward to higher export sales as well as carrying out aggressive production upgrades.

In fact, raising capital expenditure up to 50 percent is part of the agenda of many interviewed companies in this report. In most cases, the additional budget is spent on automating manufacturing steps to boost output as orders rise again.

Further, prices are likely to remain stable, contrary to the trend in previous months when suppliers were either imposing cuts to stay competitive or markups to recoup margin losses. This is also partly because of stabilizing material costs.

The following are some of the trends we see in China's health and personal care industry:

- Designs with multiple functions and improved user comfort will be the R&D highlights of personal grooming appliance makers. Accuracy and response speed, meanwhile, top the product development efforts of health monitor specialists.

- While many companies are going back to traditional export markets such as the US and Europe, some continue to explore opportunities in South America and Africa to shore up overseas revenue.

- Regardless of operation size, more China manufacturers are utilizing imported and automated machines to increase capacity while lessening reliance on manual labor. Examples of these are surface-mount equipment from South Korea and CNC bristle implant machines purchased in Germany.

- Small and midsize enterprises offering low-end and midrange designs continue to dominate China's health and personal care supplier base. In the

massage chairs and health monitors segments, such makers comprise 90 percent of the total number of companies.

- The majority of industry players are still OEM- and ODM-driven. An increasing number of manufacturers, however, are venturing into the OBM line, including tier 1 specialists of electric toothbrushes and massage chairs.

This updated report covers five major product lines of China's health and personal care industry, namely massagers, health monitors, hair-removing and styling appliances, and toothbrushes.

For each category, the latest design trends, functions and features are provided. The report also highlights key factors that differentiate the export price and performance of low-end, midrange and high-end releases. The industry demographics and export hubs per product segment are likewise discussed here.

Projections for the next six to 12 months on overseas sales, capacity expansion plans and R&D focus are detailed in the Supplier Survey.

The Industry Overview section underscores the overall export sales and growth projections now that the global economy is entering the post-recession phase. It also provides information on the strengths of Guangdong, Fujian and Zhejiang provinces, the key sourcing centers.

Reflecting the industry structure, 97 percent of makers interviewed for this report are located in these provinces. The majority of these companies are manufacturers with direct export rights.

Further, more than 90 percent of the featured suppliers are mainland China-owned, and the others are Taiwan- or foreign-invested. The majority has been offering health and personal care products for more than 10 years.

### In this report

- 30 in-depth company profiles
- 14 additional suppliers
- 132 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics & charts

### METHODOLOGY

To produce this report, Global Sources surveyed a wide range of suppliers. Rather than focus simply on high-profile makers, we compiled a representative sample of large, midsize and emerging manufacturers. All profiled companies are export-oriented professional suppliers that may or may not be clients of Global Sources.

The selection of suppliers is designed to reflect the composition of the industry in China in terms of geographic spread, business type and company ownership.

For each company profile, our research teams interviewed senior executives and export managers who discussed their recent performance and provided price, R&D, production and export forecasts for the next 12 months. The interviews were done in-person, by phone or e-mail.

In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials, including their production and export statistics, and a breakdown of exports by product type and market. Our production checklist details the product-specific manufacturing capabilities of each supplier.

All suppliers participated in a survey designed to provide insight into product and price trends, and challenges facing the industry in the next 12 months. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

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## INDUSTRY OVERVIEW

Health and personal care suppliers in China are anticipating higher outbound sales in 2010, as several factors positively affect current export conditions.

Prices, for example, are likely to remain at current levels this year. This is mainly because material costs have been stable amid growing supply in previous months.

In January 2010, the average outlay for PE was \$1,628 per ton. Total output rose 7 percent in 2009, with December figures alone showing an increase of 28 percent YoY to 809,000 tons.

PP costs were at \$1,614 per ton at the start of 2010. The cumulative annual production last year was 8.2 million tons, or 11 percent more than in the previous 12 months. December 2009 saw the output of this plastic type at 780,000 tons. This represented an increase of 33 percent from the same period in the previous year.

The average cost of ABS was \$2,029 per ton in January 2010. Supply is expected to remain stable in coming months.

Further, suppliers are reverting to traditional markets, while continuing to explore business opportunities in alternative locations. The latter step was originally implemented to sustain financial viability amid sluggish demand from the US and the EU last year.

To better meet the requirements of South America-based customers, companies are addressing the communication barrier, which is the key challenge to expansion into the region.

They do so by hiring personnel who can speak Spanish or Portuguese, the primary languages used in this location.

In addition, some makers are modifying certain parts and specifications of their products to meet regional requirements.

Electric shavers, for instance,

need to run on 110V at 50/60Hz and be fitted with type A, B or E plugs. Manuals must be translated into Spanish or Portuguese.

Low-end and midrange models without certification currently dominate China's exports of health and personal care products to South America, although some units conform to standards of the importing country.

Brazil- and Chile-bound designs, for instance, comply with UCIEE and CEMEC safety guidelines, respectively.

The selection includes heart rate monitors, bathroom scales, small massagers, electric shavers, and hair dryers and straighteners.

### Increased automation

In line with the positive expectations for overseas shipments, China suppliers of health and personal care items are investing in advanced equipment for their factories.

The step boosts output production capability, while minimizing the impact of the current labor shortage.

Zhongshan Camry, for example, adopted surface-mount equipment from Samsung of South Korea. This enabled the maker to raise daily output from 10,000 bathroom scales to 50,000 and expand its selection to include slim 16mm designs in addition to 26 and 30mm units. Further, it allowed the supplier to slash the size of its PCB insertion department by 70 percent.

The company has also shifted from manual to automatic calibration, thereby improving product accuracy and reaction times.

### Supplier summary

Suppliers surveyed	30
Export sales	\$347.4mn
Export ratio	71%
OEM business	53%
Capacity utilized	72%
Annual R&D spending	\$40.1mn
Full-time employees	22,744

Data: All surveyed suppliers

Small and midsize makers in particular are increasingly turning their attention to automated facilities.

Imported machines are preferred as these are more efficient than domestic versions. A number of companies, however, are developing equipment in-house, as this allows better control over performance parameters while increasing suitability for specific tasks.

Previously, the utilization of automated facilities was typical only among large companies capable of shouldering the heavy financing required. With annual sales usually exceeding \$50 million, these tier 1 enterprises can allocate 2 to 5 percent for equipment upgrades.

Investment at the same level can have a significant impact, however, on operations earning less than \$1 million per year. Because they generate lower margins, the ROI period for smaller suppliers is even longer.

Providing additional impetus for the shift to automation is the difficulty encountered by makers in maintaining a full complement of workers. Guangdong province-based companies in particular are currently facing this scenario.

### Major customers

Company	
Ruian Tianlun	Auchan (France); Metro, Lidl (Germany)
Shenzhen Breo	Homedic (UK); Ogawa, Osim, Oto (Malaysia)
Xiamen Wellrelax	Lidl (UK); Target, 306 (US); Li & Fung (Hong Kong)
Zhongshan Transtek	Leifheit (Germany), Taylor (US), Salter (UK)

### Care Electronic (Scale) Co. Ltd

Manufacturing 150,000 units in a month, health and personal care products account for 60 percent of Care's total annual sales of \$6.5 million. Focusing on health monitors, the supplier sends 75 percent of output abroad, half of which under OEM contracts while the rest are ODM orders.

The EU and the Asia-Pacific region receive 30 percent of exports each. North, Central and South America, Eastern Europe and the Middle East share the balance.

Apart from health and personal care

models, the company ships jewelry, and pocket and kitchen scales.

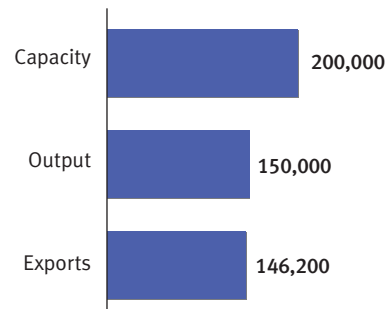
In the following months, its nine-man R&D team will focus on multifunction designs with a budget of \$149,500. Additionally, Care will improve operating efficiency to boost competitiveness. These steps will be backed by an increase in capital expenditure of up to 50 percent.

Such measures, together with a recent price markup of less than 5 percent, create a positive outlook for the next 12 months, with Care expecting export sales to grow 20 percent.

#### Profile

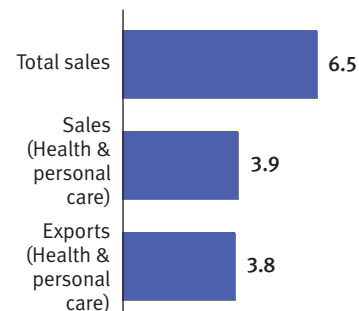
##### Production

units/mth



##### Sales

\$mn/year



#### Contact details

##### Business contact

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##### E-mail

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##### URL

www.care-scale.com

www.globalsources.com/carescale.co

##### Address

19-23 Civilization Road, Second Industrial Park, South Area, Zhongshan, Guangdong, China

#### Company facts

Year established	2000
Business type	Manufacturer
Company ownership	Mainland China-owned
Head office location	Zhongshan (Guangdong)
Number of factories	1
Factory location(s)	Zhongshan (Guangdong)
Total factory area	8,000sqm
No. of full-time employees	300
No. of R&D/design staff	9
No. of QC staff	15
Annual sales (all products)	\$6.5mn
Annual R&D spending	\$149,500
ISO certification	Yes

#### Sales & output: Health & personal care

Annual sales	\$3.9mn
Share of total sales	60%
Annual export sales	\$3.8mn
Total monthly capacity	200,000 units
Average monthly output	150,000 units
Capacity utilized	75%
Average monthly exports	146,200 units
Export ratio	97%
OEM % of exports	50%
ODM % of exports	50%
OBM % of exports	—
Other products made	Jewelry, pocket, kitchen, luggage and promotional scales, and food thermometers

Capability

Production checklist

Makes molds in-house	Yes
Makes motors in-house	No
Makes sensors in-house	No
In-house PCB assembly	Yes
Plastic-injection machines	15
Cutting machines	2
Bending & punching machines	4
Voltage testers	5
Current-leakage testers	2
Automated bristle-implanting machines	—

Exports by product

Massagers	—
Hair-styling appliances	—
Hair-removing appliances	—
Toothbrushes	—
Health monitors	100%

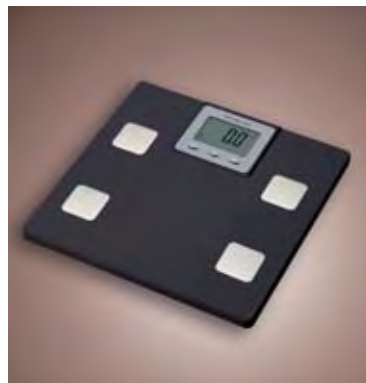
Exports by market

North America	15%
European Union	30%
Europe (non-EU)	10%
Asia-Pacific	30%
Middle East	2%
Central/South America	13%

Survey

- **Export prices**  
Increased
- **Export price increase**  
Less than 5%
- **Export sales**  
Increase more than 20%
- **Target market**  
North America
- **Capital expenditure**  
Increase up to 50%
- **Major challenge**  
Design copying/piracy
- **Export capability**  
Improve operating efficiency
- **R&D focus**  
Multiple functions

Popular export models



Health monitor

Model	CR6331
MOQ	1,000 units
Packaging	Gift box
Delivery	30 days
Price	•

**Description:** Body analyzing scale; 6 to 8mm tempered glass, ABS or stainless steel; 150kg capacity; 100g increment; 5 to 50% body fat, 20 to 70% body hydration, 15 to 75% body muscle, 4 to 15% body bone and 500 to 5,000 calorie measurement ranges; tap or manual switch



Health monitor

Model	CS005
MOQ	1,000 units
Packaging	Gift box
Delivery	30 days
Price	•

**Description:** Bathroom scale; 6 to 8mm tempered glass, ABS or stainless steel; 150kg capacity; 100g increment; 78x36mm LCD; 28x29x0.6cm platform with photo; tap switch, auto-zero and shut-off, overload and low battery indicators; 3V CR2032 lithium battery; 14.9kg; CE



Health monitor

Model	CR1127
MOQ	1,000 units
Packaging	Gift box
Delivery	30 days
Price	•

**Description:** Talking bathroom scale; 6 to 8mm tempered glass, ABS or metal; 150kg capacity; 100g increment; backlight; tap switch; auto-zero and shut-off, overload and low battery indicators; 78x36mm LCD; 33x0.6cm platform; 16kg

• Information not disclosed

## PRODUCT GALLERY

### Massagers



**Hangzhou Shouken**  
(profile page 46)  
**Model:** A1H  
**MOQ:** 10 units  
**Packaging:** Carton with belt  
**Delivery:** 10 days  
**Price:** •  
**Description:** Office massage chair; 30W; leather and oak; vibration and kneading; CE



**Hangzhou Shouken**  
(profile page 46)  
**Model:** A6D  
**MOQ:** 10 units  
**Packaging:** Carton with belt  
**Delivery:** 10 days  
**Price:** •  
**Description:** Massage chair; 160W; leather; separate foot massager; airbag can be remote-controlled; 2 intensity levels; 2 airbags in waist with free swing function; 5 sets of automatic massage modes; back angle can be adjusted to 118 degrees; CE



**Hangzhou Shouken**  
(profile page 46)  
**Model:** S700  
**MOQ:** 10 units  
**Packaging:** Carton with belt  
**Delivery:** 10 days  
**Price:** •  
**Description:** Handheld massager; 12V, 40W; heating and cooling functions, traditional vibration massage techniques, 12 intensity levels, 3 sets of interchangeable massage heads, buffer in handle to lessen tactile feedback; CE



**Hangzhou Shouken**  
(profile page 46)  
**Model:** H200  
**MOQ:** 10 units  
**Packaging:** Carton with belt  
**Delivery:** 10 days  
**Price:** •  
**Description:** Head massager; 100 to 240VAC or 12V battery, 8W; 2 massage modes, 5 airbags and 4 vibration motors; MP3 player, radio, choice of built-in speakers or earphones; CE



**Hangzhou Shouken**  
(profile page 46)  
**Model:** B800  
**MOQ:** 10 units  
**Packaging:** Carton with belt  
**Delivery:** 10 days  
**Price:** •  
**Description:** Massage cushion; 30W; with dual-purpose home and car power supply, new 3D loader, special light, heading massage ball and back vibration; CE



**Hangzhou Shouken**  
(profile page 46)  
**Model:** A6I  
**MOQ:** 10 units  
**Packaging:** Carton with belt  
**Delivery:** 10 days  
**Price:** •  
**Description:** Massage chair; PU or genuine leather; 230W; 6 program options and simultaneous leg mechanical stretching, 15 airbags, 20-nanosecond synchronizing function for massage intensity to follow music rhythm, auto-scan on shoulders and acupoints according to body

• Information not disclosed

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