

Color Cosmetics: Incl Impact of COVID-19 - US - July 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.

This report looks at the following areas:

- The impact of COVID-19 on consumer behavior and the color cosmetics market
- A COVID-19-induced recession will see consumers trade down
- Use of protective face masks creates opportunities for transfer-proof claims
- Incorporate wellness with "FUN-ctional" cosmetics



"COVID-19 has dramatically impacted the color cosmetic landscape. During the lockdown phase of the pandemic, the need/desire to wear makeup was mitigated as consumers limited their interactions outside of the home."

- Clare Hennigan, Senior Beauty Analyst

Buy this report now

Visit store.mintel.com

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

Table of Contents

OVERVIEW

- What you need to know
- Key issues covered in this Report
- Definition

EXECUTIVE SUMMARY

- Top takeaways
- Market overview
- Figure 1: Total US retail sales and forecast of color cosmetics, at current prices, 2015–25
- Impact of COVID-19 on color cosmetics
- Opportunities and challenges
- Clean beauty accelerates, demanding a new level of transparency
- Develop products reflective of lifestyle shifts
- Life online challenges market

Figure 3: Select behaviors toward color cosmetics, by adults aged 18–24, May 2020

- Emphasize convenience claims to reach key demographics
- Self-esteem and joy are the cornerstones of cosmetics
- Figure 4: Benefits sought, May 2020
- Embrace virtual communication to connect with consumers
- Figure 5: Changes in behavior – More, by age, May 2020
- What's next

THE MARKET – WHAT YOU NEED TO KNOW

- Color cosmetics will take a hit
- Expect steep declines across segments in 2020
- Embrace the shifting perception of beauty
- Retailers and brands take a stance on social awareness

MARKET SIZE AND FORECAST

- Color cosmetics will take a hit
- Cosmetic market will see a “mask effect”

Figure 6: Total US retail sales and forecast of color cosmetics, at current prices, 2015–25

MARKET BREAKDOWN

- Expect steep declines across segments in 2020
- Figure 7: Percent change of total US retail sales of color cosmetics, by segment, 2016–20 (est)
- Facial cosmetics continue to dominate...for now

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Figure 8: Share of total US retail sales of color cosmetics, by segment, at current prices, 2020

MARKET PERSPECTIVE

- **Embrace the shifting perception of beauty**
Figure 9: Instagram Post – @sibyllete
Figure 10: Instagram Post – @Guccibeauty
- **Social media drives cosmetic trends**
- **Retailers and brands bet big with clean**

MARKET FACTORS

- **Retailers and brands take a stance on social awareness**
- **Demographic shifts will change landscape**
Figure 11: Repertoire analysis of product usage, by adults aged 18-24, race and Hispanic origin, May 2020
- **Small/indie brands face supply chain challenges**

KEY PLAYERS – WHAT YOU NEED TO KNOW

- **Key players see declines due to COVID-19**
- **Cosmetics join the wellness revolution**
- **Life online challenges market**
- **Tap into the gamer community to engage consumers virtually**

COMPANY AND BRAND SALES OF COLOR COSMETICS

- **Key players see declines due to COVID-19**
Figure 12: Multi-outlet sales of color cosmetics, by leading companies, rolling 52 weeks 2019 and 2020

WHAT'S WORKING

- **Products that mimic professional services see a boost**
Figure 13: MULO sales of select of NYX lip gloss and KISS false eyelashes, current 52-week period ending April 19, 2020
- **Photo finishes, FTW**
Figure 14: Multi-outlet sales of Revlon and Wet n Wild foundation, by companies and brands, rolling 52 weeks 2019 and 2020
- **Cosmetics tap into the wellness revolution**

WHAT'S STRUGGLING

- **All categories take a hit due to COVID-19**
- **Life online challenges market**
Figure 15: Select behaviors toward color cosmetics, by adults aged 18-24, May 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

- **2-in-1 products challenge multistep routines**

Figure 16: MULO sale of Burt's Bees Lip & Cheek Stain, 52-week period ending April 19, 2020

WHAT TO WATCH

- **Tap into the gamer community to engage consumers virtually**

Figure 17: Instagram post – MAC x Sims 4

Figure 18: YouTube – Augmented touch

- **COVID-19 increases demand for new packaging formats**
- **COVID-19 ushers in a new era of clean beauty and sustainability**

Figure 19: Select attitudes toward color cosmetics, by adults aged 18–24, May 2020

- **Eclectic minimalism will drive beauty trends**

Figure 20: Instagram Post – @hypebaeauty

Figure 21: Instagram Post – @whowhatwear

THE CONSUMER – WHAT YOU NEED TO KNOW

- **Product usage by age “highlights” preferences**
- **Most eye makeup products see usage declines**
- **Glossy looks have made a comeback**
- **Self-esteem and joy are the cornerstones of cosmetics**
- **Premium brands will be impacted by recession**
- **COVID-19 will challenge market due to physical try-on hurdles**
- **COVID-19 impacts category spend, but key groups remain engaged**

FACIAL MAKEUP USAGE

- **Majority of women stick to basics**

Figure 22: Facial makeup usage, May 2020

- **Steady declines in usage point to changes in trends**

Figure 23: Facial makeup usage, April 2018, July 2019 and May 2020

- **Product usage by age “highlights” preferences**

Figure 24: Instagram post – @Namvo

Figure 25: Select facial makeup usage, by age, May 2020

- **Black women are increasing facial cosmetic usage**

Figure 26: Facial makeup usage, by race and Hispanic origin, May 2020

EYE MAKEUP USAGE

- **Mascara remains the most used cosmetic product**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Figure 27: Eye makeup usage, May 2020

- **Most formats see declines**

Figure 28: Multi-outlet sales of Maybelline Snapscara, rolling 52 weeks 2019 and 2020

Figure 29: Eye makeup usage, April 2018, July 2019 and May 2020

- **Eye cosmetics change shape**

Figure 30: Eye makeup usage, by age, May 2020

- **Hispanic women demonstrate high engagement**

Figure 31: Eye makeup usage, by race and Hispanic origin, May 2020

LIP MAKEUP USAGE

- **Traditional formats drive usage**

Figure 32: Lip makeup usage, May 2020

- **Lip product usage is down, reflective of category overall**

Figure 33: Lip product usage, April 2018, July 2019 and May 2020

- **Glossy looks have made a comeback**

Figure 34: Multi-outlet sales of NYX lip gloss, by companies and brands, rolling 52 weeks 2019 and 2020

Figure 35: Lip product usage, by age, May 2020

- **Black and Hispanic adults drive usage of lip products**

Figure 36: Lip product usage, by race and Hispanic origin, May 2020

BENEFITS SOUGHT

- **Majority of consumers want a natural appearance**

- **Self-esteem and joy are the cornerstones of cosmetics**

Figure 37: Benefits sought, May 2020

- **More than makeup: 18-24 year olds use products to express their personality, find joy**

Figure 39: TikTok – @Benefitcosmetics

Figure 40: Benefits sought, by age, May 2020

- **Hispanic women motivated by enjoyment, Black women are motivated by community**

Figure 41: Benefits sought, by race and Hispanic origin, May 2020

BEHAVIORS TOWARD COLOR COSMETICS

- **Germs and sanitation are concerns for many women**

Figure 42: Behaviors toward color cosmetics, May 2020

- **Young adults actively engaged...even at home**

Figure 43: Instagram Post – @Rodanandfields

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Figure 44: Behaviors toward color cosmetics – I do this, by age, May 2020

- **Focus on convenience claims to reach key demographics**

Figure 45: Behaviors toward color cosmetics – I do this, by race and Hispanic origin, May 2020

ATTITUDES TOWARD COLOR COSMETICS

- **Premium brands may be impacted by recession**

Figure 46: Instagram post – @Covergirl

Figure 47: Attitudes toward color cosmetics, May 2020

- **Under 44 year olds concerned about brand values**

Figure 48: Attitudes toward color cosmetics, by age, May 2020

PURCHASE DRIVERS

- **COVID-19 will challenge market due to physical try-on hurdles**

Figure 49: Purchase influencers, May 2020

- **Reach 18-34 year olds with expanded digital services**

Figure 50: Purchase influencers, by age, May 2020

CHANGES IN BEHAVIOR

- **COVID-19 impacts category spend, but key groups remain engaged**

Figure 51: Changes in behavior, May 2020

- **Young adults stream beauty content during COVID-19**

Figure 52: Key drivers of watching makeup tutorials due to COVID-19, May 2020

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Sales data
- Forecast
- Consumer survey data
- Abbreviations and terms
- Abbreviations
- Terms

APPENDIX – THE MARKET

Figure 53: Total US retail sales and forecast of color cosmetics, at inflation-adjusted prices, 2015-25

Figure 54: Total US retail sales of color cosmetics, by segment, at current prices, 2015-20

Figure 55: Total US retail sales of color cosmetics, by segment, at current prices, 2018 and 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Color Cosmetics: Incl Impact of COVID-19 - US - July 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 56: Total US retail sales of eye cosmetics, at current prices, 2015-20

Figure 57: Total US retail sales of facial cosmetics, at current prices, 2015-20

Figure 58: Total US retail sales of lip cosmetics, at current prices, 2015-20

APPENDIX – RETAIL CHANNELS

Figure 59: Total US retail sales of color cosmetics, by channel, at current prices, 2015-20

Figure 60: Total US retail sales of color cosmetics, by channel, at current prices, 2018 and 2020

APPENDIX – KEY PLAYERS

Figure 61: Multi-outlet sales of eye cosmetics, by leading companies and brands, rolling 52 weeks 2019 and 2020

Figure 62: Multi-outlet sales of facial cosmetics, by leading companies and brands, rolling 52 weeks 2019 and 2020

Figure 63: Multi-outlet sales of lip cosmetics, by leading companies and brands, rolling 52 weeks 2019 and 2020

APPENDIX – THE CONSUMER

Figure 64: Purchase influencers, TURF analysis, May 2020

Figure 65: Purchase influencers, TURF analysis – Table, May 2020

- **Key driver analysis**
- **Interpretation of results**

Figure 66: Key drivers of impact of COVID-19 – Key driver output, May 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.