

## Beauty and Personal Care Accessories - US - June 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The BPC (beauty and personal care) accessories market experienced gains in 2017 (est), driven by strong consumer interest and increased availability of make-up brushes and sponges. Going forward, brands can nurture interest by positioning themselves as experts and providing women with the tools they need to confidently apply make-up."

**- Margie Nanninga, Beauty & Personal Care Analyst**

This report looks at the following areas:

- Topical products outpace BPC accessory sales
- Price-conscious shoppers make it hard to differentiate offerings

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Beauty and Personal Care Accessories - US - June 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know

Definition

### Executive Summary

Market overview

BPC accessories experience moderate growth driven by make-up accessories

Figure 1: Total US sales and fan chart forecast of beauty and personal care accessories, at current prices, 2012-22

The issues

Topical products outpace BPC accessory sales

Figure 2: Percentage change in BPC accessories and topical product sales, by segment, 2016 (est)

Price-conscious shoppers make it hard to differentiate offerings

Figure 3: Purchase influencers – Price and none of the above, April 2017

The opportunities

Combat negative perceptions including concerns over germs

Figure 4: Attitudes regarding germs and replacement toward BPC accessories, April 2017

Non-disposable make-up sponges present opportunity

Figure 5: Select attitudes toward non-disposable make-up sponges, by age, April 2017

Use products, marketing to help women feel confident in their beauty skills

Figure 6: Attitudes regarding learning about make-up brushes, by Millennial generation, April 2017

What it means

### The Market – What You Need to Know

BPC accessories experience steady growth

Make-up accessories drive sales, hair accessories fall flat

Topical products garner higher spend, experience faster growth

Trends in hair, make-up, shower products influence BPC accessory sales

### Market Size and Forecast

Historic and projected sales performance

Figure 7: Total US sales and fan chart forecast of beauty and personal care accessories, at current prices, 2012-22

Figure 8: Total US sales and forecast of beauty and personal care accessories, at current prices, 2012-22

### Market Breakdown

Hair accessories dominate the market but experience slower growth

Figure 9: Share of BPC accessories market, by segment, 2017 (est)

Figure 10: Percentage change of sales growth, by segment, 2013-17 (est)

### Market Perspective

Topical products garner larger share, experience faster growth

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Beauty and Personal Care Accessories - US - June 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 11: Share of BPC accessory sales compared to topical products, by segment, 2016 (est)

Figure 12: Percentage change in BPC accessories and topical product sales, by segment, 2016 (est)

## Market Factors

Sales of color cosmetics are thriving; technology, trends shape market

Figure 13: Total US retail sales of color cosmetics, by segment, at current prices, 2014 and 2016

Preferences for natural looks drive haircare sales

Figure 14: Attitudes toward haircare products and routines, January 2017

Soap, bath, and shower products go premium

Figure 15: Correspondence analysis – Product benefits, November 2015

Methodology

## Key Players – What You Need to Know

Leading brands lose share to smaller players

Blender sponges, eco-friendly bath accessories on-trend

Leading brands, traditional make-up accessories fall flat

More diverse blenders, brands focus on education, cleaning

## Company and Brand Sales of Beauty and Personal Care Accessories

Conair, Newell Rubbermaid lead market but struggle to grow

Paris Presents, J.A. Cosmetics gain share

Sales of beauty and personal care accessories by company

Figure 16: Sales of beauty and personal care accessories, by company, 2016 and 2017

## What's Working?

Value brands, professional claims stand out in make-up accessories

Figure 17: MULO sales of select value-brand and professional claims in make-up applicators, 52-weeks ending Feb. 19, 2017

Non-disposable make-up sponges/blenders are on-trend

Figure 18: MULO sales of select non-disposable sponges, 52-weeks ending Feb. 19, 2017

Eco-friendly claims perform well in soap and shower accessories

Figure 19: MULO sales of select eco-friendly positioned soap and shower accessories, 52-weeks ending Feb. 19, 2017

Hair accessories for Black women a bright spot in the segment

Figure 20: MULO sales of select hair accessories targeted at Black consumers, 52-weeks ending Feb. 19, 2017

## What's Struggling?

Leading brands struggle in hair, soap, and shower accessories

Figure 21: MULO sales of select leading hair accessories and soap and shower accessories brands, 52-weeks ending Feb. 19, 2017

Traditional make-up accessories stagnant as applicators drive growth

Figure 22: MULO sales of sharpeners, cosmetic storage, and eyelash curlers, 52-weeks ending Feb. 19, 2017

## What's Next?

Blender sponges get more diverse

Focus on cleaning accessories, avoiding germs

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Beauty and Personal Care Accessories - US - June 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Education becomes crucial to reaching younger adults

### The Consumer – What You Need to Know

- Hair brushes and combs commonly used, but use tapers off with age
- Bath accessories reach niche audiences, younger adults are core users
- Most women use make-up accessories; staples benefit from frequent use
- Reliance on mass merchandisers and drug stores underscores functional nature
- Consumers remain price-driven, more engaged when buying make-up accessories
- Lack of familiarity, negative perceptions challenge blender sponges
- BPC accessories suffer from infrequent replacement, evoke fear of germs

### Hair Accessories Usage

Hair brushes and combs are commonly used but lack engagement

Figure 23: Hair accessories usage, April 2017

Women over index for usage, use tapers off with age

Figure 24: Hair accessories usage, by all and women by age, April 2017

Hispanics report strong use, Black adults rely on combs, bobby pins

Figure 25: Hair accessories usage, by race/Hispanic origin, April 2017

### Bath Accessories Usage

Bath accessories reach niche audiences

Figure 26: Bath accessories and hair accessories usage, April 2017

Younger adults are core users, gender dictates product choice

Figure 27: Bath accessories usage, by age and gender, April 2017

Hispanics over index for bath accessories usage

Figure 28: Usage of select bath accessories and hair accessories, by race/Hispanic origin, April 2017

### Make-up Accessories Usage and Frequency

Most women use some type of make-up accessory

Powder, eyeshadow brushes are most mainstream make-up brushes

Make-up brush cleaners, non-disposable sponges gaining traction

Figure 29: Make-up accessories usage – Any usage (net)\*, April 2017

Make-up accessory staples benefit from more frequent usage

Figure 30: Make-up accessories usage, by frequency, April 2017

Younger women drive make-up accessory usage

Figure 31: Usage of select make-up accessories – Any usage (net)\*, by age, April 2017

Figure 32: Regular usage of select make-up accessories, by age, April 2017

Hispanic women over index for usage, Black women lag behind

Figure 33: Usage of select make-up accessories – Any usage (net)\*, by race/Hispanic origin, April 2017

Figure 34: Regular usage of select make-up accessories, by race/Hispanic origin, April 2017

### Retailers Shopped

People turn to mass merchandisers, drug stores for BPC accessories

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Beauty and Personal Care Accessories - US - June 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Online, specialty retailers make an impact

One in 10 users have not purchased a BPC accessory in the past year

Figure 35: Retailers shopped, April 2017

Women shop at a broader variety of retailers

Figure 36: Select retailers shopped, by gender, April 2017

Younger adults shop around, older adults stick to mass merchandisers, drug stores

Figure 37: Select retailers shopped, by age, April 2017

Figure 38: Select retailers shopped, by race and Hispanic origin, April 2017

### Purchase Influencers

Adults are price-conscious when shopping for BPC accessories

Women most engaged when shopping for make-up accessories

In their words

Design, material hold weight for bath, hair accessories

Research, advertising hold minimal importance

Figure 39: Correspondence analysis – Purchase influencers, April 2017

Figure 40: Purchase influencers, April 2017

Methodology

Younger women are more discerning shoppers

Figure 41: Purchase influencers for make-up accessories, by age, April 2017

Hispanics look for value, Black women less engaged in shopping

Figure 42: Purchase influencers for make-up accessories, by race/Hispanic origin, April 2017

### Attitudes toward Non-disposable Make-up Sponges

Many women are unfamiliar with non-disposable make-up sponges

Negative perceptions challenge sales

Bright spots: sponges are good for liquid make-up, natural looks

Figure 43: Attitudes toward non-disposable make-up sponges, April 2017

Younger women more familiar with blender sponges

Figure 44: Select attitudes toward non-disposable make-up sponges, by age, April 2017

Hispanics hold mixed feelings about blender sponges

Figure 45: Select attitudes toward non-disposable make-up sponges, by race/Hispanic origin, April 2017

### Attitudes toward Beauty and Personal Care Accessories

Infrequent replacement, fear of germs hinder sales but signal opportunity

Figure 46: Attitudes regarding germs and replacement toward BPC accessories, April 2017

Few consumers seek innovations and information, highlighting functional market

Figure 47: Attitudes regarding learning and innovations for BPC accessories, April 2017

Younger Millennials seek information, interested in innovations

Figure 48: Select attitudes toward BPC accessories, by Millennial generation, April 2017

Hispanic women enjoy learning about make-up brushes

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Beauty and Personal Care Accessories - US - June 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 49: Attitudes toward learning about make-up brushes, by all, Hispanic, and Black consumers, April 2017

### Appendix – Data Sources and Abbreviations

Data sources  
Sales data  
Fan chart forecast  
Consumer survey data  
Consumer qualitative research  
Abbreviations and terms  
Abbreviations

### Appendix – The Market

Figure 50: Total US retail sales and forecast of beauty and personal care accessories, at inflation-adjusted prices, 2012-22  
Figure 51: Total US retail sales and forecast of beauty and personal care accessories, by segment, at current prices, 2012-22  
Figure 52: Total US retail sales of beauty and personal care accessories, by channel, at current prices, 2015 and 2017

### Appendix – Key Players

Figure 53: MULO sales of hair accessories, by leading companies and brands, rolling 52 weeks 2016 and 2017  
Figure 54: MULO sales of soap and shower accessories, by leading companies and brands, rolling 52 weeks 2016 and 2017  
Figure 55: MULO sales of make-up brushes and accessories, by leading companies and brands, rolling 52 weeks 2016 and 2017

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)  
**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)