

Sustainability in Beauty & Personal Care - UK - 2022

Report Price: £2195 | \$2995 | €2600

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:

- Sustainable launch activity and innovation in BPC.
- Sustainable behaviours adopted by consumers.
- Purchase of eco-friendly BPC products.
- Usage of and interest in using BPC refill concepts, as well as barriers to entry.
- Attitudes towards sustainability in BPC.

Although 71% of adults think that everyone has a personal responsibility to protect the environment, in BPC, there remains an expectation for big brands to effect change. Consumers only establish sustainable behaviours that are cost-effective or convenient, and although an increasing proportion of BPC product launches carry eco or ethical claims, the purchase of these products has not increased significantly in recent years.

The rising cost of living presents both challenges and opportunities for green BPC. Expense has been a barrier to entry in green BPC in the past, meaning heightened price sensitivities could erode demand. However, brands and manufacturers faced with rising energy and raw materials costs may ramp up eco innovation to offset such pressures.

A lack of regulation represents the biggest threat to green BPC. Brands and manufacturers are able to exploit the blurred understanding of sustainable, but this leads to perceptions of greenwashing, inconsistency between brands and consumer confusion. However, a shift towards collaboration is a positive step for both the industry and consumers alike.

The biggest opportunity in the market lies in the evolution of packaging, with an opportunity to enhance traditional concepts such as recycling and refill schemes for the next generation of users. Convenience-led claims such as Recycle Ready will help to eliminate the say-do gap for consumers who worry about sustainability but struggle to change their behaviours, while creating



“Although consumer awareness of environmental issues is a cause of anxiety, the proportion buying eco-friendly BPC products has not changed significantly in recent years.”

– **Samantha Dover, Category Director – BPC**

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

Report Price: £2195 | \$2995 | €2600

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

aspirational primary packaging that is worthy of being refilled will play a significant role in driving interest in refills.

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

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

Table of Contents

OVERVIEW

- Key issues covered in this Report
- Market context
- Products covered in this Report

EXECUTIVE SUMMARY

Figure 1: Outlook for sustainability in beauty and personal care, 2022-26

- **The market**
- **Eco innovation has created a new baseline in everyday products**

Figure 2: New product launches with ethical and environmental claims* in the UK BPC category, 2017-21

- **Rising innovation in refills driven by plastic price and prohibition**

Figure 3: New product launches in the ethical/environmental* BPC category with refill/refillable claims, 2017-21

- **Companies and brands**
- **Consumers are forced to determine their own eco priorities**

Figure 4: New product launches with ethical and environmental claims* in the UK BPC category, by top 10 ultimate companies, 2021

- **The consumer**
- **Consumers reuse and recycle, but fewer are prepared to reduce**

Figure 5: Frequency of practising sustainable habits, 2021

- **Consumers look to brands to clean up the impact of beauty products**

Figure 6: Net of purchase of eco-friendly and regular beauty and personal care products, 2021

- **Innovation influences green BPC purchase habits**

Figure 7: Purchase of eco-friendly beauty and personal care products, 2021

- **Rising cost of living drives consumers to seek reward**

Figure 8: Usage of and interest in BPC refill concepts, 2021

- **Lack of availability key obstacle to use of refill concepts**

Figure 9: Reasons for not using/being interested in BPC refill concepts, 2021

- **Lack of regulation erodes consumer perceptions of green BPC**

Figure 10: Attitudes towards sustainability in BPC, 2021

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

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

ISSUES AND INSIGHTS

- **Rising cost of living can trigger sustainable behaviours**
- **Increased cost of plastic refocuses attention on refills**
- **Sincere labelling can address consumer confusion**

MARKET DRIVERS

- **Post-Brexit regulation and legislations**
- **Record price of plastic drives sustainable innovation**
- **Commitments to reduce plastic waste continue**
- **Reforms aim to reduce landfill**
- **Recycle Ready packaging to simplify post-use impact**
- **Labelling loopholes see brands cash in on halo effect**
Figure 11: Awareness of BPC ethical certifications, 2021
- **Post-life impact gains importance**
- **Palm oil raises issues of eco and social sustainability**
- **Lack of regulation feeds perception of greenwashing**
- **An ageing population calls for relevant green BPC innovation**
Figure 12: UK population estimates and projections, 2015-25
- **The conflict in Ukraine will hurt the UK economy**
- **Inflation is the key concern for 2022 for consumers, brands and the economy**
- **Consumers' financial wellbeing has slipped from its recent high point...**
Figure 13: Household financial wellbeing index, 2016-22
- **...and concerns over inflation are coming to the fore**
Figure 14: Consumer concerns about household finances, 2021-22

LAUNCH ACTIVITY AND INNOVATION

- **Taking advantage of shades of green to increase eco NPD**
Figure 15: New product launches with ethical and environmental claims* in the UK beauty and personal care category, 2017-21
- **QR codes offer shortcut to consumer clarity**
- **Eco launches become baseline in everyday products**
Figure 16: New product launches with ethical/environmental claims*, by sub-category, 2017-21
- **Sustainability claims reach saturation point in some sectors**
- **Eco beauty gets a makeover inside and out**
Figure 17: Fastest-growing claims in ethical and environmental* BPC, 2020-21
- **Guilt-free beauty zooms in on environmental fate**
- **Biodegradability still the preserve of prestige products**

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

Report Price: £2195 | \$2995 | €2600

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

Figure 18: Baylis & Harding natural hand wash, 2021

- **Opportunities exist for companies to take the lead in certain claims**

Figure 19: New product launches with ethical and environmental claims* in the UK beauty and personal care category, top 10 companies and others, 2021

- **Free-from focus adds to confusion**

Figure 20: Skin & Tonic Get Up & Glow Jelly Cleanser, 2021

- **Innovation in refills helps increase accessibility**

Figure 21: NPD in ethical/environmental* BPC products with refill/refillable claims, 2017-21

- **Drive desire to refill with thoughtful packaging design**

SUSTAINABLE BEHAVIOURS

- **Consumers reuse and recycle, but don't reduce**

Figure 22: Frequency of practising sustainable behaviours, 2021

- **Lifestyles and living arrangements impact behaviours**

Figure 23: Net participation in sustainable behaviours*, by age, 2021

PURCHASE OF ECO-FRIENDLY BEAUTY AND PERSONAL CARE

- **Manufacturers, not consumers drive uptick in eco beauty**

Figure 24: Net of purchase of eco-friendly beauty and personal care products, 2021

- **Consumers buying a limited repertoire of eco beauty products**

Figure 25: Purchase repertoire of eco-friendly and regular beauty and personal care products, 2021

- **Younger shoppers more likely to buy green beauty**

Figure 26: Net purchase of eco-friendly beauty and personal care products, by age, 2021

- **Green BPC purchase is linked to NPD**

Figure 27: Purchase of eco-friendly beauty and personal care products, 2021

USAGE OF AND INTEREST IN BPC REFILL CONCEPTS

- **Packaging design can enhance refill appeal**

Figure 28: Net usage of and interest in select BPC refill concepts, 2021

- **Boost consumer participation through incentives**

- **Convenience still a primary barrier**

Figure 29: Usage of and interest in select BPC refill concepts, 2021

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

Report Price: £2195 | \$2995 | €2600

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

- **Women want to be rewarded for their efforts**
- **Reimagine refill services with online shoppers in mind**
- **Tout value propositions to boost in-store refills**

Figure 30: Interest in in-store refill stations where I can refill empty product, by financial confidence, 2021

BPC REFILL BARRIERS TO ENTRY

- **Lifestyle positioning to enhance appeal of refills**
Figure 31: Reasons for not using/being interested in BPC refill concepts, 2021
- **Make refills financially rewarding to boost brand profits**

ATTITUDES TOWARDS SUSTAINABILITY

- **Drive change with convenient eco solutions**
Figure 32: Attitudes towards sustainability, 2021
- **Help parents address eco anxieties**
- **Standardisation can address green gimmicks and consumer confusion**
Figure 33: Attitudes towards sustainability in BPC, 2021
- **Shoppers place onus on big brands to make an impact**

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

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)**.