

An Analysis of Mainstream Consumer Product Trends and Their Drivers in China For 2025

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Abstract. With the development of the economy, several innovations are coming into the public's view. Some products gain rapid popularity, which are in demand by consumers. Firstly, Jellycat's dolls became famous. The main idea of the company to make the dolls is to combine luxurious quality, a unique appearance, and a playful personality. And then, everyone has a labubu, because its appearance is cute in an awkward way. The attractive points that make people want to buy these goods. Thus, this research collects these novelty items and related data. Then, analyzing these data and making a questionnaire survey for the citizens to investigate the relation between these merchants and the reasons how they became customers' favorite. As a result, the data shows that most people are attracted to lovely designs. Through research, people favor these highly popular products because their visually appealing appearance, curiosity about new things, and emotional value are fulfilled.

Keywords: Product Innovation; Attractive appearance; Unique personality; Emotional value.

1. Introduction

Nowadays, as China shifts from rapid growth to high-quality development, consumer demand has evolved from focusing on “whether there is” to “whether it is good”, making consumption upgrading a long-term trend [1]. In other words, the firms cannot earn much money from the basic products, so they change the direction to some goods which are more attractive to people by high quality or high emotional value. During this period, a group of citizens, which is named Generation Z, defined as the people who were born between the mid-1990s and early 2010s, with a population of about 260 million in China, accounts for 19% of the total population and contributes nearly 40% of consumption, becoming the driving force of the new wave of consumption upgrading. Their consumption reflects strong social and emotional needs, leading to a trend of quality and emotional consumption that significantly accelerates the upgrading of society's consumption [1].

Because of high demand for social and emotional needs, China has transitioned from a production-oriented society to a consumption-oriented one. The purpose of consumption is no longer solely for practical use; consumers now also attach importance to the emotional value, emotional connections, and taste contained in the goods [2]. Research wants to explore the reasons why a product can become popular, and what kind of items have a strong appeal to today's main consumer groups. Through using the economics aspect to cut in, detecting the main ideas and attractive points behind the products. This paper starts from several popular and successful companies: Jellycat and Pop Mart. Firstly, comprehending the two corporations' background and creative concepts. Secondly, detecting the details from famous products themselves can be separated into three parts: appearance, potential ideas, and value for people. In addition, using existing literature and data to recognize consumers' thoughts. In the end, summarize all the key points and get the final result.

2. Commodity Design

The research aims to explore the insight behind the goods. One of the most significant and obvious entry points is appearance.

In Jellycat, the dolls are pretty lovely. Their fur is soft because the company used skin-friendly fabric, and “Every Jellycat toy is tested to the European Safety Standard (EN71 parts 1, 2 & 3), the

American ASTM standard, and the ISO standard, for all ages [3].” Thus, they make people feel comfortable and safe. Jellycat offers over a thousand different types of plush toys. A variety of styles provide buyers with a surprising feeling and a curious emotion for the novel products. Furthermore, every toy was provided in different sizes, including most of the consumers’ favorites. The special tag for each doll is also the most attractive part; the swing tag is not only to signify the material, care instruction, and company, but also to show its name, birthday, and a warm sentence to the consumer.

Labubu’s design is inspired by Nordic folklore. It features tall rabbit-like ears, big round eyes, and a smirk with serrated teeth, giving it an “ugly-cute” look. Some color variants have special meanings: red for love, blue for hope. All Labubu figures are made by Chinese toymaker Pop Mart and sold in hand-sized “blind boxes” that can keep the contents a mystery [4]. Labubu’s face is made of PVC plastic for durability and detail, while the body and limbs are covered in plush fabric in various colors [5], which will give the toy a soft, fluffy feel. By 2025, over 300 Labubu figurines had been released, ranging from 8 cm vinyl figures (US\$15) to 79 cm “mega” editions (US\$960). In June 2025, a 1.2 m tall mint-green Labubu sold for \$170,000 at the first official Labubu auction in Beijing [6]. Thus, all official Labubu products are of high quality in both design and materials.

2.1. Discover the Similar Points About Appearance Between These Goods

Between Jellycat and Labubu, there are several portions that are similar. From the perspective of appearance, they are both adorable. For Jellycats, the central design goal is to make a lovable image, which makes people feel warm and comfortable. Although Labubus are named as “ugly-cute”, they are still regarded as “adorable characters”. Both of them enhance their cute and endearing features in their looks. One of the other obvious similarities is that they both have soft bodies and plush fabric to emphasize the comfort of touching. In addition, these two companies were more focus on highlighting the product’s safety standards; not only use plush material to present a better texture, but they also tested the dolls in several official institutions. Moreover, Jellycats and Labubus have hundreds or even thousands of different designs, colors, and sizes, which always bring surprises and curiosity to consumers.

2.2. Common Characteristics for Building Product Popularity

Jellycat’s innovative designs, which often incorporate whimsy and humor, have set them apart from other plush toy manufacturers [7]. Meanwhile, it has gained phenomenal popularity in the Chinese market by combining the emotional system of super soft touch and scenario-based consumption experience [8]. Labubu has certain characteristics that distinguish it from Jellycat. Labubu has gained fame through its “ugly-cute” aesthetic, and this distinctive appearance has opened up a new fashion trend that has driven widespread consumer enthusiasm. Pop Mart strikes a balance between cultural expression and global appeal by designing hybrid characters that integrate East Asian aesthetics with global visual styles, thereby attracting young consumers worldwide [9]. The analysis of commodity design demonstrates how unique appearances contribute to brand recognition and consumer enthusiasm. Nevertheless, the external appearance is only the surface of these brands’ success. The following section will therefore focus on deeper layers: the motivation and strategies of Merchandise Producers.

3. Main Idea Behind the Products

During the conclusion part for toy’s appearance, the study already mentioned that Jellycat has gained phenomenal popularity in the Chinese market by combining the emotional system of super soft touch, anthropomorphic cute design, and scenario-based consumption experience [8]. Hence, one of the core ideas is to achieve emotional healing through using the super-soft touch fur and making the adorable design. Furthermore, Jellycat’s core mission is to create enchanting plush toys that bring joy, comfort, and imagination into people’s lives [7]. As a result, Jellycat concentrates on embedding emotional value into its design philosophy, which has become a defining factor in its sustained global

success. Within Pop Mart, every IP is distributed through blind boxes, where each series contains multiple figures of varying colors and styles. The acquisition process depends on luck, as consumers must rely on chance when unboxing. Pop Mart's blind boxes are described as products "full of unknowns, mysteries and uncertainties", where the surprise of opening is a central appeal [10]. With the growing popularity of blind boxes, Pop Mart offers "a symbolic world and emotional space through collectible figurines, blurring the boundaries between products and individuality, commodities and culture." [9] The reasons for Pop Mart's phenomenal popularity are closely tied to contemporary consumers' growing demand for emotional value. The company recognized this opportunity and deliberately designed its characters with emotional neutrality—silent, ambiguous, and not narratively fixed. As a result, they function as 'emotional placeholders,' inviting consumers to project their own feelings and personal interpretations onto the figures [9]. As a consumption strategy, blind boxes stimulate repeat purchase through IP co-branding, limited editions, and hidden designs, creating the well-known "everything can be a blind box" craze [11]. For the special IP Labubu, it is found that the core factors of Labubu's popularity are star/KOL effect, globalization co-branding strategy, and unique design, while consumers' emotional needs, social needs, and other multiple motives jointly drive the consumption behavior [12].

According to the comparison of the ideas between these films, the research revealed some minor differences between Jellycat and Labubu. Jellycat prefers to create cultural symbols by emphasizing emotional healing values, and its adaptability to China's culture provides important insights for the advancement of China's cultural and creative industries [8]. However, Pop Mart strikes a balance between cultural expression and global appeal by designing hybrid characters that integrate East Asian aesthetics with global visual styles [9]. The same points between the two companies are that they both depend on characteristic design and emotional value to attract Generation Z.

4. The Supporting Role of Commodities in Consumers' Lives and Emotions

In the previous part, the study examined producers' motivations. This section shifts to the consumer perspective, focusing on the value these products bring to people's lives. From buyers' viewpoints, the appeal of Jellycat and Pop Mart lies not only in design but also in the emotional and social roles they play. Specifically, these products provide comfort, strengthen social identity, enable personal expression, and create joy through surprise, illustrating the diverse value that sustain their popularity among youth.

4.1. Emotional Healing Plush Toys/Collectibles Act as "Emotional Companions"

Many consumers rely on plush toys and collectibles as "emotional companions" that provide comfort, stress relief, and a sense of companionship. Research in psychology supports this therapeutic effect: even in young adulthood, having a beloved soft toy or other attachment object can help regulate emotions and reduce stress. For example, one recent experiment found that college students permitted to hold their comfort object during a stressful task showed better physiological stress recovery than those who could not suggest that tactile contact with a plush or blanket can indeed facilitate emotional recovery [13]. These kinds of merchants essentially simulate the warming and soft touch feeling and security one would get from their lover. Consumers often say they buy these products because they're cute and healing, or because they can make them feel less lonely. In fact, holding a plush can trigger feelings of calm and safety, which is why some adults even sleep with teddy bears for comfort.

4.2. Social Identity & Group Belonging

Beyond personal comfort, collectible toys (especially trendy blind-box figures) function as a form of social currency that helps young consumers build identity and community. Sociological research shows that collectors often form tight-knit communities and feel a sense of belonging through their hobby – the shared rituals and exchanges around collecting bring people together [14]. In the case of blind-box collectibles like Pop Mart figures, the experience is highly social. Many bloggers have

gained rapid popularity by filming blind box unboxing videos. This participatory culture turns the collectibles into badges of group membership. One marketing professor observes that unboxing blind boxes can become a communal event: people even gather with friends to open boxes together, forming a sense of community and identity around their favorite characters. Indeed, within collector communities, having a rare item can also serve as a form of social capital that elevates one's standing [15]. Consumers often mention that being part of this collector culture makes them feel included in a suitable group. In interviews, they say things like "it's become a shared hobby with my peers". In short, collections help fulfill social needs: they act as identity markers and foster group belonging by connecting people through a common passion.

5. Conclusion

This study examined the success of Jellycat and Pop Mart's Labubu by analyzing their design strategies, brand motivations, and consumer values. The results suggest that their popularity stems from combining unique appearances with strong emotional and social functions. These products not only provide comfort and companionship but also act as cultural and social symbols, helping young consumers express their personality and strengthen group belonging. Both cases reflect that nowadays, Generation Z seeks goods that deliver emotional resonance, cultural creativity, and personal meaning beyond practical use.

Nevertheless, the research faces certain limitations. First, the study relied heavily on secondary sources and a small-scale survey, which may have lacked diverse consumer groups. Second, focusing on two representative brands, while insightful, may overlook other companies and product categories that shape similar trends.

Future research should broaden the sample and conduct cross-cultural comparisons to test whether these emotional and social mechanisms apply across global markets. Moreover, examining the influence of digital platforms, influencer marketing, and evolving youth aesthetics could yield deeper insights. Overall, this study underscores how design innovation and emotional value jointly sustain the rapid rise of consumer products among younger generations.

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