Beauty and Personal Care - International

February 2023

Black Haircare - US

“Haircare products straddle multiple identities, with some products viewed as purchase essentials, and others as nice-to-haves. Amid this inflationary period during which shoppers are spending conservatively, brands will want to stake the claim that their full repertoire is seen as essential must-haves that serve as foundational to personal hygiene and ...

January 2023

Clean and Conscious Beauty - US

“Beauty companies and brands simply can’t be all things to all people when it comes to defining ‘clean.’ There is a notable shift toward people aligning how and what they consume with their values. The ‘clean’ beauty movement plays into this shift and the subjectivity of its definition allows ...

Suncare - UK

"Value sales of suncare products in 2022 continued to increase, surpassing pre-pandemic levels as a result of eased international travel restrictions post COVID-19 and the 2022 heatwave. The consumer’s heightened focus on skin health is making suncare an increasingly essential step in beauty/grooming routines. While consumers continue to opt ...

December 2022

Deodorants - UK

“The deodorant category will be defined by savvy shopping behaviours in upcoming years and brands will need to propose value in order to retain their share of the market. Appealing with money-saving multipacks and remaining competitive with special offers will benefit deodorant brands. However, value encompasses more than cost and ...

Beauty Retailing - US

“Lifestyles, budgets and beauty routines are evolving. An increased focus on the various forms of value is leading consumers to make more informed purchasing decisions and look at aspects beyond price. Moving forward, product efficiency, enhanced shopping experiences and ethical practices will be key differentiators for brands and retailers and ...

November 2022

Ingredient Trends in Beauty and Personal Care - US

“With a majority of BPC users researching ingredients, safety, health and most importantly, efficacy remain at the forefront of consumers’ minds. Additionally, consumer awareness of active and natural ingredients bodes well for the category, and brands must go the extra mile to validate the effectiveness of its formulations. As the ...

Beauty Online - UK

"Despite a decline in sales, the value of the online BPC market is not set to return to pre-pandemic levels in 2022. As many consumers cut back on spend amidst the rising cost of living, there is an opportunity for brands and retailers to emphasise the price comparison abilities of ...

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The Holistic Beauty Consumer - US

“COVID-19 has driven the concept of holistic health to new levels with a focus on total wellbeing. As a result, more consumers are striving to incorporate better lifestyle habits (eg maintaining healthy diet and/or sleep schedule) to support their overall health, wellness and even beauty goals. Some consumers are ...

October 2022

Marketing to Moms - US

"Most moms put the needs of others before their own. This presents opportunities for brands to encourage moms to take moments for themselves and practice self-care so they can be at their best for their families. More can be done to encourage dads to take on a greater share of ...

Men's Personal Care - US

“After the men’s category experienced a decline in 2020 due to the COVID-19 pandemic, retail sales are expected to see significant growth in 2022, an almost 20% increase since 2020. While some of this can be attributed to a rebalance in the market and the functional nature of the category ...

Vitamins, Minerals and Supplements - US

“The majority of consumers rely on VMS products to strengthen their foundation of health. Yet, elevated usage of VMS products as a result of the COVID-19 pandemic has begun to soften. As the focus on a multidimensional approach to health intensifies, consumers will seek ways to personalize their supplementation routines ...

The Gen Z Beauty Consumer - US

“Generation Z consists of an array of young consumers at different stages of life, making them a key audience across most beauty categories. However, given their young age, Gen Z adults are particularly vulnerable to all of the uncertainty brought on by pandemic-related disruptions and record-level inflation rates, leading some ...

September 2022

The Personal Care Consumer - US

“The total personal care market is expected to see low single-digit sales growth in 2022, driven by consistent product usage and the functional nature of the category. Adjusted for inflation, however, the category struggled to maintain sales dollars, highlighting value-driven behavior. As consumers prioritize products and spending in a cost-sensitive ...

The Prestige Beauty Consumer - UK

“A combination of post COVID-19 recovery and rising prices due to inflation will boost the prestige BPC segment in 2022. However, a challenging economic environment will see consumers seeking out discounted products, or adopting trade-down behaviours. There is opportunity for prestige brands to instil purchase confidence through proving claims and ...

Black Consumers: Beauty Trends - US

Digestive Health - US

"Gastrointestinal issues continue to plague consumers on a regular basis as a result of stress, lifestyle and

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"When we think of beauty in its essence we think of sights, smells and tastes that are pleasing to us. When thinking of beauty trends for Black consumers we see that their focus it to capture that intrinsic meaning. Black men and women see beauty trends as an opportunity to ...

Colour Cosmetics - UK

"Following COVID-19, women have adopted streamlined makeup routines. However, as social occasions resume and consumers return to offices, occasions for makeup-wearing become more frequent and spend is recovering. While the cost of living crisis might hinder spending, the makeup category will have a role to play in consumers' lives as ...

August 2022

Fragrances - UK

"Post-pandemic recovery and inflation will support value growth in fragrance in 2022. A reluctance to trade down will support the prestige segment, as many look to treat themselves with affordable luxuries during times of economic uncertainty. A willingness to spend signals opportunity for innovation in personalised fragrance, which is a ...

Hand, Body and Footcare - UK

"The rising cost of living will come to define consumer spending on hand, body and footcare. However, in a crowded category where value is defined as more than product cost, brands can propose value with ingredients, wellbeing claims and skin expertise to dissuade trading down and drive usage. In innovation ...

July 2022

Marketing to Millennials - US

"Millennials are at a lifestage where they are in distinct subsegments – some becoming newly independent while others are comfortably settling into parenthood. Because Millennials are at such different stages, each with their own unique set of needs, they must be marketed to accordingly. For example, Younger Millennials aspire to ...

environmental challenges. As consumers strive to optimize their overall health and wellbeing, they are recognizing the vital role that the gut microbiome plays. Consumers seek to treat the underlying causes of digestive issues ...

Natural and Organic Toiletries - UK

"While value sales of organic health and beauty products have continued to rise, inflation and the growing importance of sustainability could threaten demand for natural/organic BPC going forward. As price sensitivities grow, value-focussed NPD can dissuade consumers from moving away from natural/organic BPC. Meanwhile, science will play an ...

Color Cosmetics - US

"After taking a steep hit in 2020 due to the COVID-19 pandemic, color cosmetic sales continue to pick back up, benefitting from the return of in-person events and less frequent usage of protective face coverings. Pent-up demand and current makeup trends are also helping to speed recovery. Looking ahead, further ...

Bodycare and Deodorant - US

"The bodycare and APDO market has shown slow yet steady growth since 2017, which can partially be attributed to the essential nature of the category and stable market penetration. While sales are expected to increase almost 7% in 2022, inflation adjustments show relatively flat growth with slow sales increases to ...

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Oral Health - US

"The pandemic provided the impetus for Americans to establish new healthy at-home rituals in personal care, which fuelled a positive change in oral care routines and products used. Advancing the idea of good oral care as a component of self-care will continue to resonate with a large constituency of consumers ...

Disposable Baby Products - US

"After seven consecutive years of declining birthrates, 45,000 more babies were born in the US in 2021 vs 2020. Parents who delayed having a baby in the early days of the pandemic finally moved ahead with their plans. In response, category sales grew by 6.2% in 2021 based ...

June 2022

Facial Skincare - US

"The facial skincare market has seen steady growth since 2017, which can partially be attributed to the essential nature of the category and stable market penetration. Thanks to an increased focus on hygiene and an intensified need for self-care, the overall category did not suffer major loses in 2020 as ...

Marketing to Gen Z - US

"Whether they are teenagers or young adults, Gen Z are in a transitory phase in their lives, as even the adult members of this generation are not yet fully financially independent of their parents. While also having to deal with the struggles traditionally associated with coming of age, Gen Z ...

Oral Care - UK

"The oral care market has risen in value for the first time since 2016 and consumers are taking a renewed interest in their oral health, seeing it as part of their general wellbeing. Although the cost of living crisis will encourage savvy shopping behaviours among some consumers, the infrequency of ...

May 2022

Gifting in BPC - UK

"The cost of living crisis will see a sharper focus on savvy shopping habits. A desire to stockpile will create demand for perennial presents that are not adorned with seasonal imagery. Anxiety triggered by a forecast recession may also help to de-seasonalise the market, particularly if brands can encourage self-gifting ...

Feminine Hygiene and Sanitary Protection Products - US

"Positive category growth trends have been influenced by a more dynamic competitive landscape and increased usage of feminine hygiene products. Motivations have moved beyond strictly functional as consumers look for feminine care solutions that support their overall health and values. Looking forward, expanding usage occasions beyond menstruation and supporting women's ...

Managing Common Illness - US

"The COVID-19 pandemic changed the way that consumers approach managing common illness. While consumers still rely on traditional OTC cough, cold, and flu remedies to treat symptoms of common illness, they have also begun to look for immune-boosting

Intimate Hygiene and Sanitary Protection Products - UK

"The sanitary protection segment of the market continues to struggle to grow its value, although an ageing population and rise in conditions that have strong risk factors for incontinence look favourable for future incontinence product value sales. The impact of

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ingredients in an effort to prevent future illness. As consumers return to ...

single-use products is increasingly front of mind for retailers and ...

April 2022

Men's Haircare and Skincare - UK

"Both men's skincare and haircare witnessed a slight value decline in 2021, driven by savvy shopping behaviours caused by concerns around rising inflation. More effective positioning of products will help to drive usage, for example, better alignment between prevalent skin concerns and specialist formats will shift males away from usage ...

Shampoo, Conditioner and Hairstyling Products - US

"The shampoo, conditioner and hairstyling products market has shown slow yet steady growth since 2017, which can partially be attributed to the essential nature of the category and stable market penetration. Although the disruptions brought on by the pandemic didn't lead to a massive decline across the total market, COVID-19 ...

Babies' and Children's Personal Care, Nappies and Wipes - UK

"The effects of strict hygiene practises have put a focus on skin health, resulting in value growth for baby moisturisers, and a demand for specialised and personalised products. As the rising cost of living stretches families' budgets, brands will benefit from value positioning. However, value positioning can go beyond price ...

Beauty Influencers - US

"The beauty industry as a whole has weathered the COVID-19 storm, and beauty influencers welcomed new audiences. Previously a young (wo)man's game, the expanding reach of influencers in the space leaves room for creators that appeal to a more diverse array of users, including men, consumers age 45+ and ...

Nail Color and Care - US

"After the pandemic lockdowns of 2020 eased, and consumers began returning to salons in 2021, the nail color and care market still thrived. There are a number of opportunities for nail brands – from cross-category collaboration, to increased environmental sustainability efforts. Technology will also increasingly play a role in nail ...

March 2022

Children and Health - US

"The children's health category continues to have a wide reach, with approximately 74% of parents relying on OTC remedies and VMS products to maintain their children's health. Market sales remain strong, at $3 billion, despite lingering pandemic uncertainty and rising inflation. Mintel predicts that the children's health market will grow ...

Beauty and Personal Care Retailing - Spain

"After the blow caused by the onset of the COVID-19 pandemic, the Spanish beauty and personal care sector is now showing signs of recovery and sales are edging closer to pre-pandemic level. However, with the virus still in circulation, retailers need to rethink classic features of the in-store beauty shopping ...

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Beauty and Personal Care Retailing - Italy

“Still primarily store-based, the beauty and personal care retailing sector was significantly affected by the COVID-19 pandemic in 2020 but managed to claw back most of the losses in spending in 2021. The growing cost of living crisis will place a greater focus on price and value during the next ...

Beauty and Personal Care Retailing - Europe

“COVID-19 saw beauty and personal care specialist retailers benefit from rising soap, bath & shower value sales due to a strong boost from increased hand washing behaviours and a focus on essential-only purchasing amongst consumers while discretionary beauty purchases were more subdued. The ongoing global pandemic turbo-charged ecommerce over 2020 ...

Women's Haircare - UK

“Women’s haircare showed strong value growth in 2021, boosted by the styling segment which benefited from the return of social occasions. Hair health priorities will continue to drive a preference for treatment products, while scalp health remains an area of interest. Women show a willingness to trade up in this ...

Beauty and Personal Care Retailing - France

“The more discretionary end of beauty and personal care spending will see a stronger impact from the increases in the cost of living, but retailers need to go beyond the blunt instrument of price in their reaction to this. Consumer attitudes and behaviours are changing and they are looking for ...

Beauty and Personal Care Retailing - UK

“The cost-of-living squeeze will heighten savvy shopping behaviours when buying beauty and personal care products during 2022. However, price hikes don’t necessarily mean trading down, rather that people will become laser-focussed on value across all price points. Retailers and brands can encourage purchasing by promoting experiences that are good for ...

February 2022

Drug Stores - US

“Drug stores sit in a mostly comfortable position currently as the channel has seen increased sales from COVID-19 vaccinations, boosters and prescription fulfillment. While the channel holds a small lead in terms of where people shop for healthcare needs, retailers face heavy competition from the likes of mass merchandisers and ...

Shaving and Hair Removal - UK

“COVID-19, coupled with an increasingly casual culture, have deprioritised hair removal. Boredom with the current product offering, alongside consumer expectations of discounting, continue to erode market value for the UK’s shaving and hair removal products. However, growth among newer, fresher brands points to consumer interest in products that offer more ...

Soap, Bath and Shower Products - US

“After experiencing skyrocketing growth in 2020 due to stockpiling behaviors, SBS sales are expected to decline in 2021, which is a reflection of the market rebalancing itself. However, market sales are not expected to return to pre-pandemic levels, thanks to a renewed focus on hygiene and wellness. Consumers’ intention to ...

Brand Overview: BPC - UK

“Although consumer concerns around COVID-19 have declined, the ongoing disruption in terms of working habits and travelling occasions means there is a risk of BPC purchase rationalisation. This will benefit mass-market brands with a reputation for accessibility, while the increase in cost of living triggered by rising inflation will put ...

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Diversity and Inclusivity in Beauty - US

"While the beauty industry has made strides in recent years to be more inclusive, there is still work to be done. Consumers continue to feel that there are unrealistic standards of beauty, and some groups feel entirely ignored by brands. As a result, consumers are increasing expecting brands to change ...

Suncare and Skin Protection - US

"After taking a short-term hit in 2020 due to social distancing measures and travel restrictions, sunscreen and skin protection sales are heating back up, thanks to the widespread distribution of vaccines and consumers' elevated focus on skin health. However, encouraging consumers to use sunscreen during colder months and indoors is ...

January 2022

Hair Colourants - UK

"While hair colourants saw a significant boost in value in 2020, the full reopening of salons saw many switch back to old colouring habits, leaving the category in significant decline in 2021, and forecast to reach pre-pandemic levels by 2022. In order to offset a return to normal habits, consumers ...

The Private Label Beauty Consumer - UK

"Brexit and the pandemic brought with them uncertainty that saw shoppers adopting a savvier mindset, a trend that existed beforehand and will outrun both. Branded beauty dupes appeal to the consummate bargain hunter, however retailers can do more to drive digital discovery particularly as younger shoppers use social media to ...

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