

## Beauty and Personal Care - International

### December 2019

#### Suncare - UK

"The UK suncare market is going through a challenging period. Not only is the market highly vulnerable to the UK weather, but sales are also influenced by outbound travel as there is still a perception that suncare is only needed on holiday. However, consumers are slowly taking suncare more seriously ...

#### Fragrance Trends in Beauty - US

"Legacy fragrance houses are struggling due to the rise of indie perfumeries and cross-category competition, and traditional fragrance offerings no longer meet the needs of key demographics. On top of that, US consumers are continuing to spend less money year over year on fragrances. The fragrance industry needs to evolve ...

### November 2019

#### Beauty Online - UK

"The online beauty market has benefitted from a desire amongst consumers to experiment with new brands and products. However, competition is intense and the prolific discounting is expected to subdue market growth in future as consumers now expect to buy beauty and grooming products at a discounted rate when shopping ...

#### Diversity in Beauty - UK

"The beauty industry has taken strides in projecting a more diverse image in recent years; the 'Fenty effect' continues to reverberate through colour cosmetics and beauty brands have increasingly distanced themselves from stereotyping in advertising campaigns and when marketing products across beauty categories. However for a beauty brand to truly ...

### October 2019

#### Spa, Salon and In-Store Treatments - UK

#### Clean Beauty - US

"The natural movement continues to shape the BPC industry due to perceptions of safety. However, a surge of retailers and brands are adopting clean beauty standards, leading to a shift from natural to clean. Additionally, consumers are becoming more aware of the impact their demand for natural ingredients has on ...

#### Prestige Beauty - UK

"The prestige sector saw a 1% growth in value in 2018 as premium brands continue to have a high quality image among consumers. Indeed, usage of premium brands has shown a rise across all sectors, with fragrances remaining the most popular category. Bricks and mortar stores remain essential for both ...

#### Beauty and Personal Care Accessories - US

"High penetration of category staples combined with long purchase cycles creates challenges in growing the market. To compete in this space, brands must offer additional benefits or claims to stand out to consumers. Social media and influencer collaborations present opportunities for players in this space. By tapping into macro-consumer trends ...

#### Supplements - US

"The supplements segment leads the way for continued growth of the vitamins, minerals and supplements market, surpassing vitamins in overall market sales in recent years. Supplements can play in the wellness space more so than vitamins and minerals on their own, with seemingly limitless opportunities for combining functional ingredients offering ...

#### Beauty Retailing - US

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“Growth in the spa, salon and in-store treatments market has remained strong as driven by the rise in the usage of some treatments. The outlook, however, is more challenging as ongoing political and economic uncertainty could impact consumer spend. Competition in the treatments market is also rising, which will make ...

"Interest in beauty and personal care hasn't faltered, but what consumers are buying is evolving as are where and how they do so. In-store shopping is still the most preferred method for most types of purchases, but the digital experience is increasingly important, especially for pre-purchase research. Consumers also have ...

### Beauty Devices - US

"Beauty devices find acceptance among most women, with broad use of hair appliances and strong interest in skincare devices. Hair appliances continue to struggle in the face of long replenishment cycles and preference for more natural-looking, healthy hair. Skincare devices continue to grow as technology fuels innovation and creates opportunity ...

### Ingredient Trends in Beauty - US

"The beauty market is highly diverse, and brands often rely on ingredients to stand out. Although women, particularly younger women, expect brands to use natural ingredients, they ultimately choose a product based on efficacy. One of the challenges for category players will be how to navigate the minefield of taboo ...

### Men's Attitudes towards Haircare and Skincare - UK

“Although men are engaged in their beauty and grooming routines and show high purchase of hair and skincare products, brands and retailers are still not capitalising on male interest in these categories. Despite high interest in male brands, mass-market retailers continue to have limited availability of male-specific lines. Men turn ...

## September 2019

### In-salon Hair Services - UK

“The in-salon hair services category is expected to show a 3% rise in market value in 2019 as added value and out-of-hours services encourage bookings. Whilst consumer confidence is up, an uncertain UK economy driven by Brexit could see people cutting back on ‘treats’ such as salon services. Expense is ...

### Managing Skin Conditions and Allergies - UK

“Own-label, one-a-day allergy relief tablets look to have been a victim of their own success – driving down spend and purchase frequency. Indications are that allergies are rising, but the forecast for allergy relief remains bleak unless interest can be invigorated with alternative formats or enhanced product positioning. When it ...

### Marketing to Moms - US

"Moms are responsible for most household and childcare duties, meaning that they are the key decision makers when it comes to what their families eat, wear, and watch. However, this also means moms are being pulled in a million different directions and may not have the time or the inclination ...

### Vitamins and Minerals - US

"The vitamins and minerals market remains steady, with the majority of adults currently taking at least one vitamin or mineral. While younger consumers are driving demand for innovation and personalization, traditional formats and formulations continue to be important to overall market strength. However, a demand for natural, specifically whole food ...

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### Luxury Beauty Consumer - US

"Luxury beauty brands find acceptance among most women, with broad use across demographic lines. While luxury often roots itself in iconic brand identities, the luxury beauty consumer continues to evolve. This necessitates that makers and marketers align with more modern perceptions of luxury, such as clean ingredients, ethical sourcing and ...

### Men's Personal Care - US

"The men's personal care market, currently valued at more than \$4.4 billion in annual sales, has been growing steadily since 2014. This growth is largely driven by men's interest in personal hygiene essentials such as shampoos and deodorants. As traditional gender norms continue to shift, promoting themes of beauty ...

## August 2019

### Approach to Health Management - US

"Consumer spending on health-related services and products increased significantly from 2013-18, and a slowdown is nowhere in sight. Health management is universal, with many people placing significant pressure on medical professionals to guide their health and wellbeing through product recommendations and ailment and wellbeing care. With the foreseen doctor shortage ...

### Fragrances - UK

"The market is estimated to decline by 0.8% to £1.48 billion in 2019 before a longer-term period of growth as consumers trade up to more sophisticated formats. Brands may need to consider ethical values, ingredient transparency or more unique benefits to differentiate from competitors and command a price ...

### Black Haircare - US

"The Black haircare market has evolved into regimen maintenance and styling, with chemical product use concentrated among the few who will always be customers. Having chemical-free hair is no longer the big story, but rather how Black consumers' beliefs and perceptions of their hair impacts their personal maintenance, style choices ...

### The Generation Z BPC Consumer - UK

"Generation Z are defining their own parameters of beauty and are not looking for external validations for their appearance. Self-expression is essential to this group, who are already involved in their BPC routines at a young age and buying their own products. Whilst much is speculated about the influence of ...

## July 2019

### Color Cosmetics - US

"The color cosmetics market is highly dependent on new product development, as inspired by trends in fashion and beauty. In 2019, total US retail sales for the color cosmetics market is expected to exceed \$11.1 billion. Most recently, as innovations in lower-priced offerings have gained traction, a slowdown in ...

### Oral Care - UK

"Oral care routines rarely change for consumers, creating a challenge for brands that they need to overcome. However, consumer interest in their own health and wellbeing, and their understanding of how oral hygiene impacts on them emotionally means there is an opportunity for brands to insert themselves into regular consumer ...

### Bodycare and Deodorant - US

"The bodycare and deodorant market continues to experience slow, yet steady sales growth, reaching \$6.5

### Women's Facial Skincare - UK

"The market's previous trajectory for growth has been short-lived, and the market is expected to decline to an

## Beauty and Personal Care - International

billion in total 2019 retail sales, an increase of 3.4% from 2018. Incorporating added benefits or unique formats typically found in facial skincare into bodycare can help brands boost engagement and sales. Deodorant ...

estimated £1.16 billion in 2019. The move away from K-Beauty-inspired routines has been driven by women's evolving interest in radiance and glow. Serums and oils are the formats chosen to create ...

### June 2019

#### The Millennial Beauty Consumer - US

"Millennial women show various levels of engagement, spending a consistent amount of time on their beauty routines and shopping for products. Older Millennials over index for interest in clean beauty products, while Younger Millennials follow a similar pattern compared to Gen Zs. It is important for brands to consider the ...

#### Hair Colourants - UK

"The growth of temporary colour has not outweighed the decline of permanent colourants, and in 2018 the market dropped by 2%. The trend towards ageing naturally means permanent colourants must seek a new heartland, while younger consumers' expectations for exciting and changeable looks give brands the opportunity to become the ...

#### Oral Health - US

"For many consumers, oral care is perceived as a daily health essential, offering a consistent usage occasion for key players to penetrate. More than half of consumers report using four to six oral care products during their routine, supporting the need for supplemental products to achieve and maintain oral hygiene ...

### May 2019

#### Colour Cosmetics - UK

"Value growth of colour cosmetics slowed down in 2018 as women showed evidence of reducing spend by purchasing products less frequently. Whilst the category remains an experimental one, lower-priced mass-market and budget brands are being used to experiment particularly in colour makeup, keeping the overall value down. With high interest ...

#### OTC Analgesics and Cough, Cold and Flu Remedies - UK

"There remains significant potential yet to be realised within the topical analgesic segment, particularly if brands can focus on differentiating their products more clearly from oral pain relief products. In addition, given the consumer trend towards looking at health more holistically, brands in the analgesic and cough, cold and flu ...

#### Marketing to Gen Z - US

"Generation Z is growing up. They are focused on the future and feel tremendous pressure to succeed. They are close to their parents and still rely on them financially, but are optimistic about their future careers. They are more into social media and video games than older generations, and marketers ...

#### Gen Z Beauty Consumer - US

"Generation Z consists of an array of young consumers at different stages in life. This diverse age range can be a challenge for brands as some Gen Zs are completely dependent on their parents, while others are branching out on their own for the first time. Regardless of age, these ...

### April 2019

#### Men's and Women's Beauty and Grooming Routines - UK

"Ease remains essential when it comes to beauty and grooming routines, highlighting the relevance of convenience-related claims. However, with enjoyment in the category being high, brands can innovate in solutions that offer more sensorial benefits to drive routines. Health and environmental concerns could impact the category going forward; consumers may ...

#### Hand, Body and Footcare - UK

"The growth of the market to £557 million in 2018 has been driven by bodycare as consumers don't understand the need for hand and foot products. Innovation trends create a focus on all-purpose products, meaning brands must develop personality to differentiate. Links to wellness could work for footcare; feeding the ...

### March 2019

#### Shampoo, Conditioner and Hairstyling Products - US

"The shampoo, conditioner, and hairstyling products market continues to experience slow, yet steady growth, benefiting from strong shampoo and conditioner sales. However, damage concerns have some consumers skipping daily washing in lieu of dry shampoo. Given that conditioner and hairstyling product usage is reliant on frequency of shampooing, less washing ...

#### Mother and Baby BPC - UK

"In 2018 the babies' and children's personal care products, nappies and wipes market fell by 3.4% to £680 million. The trend for naturals in beauty has driven parents to look for similar gentle solutions for their babies, expecting brands and retailers to deliver them with the same quality and ...

### February 2019

#### Beauty Influencers - US

#### Disposable Baby Products - US

"The disposable baby products market is estimated to reach \$8 billion in total 2019 retail sales, a decline of nearly 1% from 2018. Market struggles can partially be attributed to declining birth rates, parents' value-driven approach to the category, as well as increased competition from online retailers and subscription services ...

#### Facial Skincare and Anti-Aging - US

"Growth has slowed for the facial skincare and anti-aging market, as the category competes with both internal and external factors. Consumer demand for multibenefit products continues, and an emphasis on clean skincare could be a challenge to mature, established players. Lastly, reasons for using face masks have shifted slightly, with ...

#### Women's Haircare - UK

"Following a slight rise in value in 2016 and 2017, women's haircare is in decline again as discounting and special offers impact buying behaviours, whilst the desire for more natural styles and focus on hair condition continues to negatively impact the styling segment. A reduction in recorded advertising spend suggests ...

#### Drug Store Retailing - US

"US drug store revenues are expected to be valued at over \$293 billion this year. While the sector has consistently posted revenue gains, the pace of growth is projected to decelerate in light of continued channel-shifting and a consumer preference toward generic drugs versus name brands. Drug stores are focused ...

#### Soap, Bath and Shower Products - UK

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"The power of beauty influencer marketing continues to grow, with women flocking to social media for tutorials and product reviews. Most women follow beauty influencers to learn more about trends, and the use of influencers can shorten the learning curve while minimizing the risk often associated with buying beauty products ...

"Although the soap, bath and shower category is under some pressure, there are plenty of bright spots that point the way towards future growth. The success of Baylis & Harding in convincing consumers to upgrade to a more premium product shows that products can still benefit from creating differentiation in ...

### Soap, Bath and Shower Products - US

"The soap, bath, and shower products market continues to experience slow, yet steady growth, benefiting from strong liquid body wash sales that are compensating for struggles in the bar soap segment. Market growth can also be partially attributed to the inclusion of premium and therapeutic benefits found in liquid body ...

### The Generation X BPC Consumer - UK

"The industry's focus on anti-ageing messaging towards anyone over the age of 40 has left Generation X feeling misunderstood. Ageing is still considered a future problem for many of these consumers, while their more pressing needs for convenience and personalised options are ignored. Mass brands retain the trust of Generation ...

January 2019

### Health Management Trends - US

"The health and wellness market has grown from an industry to a culture, expanding the definition of what it means to be healthy in more holistic terms. All adults report doing something for the benefit of their health and wellbeing so brands have an opportunity to connect with consumers to ...

### Beauty and Personal Care Retailing - Germany

"It would be wrong to suggest that the beauty and personal care retailers have had it easy in recent years, though the failure of Schlegel did give them breathing space. We think they have used it well, strengthening their chains and regaining for the sector all the market share that ...

### Beauty and Personal Care Retailing - Italy

"Italy's BPC market is going through a period of change. The independents and regional chains are losing market share, whilst the leading specialists are capturing more spending as they continue to expand their geographical coverage. However, price competition is intense and the country's economic recovery has once again slowed, meaning ...

### Beauty and Personal Care Retailing - Spain

"Beauty and personal care specialists will have to offer a more compelling in-store and online experience in the next few years if they are to fend off the competitive challenge from non-specialist retailers. At the same time, they are going to have to adjust their business models to take into ...

### Beauty and Personal Care Retailing - France

"In a low growth market, the French specialist beauty sector remains relatively stable, with several well-performing retailers, notably Sephora, creating a dynamic environment. Elements of spending are well suited to shopping online, and most retailers now sell

### Beauty and Personal Care Retailing - Europe

"Beauty and personal care products (BPC) retailing is more varied around Europe than almost any other sector. From drugstores in Germany to supermarkets in other countries, the market is largely in the hands of



this way, with varying degrees of digital integration. Amazon poses an ongoing threat ...

## **Beauty and Personal Care Retailing - UK**

"The UK beauty and personal care market continues to be characterised by the polarised performance of the two core categories. Consumers continue to cut back on personal care, but are willing to spend on beauty. Health and beauty specialists have benefited from this trend, with robust demand for beauty fuelling ...

## **Home Hair Color - US**

"The home hair color market continues to struggle. Preferences for natural looks, concerns about damage, and complicated hair color trends—which are typically left to professionals—have placed downward pressure on the market. However, interest among both young and Black consumers is still strong, making them key markets for home hair color ...

## **Brand Overview: BPC - UK**

"The changing nature of wellbeing presents opportunities. While previously consumer focus may have been mainly about the impact of products on the body, we are already starting to see the mind take equal precedence. The inclusion of probiotics, adaptogens and aromatherapy claims to keep the whole body in balance could ...

## **Beauty and Personal Care - International**

non-specialists. But there is a fightback being staged by the specialists – Douglas has embarked on ...

## **Smoking Cessation and E-cigarettes - UK**

"The smoking cessation category is expected to decline in value in 2018 following a period of no breakthrough innovation as well as reduced recorded advertising spend since 2015. E-cigarettes, on the other hand, are predicted to have enjoyed strong value growth as smokers continue to use these as a smoking ...

## **Feminine Hygiene and Sanitary Protection Products - UK**

"The UK's ageing population has helped to create a fast-growing incontinence products market. That rosy picture doesn't extend to the sanitary protection and feminine hygiene categories, however. The former is contending with a long-term fall in sales, while the latter is struggling to really convince consumers as to what benefits ...