

## Cannabeauty: Cannabis in BPC: Incl Impact of COVID-19 - US - May 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

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



"Consumers are stressed, overwhelmed and anxious about their physical and financial health, and many are also bored at home. Dramatic shifts in shopping behavior complicate things further, and consumers are inexperienced with these products."  
– Michele Scott, Senior Analyst

This report looks at the following areas:

- The impact of COVID-19 on self-care practices like stress-relieving efforts and the role CBD beauty products play
- How a recession will trigger new spending considerations as they relate to premium discretionary purchases like enhanced beauty products
- Consumer understanding of CBD and hemp products
- BPC categories to watch for cannabeauty

Cannabeauty is a fresh and unique market that includes a diverse range of products in the beauty and personal care categories that feature trending cannabis-based ingredients like CBD and hemp. While CBD is finding its way into more of these products, hemp seed oil is by no means new to BPC. The new realities brought on by COVID-19 and the ensuing economic uncertainties will challenge brands looking to or actively participating in this market. A significant hurdle: half of consumers don't have a clear understanding of the difference between hemp and CBD. Knowledge and trial of these products is still nascent and inspiring trial may be difficult in both a tough economy and also a new shopping universe.

Getting into consumer hands at a time when trial is limited will be a challenge; yet, the mystique and functionality of these products containing hemp and CBD may help consumers to feel a sense of normalcy, trying new products and seeking new ways to exercise self-care. Delivering on efficacy will be even more critical than ever as consumers tighten the budget heading into uncertain times. Brands that can provide a solution to consumers will thrive, but those that don't will risk the reputation of hemp and CBD brands and the cannabis industry broadly.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](https://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

# Cannabeauty: Cannabis in BPC: Incl Impact of COVID-19 - US - May 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

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  
Key issues covered in this report  
Definitions

### Executive Summary

Market overview  
Top takeaways  
Issues  
Brands will have some explaining to do  
Figure 1: Consumer awareness of differences between hemp and CBD, February 2020  
Interest in CBD is low  
Figure 2: Consumer Interest in CBD, February 2020  
Cannabeauty has more to prove  
Figure 3: TURF Analysis – Attributes, February 2020  
Opportunities  
Hemp is a natural addition  
Figure 4: Important product attributes, February 2020  
Interest outpaces use

### The Impact of COVID-19 on Cannabeauty

What you need to know  
Figure 5: Short, medium and longer term impact of COVID-19 on Cannabeauty June 2020  
Opportunities and Threats  
Stalled product education may stall trial  
Invite consumers to wash the stress away  
Shifting channel changes will accelerate  
Figure 6: Beauty retailers shopped, 2019  
Beauty is on the back burner, for now  
Figure 7: Changes in priority to consumer spending due to COVID-19, fielded May28-June 4, 2020  
A challenging supply chain is complicated further  
Impact of COVID-19 on the cannabis and BPC markets  
Beauty and personal care were pacing slow and steady  
Figure 8: Total US sales Beauty and personal Care products, 2014-19  
Cannabis, and cannabis ingredients, gain credibility in the eyes of the "law"  
Cannabis + beauty communities give back  
How the COVID-19 crisis will affect cannabeauty's key consumer segments  
Women seeking wellness will also want information  
How a COVID-19 recession will reshape the industry

BUY THIS  
REPORT NOW

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

# Cannabeauty: Cannabis in BPC: Incl Impact of COVID-19 - US - May 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Unemployment will trigger cannabeauty trade outs, but unequally

COVID-19 emphasizes need for personal care

Figure 9: Consumer spending on beauty and personal care products, annual, 2000-19 and Q1 2020

COVID-19: US context

## The Market – What You Need to Know

Cannabeauty is face-forward

Price points vary widely

Cannabeauty can be for any brand

Hemp products take liberties with labeling

## Market Breakdown

Overall market breakdown differs from cannabis penetration

Figure 10: Share of sales in beauty and personal care market, by category, 2018 (est)

Skincare leads CBD product launches

Figure 11: Product launches with CBD as an ingredient, by category, May 2018-April 2020

Hemp has broader application

Figure 12: Product launches with hemp as an ingredient, by category, May 2018-April 2020

## Market Perspective

Function is everywhere

Figure 13: Functional benefit usage and interest, October 2019

## Market Factors

US unemployment reaches record highs

Figure 14: Monthly Unemployment Rate, May 2020

Consumer confusion complicates the market

Figure 15: Consumer awareness of differences between hemp and CBD, February 2020

The incredible, edible hemp: a safer ingredient?

Relaxation offers dual opportunity

## Key Players

Prestige brands offer a luxe take on hemp oil, CBD

Figure 16: luxury hemp and CBD products

Hemp seed oil has mass appeal

Figure 17: Mainstream brand hemp and CBD products

To smell or not to smell

Figure 18: Perfume and deodorant with CBD or hemp

OG brands mix it up

Figure 19: longstanding brands featuring hemp

Hemp finds versatile application in hair care

Figure 20: Hemp haircare

Cannabeauty: What's in a name?

BUY THIS  
REPORT NOW

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

# Cannabeauty: Cannabis in BPC: Incl Impact of COVID-19 - US - May 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 21: cannabis-focused brands

A colorful take on the hemp trend

Figure 22: color cosmetics featuring hemp or CBD

## The Consumer – What You Need to Know

Consumers are a basic bunch

Younger consumers' interest is piqued

Cannabeauty must be a jack of all trades

Consumers are confused

## Product Usage

Basic products are consumer staples

Figure 23: Home use of personal care and beauty products, February 2020

Women are putting their best face forward, young men closing the gender gap

Figure 24: Home use of personal care and beauty products, by age and gender, February 2020

## Experience and Interest in Hemp

Consumers hope hemp offers special benefits

Figure 25: Interest in and use of products with hemp, February 2020

Hemp as a little luxury

Figure 26: Experience and interest in personal care products with hemp, February 2020

## Experience and Interest in CBD

CBD benefits play well with bath time

Figure 27: Experience and interest in personal care products with CBD, February 2020

Bath products interest associated to youth

Figure 28: Experience and interest in bath products with CBD, by age, February 2020

Affluent consumers least interested in cannabeauty

Figure 29: Experience and interest in personal care products with CBD, by income, February 2020

## Appealing Attributes

A tale of two attribute categories

Figure 30: Appealing attributes in personal care and beauty products with cannabis ingredients, February 2020

Men look for practical benefits; women seek aesthetic benefits

Figure 31: Select attributes in personal care and beauty products with cannabis ingredients, by gender, February 2020

Young women want clean, ethical products

Figure 32: Select attributes in personal care and beauty products with cannabis ingredients, by age/gender, February 2020

Knowledge about CBD and hemp translates into organic interest

Figure 33: Appealing attributes in personal care and beauty products with cannabis ingredients, by knowledge of CBD and hemp, February 2020

## Attitudes and Behaviors

Knowledge is power

Figure 34: Attitudes and behaviors about cannabeauty products, February 2020

**BUY THIS  
REPORT NOW**

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

# Cannabeauty: Cannabis in BPC: Incl Impact of COVID-19 - US - May 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

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

## Women want education

Figure 35: Understand benefits and want to learn more about benefits of hemp/cbd products, by gender and age, February 2020

## Building consumer knowledge builds brands

Figure 36: Attitudes and behaviors about cannabeauty products, by awareness of difference between CBD and Hemp, February 2020

## Age drives lack of understanding and interest in education

Figure 37: Attitudes and behaviors about cannabeauty products, by household income and age, February 2020

## With education comes confidence

Figure 38: Cannabeauty attitudes – CHAID – Tree output, February 2020

## Discovery of beauty and personal care products

### Consumers split among options

Figure 39: Methods of discovery of beauty and personal care products with hemp or CBD as an ingredient, February 2020

### Access to knowledgeable professionals matters

Figure 40: Use of professionals for discovery, by income, February 2020

### Young consumers want to put a face to a claim

Figure 41: Select methods of discovery of beauty and personal care products with hemp or CBD as an ingredient, by age, February 2020

## Appendix – Data Sources and Abbreviations

### Data sources

### Consumer survey data

### Methodology

### Abbreviations and terms

### Abbreviations

**BUY THIS  
REPORT NOW**

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