

Color Cosmetics - US - July 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 color cosmetics market experienced moderate growth in 2017, which represents slower gains than those seen in 2015 and 2016. While the market is saturated and some women are turning to value brands to cut costs, opportunities to reinvigorate sales include facial make-up products that offer relevant skincare benefits."

- Shannon Romanowski, Director of Research

This report looks at the following areas:

- Many make-up consumers lack engagement with the beauty category
- Leading brands challenged as value brands encourage experimentation

**BUY THIS
REPORT NOW**

VISIT:
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

DID YOU KNOW?

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

Color Cosmetics - US - July 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

The market

Market growth estimated to slow for each segment in 2017

Figure 1: Percent change of total US retail sales of color cosmetics, by segment, 2013-17 (est)

The issues

Many make-up consumers lack engagement with the beauty category

Figure 2: Beauty clusters, May 2017

Leading brands challenged as value brands encourage experimentation

Figure 3: MULO sales of select value brand products, 52-week review period ending March 19, 2017

The opportunities

Facial make-up offering skincare benefits is in high demand

Figure 4: Skincare benefits in facial make-up, May 2017

Multipurpose products, athletic make-up reach busy, active women

Figure 5: Interest in select innovations, by age, May 2017

Shift users from the Frustrated but Engaged segment to the Beauty Enthusiasts segment

Figure 6: Make-up routine – More responses, by beauty segment, May 2017

What it means

The Market – What You Need to Know

Color cosmetics experiences mild growth

Facial make-up commands highest spend, trends determine segment gains

Women allocate more spend to make-up, while natural looks bode well

Mintel identifies four make-up consumer segments

Aging population, multicultural population alter product landscape

Market Size and Forecast

Historic and projected sales performance of color cosmetics

Figure 7: Total US sales and fan chart forecast of color cosmetics, at current prices, 2012-22

Figure 8: Total US retail sales and forecast of color cosmetics, at current prices, 2012-22

Market Breakdown

Facial cosmetics command highest spend

Figure 9: Share of color cosmetics sales, by segment, 2017(est)

Figure 10: Percent change of total US retail sales of color cosmetics, by segment, 2013-17 (est)

Color Cosmetics Consumer Snapshot

BUY THIS
REPORT NOW

VISIT: 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

Color Cosmetics - US - July 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.

Color cosmetics consumers divided into four segments

Figure 11: Color cosmetics clusters, May 2017

Figure 12: Beauty Content segment, May 2017

Figure 13: Beauty Enthusiasts segment, May 2017

Figure 14: Frustrated but Engaged segment, May 2017

Figure 15: Basic Beauties segment, May 2017

Market Perspective

Women allocating more spend to make-up

Figure 16: Mean (\$) make-up expenditures for the past three months, November 2012-November 2016

Lines between facial skincare and cosmetics continue to blur

Preferences for natural-looks bode well for make-up

Figure 17: Beauty attitudes and behaviors, May 2017

Market Factors

Growing female population signals future category growth

Figure 18: Female population by age, 2012-22

Multicultural population alters product landscape

Figure 19: Population growth of women by race and Hispanic origin, 2017-22

Key Players – What You Need to Know

Middle players lose share to smaller players and value brands

On-trend products, value brands, new facial make-up formats show growth

Leading companies, off-trend formats face challenges

Athletic, hybrid, skincare claims resonate; natural claims break through

Company and Brand Sales of Color Cosmetics

L'Oréal USA is the strongest player and growing

Sales of color cosmetics by company

Figure 20: MULO sales of color cosmetics, by company, 2016 and 2017

What's Working?

Eyebrow makeup, concealer sales benefit from current trends

Figure 21: My all-time favorite drug store makeup products by Jaclyn Hill, April 2017

Figure 22: MULO sales of select eyebrow products and concealers, 52-week review period ending March 19, 2017

Value brands minimize the risk of experimentation

Figure 23: MULO sales of select value brand products, 52-week review period ending March 19, 2017

Figure 24: Sales of select private label color cosmetics products, 52-week review period ending March 19, 2017

New facial make-up formats improve the appearance of skin

Figure 25: Select facial make-up product launches, 2017

What's Struggling?

Increased competition challenges larger players

**BUY THIS
REPORT NOW**

VISIT: 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

Color Cosmetics - US - July 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 26: Select struggling make-up products from leading MULO brands, 2014-17

Off-trend products see stagnant sales

Figure 27: Select struggling MULO make-up segments, 2014-17

What's Next?

Natural products rising in popularity

Athletic make-up, hybrid products fit in with active lifestyles

Skincare-related benefits continue to expand

The Consumer – What You Need to Know

Broad variety of formats support widespread product usage

Most women report consistent routines, some allocating more time and spend

Mass merchandisers, drug stores highly visited, specialty retailers make impact

Anti-aging, moisturizing claims in demand, age dictates benefits sought

Product innovations appeal to engaged segments

Facial Make-up Usage

Broad variety of formats supports widespread facial make-up usage

Figure 28: Facial make-up usage, May 2017

Age and income drive usage of facial make-up staples

Figure 29: Usage of select facial make-up, by age and income, May 2017

Younger women core users of newer facial make-up formats

Figure 30: Usage of select facial make-up, by age, May 2017

Hispanics use a variety of facial make-up, Black women lag behind

Figure 31: Facial make-up usage, by race/Hispanic origin, May 2017

Frustrated but Engaged users open to new facial make-up formats

Figure 32: Select facial make-up usage, by beauty segment, May 2017

Skincare Benefits in Facial Make-up

Anti-aging, moisturizing claims in high demand

Figure 33: Skincare benefits in facial make-up, May 2017

Age dictates skincare benefits sought

Figure 34: Select skincare benefits in facial make-up, by age, May 2017

Opportunities to reach Black women with skincare benefits

Figure 35: Select skincare benefits in facial make-up, by race/Hispanic origin, May 2017

Beauty segments seek differing make-up benefits

Figure 36: Select skincare benefits in facial make-up, by beauty segment, May 2017

Eye Make-up Usage

Mascara is a staple, use of eyebrow make-up growing

Figure 37: Eye make-up usage, May 2017

Women across age groups use some type of eye make-up

Figure 38: Eye make-up usage, by age, May 2017

**BUY THIS
REPORT NOW**

VISIT: 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

Color Cosmetics - US - July 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.

Hispanics use a range of products, Black women over index for eyebrow make-up

Figure 39: Eye make-up usage, by all, Hispanic, and Black women, May 2017

Beauty Content, Beauty Enthusiasts are core users of eye make-up

Figure 40: Select eye make-up usage, by beauty segment, May 2017

Lip Make-up Usage

Lipstick remains a make-up staple

Figure 41: Lip make-up usage, May 2017

Older women stick with traditional lipstick, younger women experiment

Figure 42: Lip make-up usage, by age, May 2017

Multicultural women use a broader variety of lip make-up

Figure 43: Lip make-up usage, by race/Hispanic origin, May 2017

Beauty Enthusiasts use several lip formats

Figure 44: Lip make-up usage, by beauty segment, May 2017

Repertoire of Products Used

Women incorporate a range of products into their routine

Figure 45: Repertoire of make-up products used, May 2017

Younger women use a broader variety of products

Figure 46: Repertoire of make-up products used, by age, May 2017

Hispanics most likely to use 11+ products

Figure 47: Repertoire of make-up products used, by race/Hispanic origin, May 2017

Make-up Routines

Most women investing the same time, money on make-up as in the past

Figure 48: Make-up routine, May 2017

Younger women report higher engagement in routines compared to last year

Figure 49: Make-up routine – More responses, by age, May 2017

Multicultural women increasing their engagement with make-up

Figure 50: Make-up routine – More responses, by all, Hispanic, and Black women, May 2017

Frustrated but Engaged segment spending more time and money

Figure 51: Make-up routine – More responses, by beauty segment, May 2017

Retailers Shopped

Women primarily rely on convenience and price when choosing retailer

Online retailers posing a threat to brick and mortar

Ulta and Sephora drive more traffic than department stores, other specialty

Figure 52: Retailers shopped, May 2017

Younger women willing to shop around

Figure 53: Select retailers shopped, by age, May 2017

Hispanics visit a broader variety of retailers

Figure 54: Select retailers shopped, by race/Hispanic origin, May 2017

**BUY THIS
REPORT NOW**

VISIT: 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

Color Cosmetics - US - July 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.

Beauty Enthusiasts more likely to shop around

Figure 55: Select retailers shopped, by beauty segment, May 2017

Interest in Innovations

Innovations that improve appearance of skin garner interest

Multipurpose offerings, athletic products fit women's lifestyles

Many women lack enthusiasm for innovations

Figure 56: Interest in innovations, May 2017

Innovations appeal to engaged younger women

Figure 57: Interest in select innovations, by age, May 2017

Hispanic women seek innovative offerings

Figure 58: Interest in select innovations, by all, Hispanic, and Black women, May 2017

Product innovations appeal to Beauty Enthusiasts

Figure 59: Interest in select innovations, by beauty segment, May 2017

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Appendix – The Market

Figure 60: Total US retail sales and forecast of color cosmetics, at inflation-adjusted prices, 2012-22

Figure 61: Total US retail sales and forecast of color cosmetics, by segment, at current prices, 2012-22

Figure 62: Total US retail sales of color cosmetics, by channel, at current prices, 2012-2017

Appendix – Key Players

Figure 63: MULO sales of eye cosmetics, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 64: MULO sales of facial cosmetics, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 65: MULO sales of lip cosmetics, by leading companies and brands, rolling 52 weeks 2016 and 2017

Appendix – The Consumer

Figure 66: Usage of blusher/bronzer brands, October 2011-November 2016

Figure 67: Usage of eye make-up brands (net)*, October 2011-November 2016

Figure 68: Usage of foundation/concealer brands, October 2011-November 2016

Figure 69: Usage of lipstick and lip gloss brands, October 2011-November 2016

Figure 70: Usage of mascara brands, October 2011-November 2016

Figure 71: Usage of lipstick and lip gloss formats, October 2011-November 2016

Figure 72: Make-up usage, October 2011-November 2016

BUY THIS
REPORT NOW

VISIT: 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