Beauty and Personal Care in the US

EXECUTIVE SUMMARY

Beauty and personal care in 2023: The big picture
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Competitive landscape
Retailing developments
What next for beauty and personal care?

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DISCLAIMER

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Baby and Child-Specific Products in the US

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2023 DEVELOPMENTS

Baby and child-specific products witnesses value growth in 2023, with the highlight being baby and child-specific sun care
Brands leverage claims to attract parents increasingly conscious of product safety and efficacy
Addressing the needs of melanin-rich skin with specialised products

PROSPECTS AND OPPORTUNITIES

Premiumisation will help boost value growth
Gen Alpha’s obsession with skin care set to drive growth for baby and child-specific skin care
Sustainability claims to gain further momentum in baby and child-specific products

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Price increases benefit value sales, while inconsistent volume growth is seen across categories
Skin-focused trends attract new players to body wash/shower gel
The "everything shower" expands product use and premiumisation

PROSPECTS AND OPPORTUNITIES

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Colour Cosmetics in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Lip products continues driving sales momentum in 2023, but rising value hacking behaviour, like dupe culture, narrows the growth gap between mass and premium
Facial make-up sees a boom as players adapt to consumers' skinification demands
Skin care and colour cosmetics hybridisation is the new standard, with expectations that products will address consumers' skin sensitivities

PROSPECTS AND OPPORTUNITIES

Expansion of beauty assortments at retailers such as Target and Walmart to support the growth of colour cosmetics in the forecast period
New premium and luxury entrants expected, although price sensitivity will present challenges to overcome
Skin care considerations will be increasingly sought out in colour cosmetics, opening the door for competition from skin care

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Deodorants in the US

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Double-digit value growth momentum
Renaissance in deodorants through premiumisation
Increased range of deodorants suited for different consumer demographics leads to new opportunities

PROSPECTS AND OPPORTUNITIES

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Deodorant as a scent expression in fragrance matching
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Depilatories in the US

KEY DATA FINDINGS

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Volume recovery despite slowing value growth
Brands attempt to rejuvenate hair removers/bleaches
The “everything shower” could spark growth opportunities for depilatories brands

PROSPECTS AND OPPORTUNITIES

Shaving-led body care products with hybrid benefits expected to premiumise
Opportunity for innovation outside the category from players in razors and blades
Segmented hair removal choices for consumers could inspire intra-category innovation

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Fragrances in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Resilience of premium fragrances continues in 2023, supported by consumers’ frequent usage
Consumers explore value hacks as they look for more affordable ways to engage with fragrances...
...although value hacking behaviour is not substantial enough to uplift mass fragrances

PROSPECTS AND OPPORTUNITIES
More cautious fragrance consumers are expected in the forecast period as beauty budgets are pressured.

Players in premium fragrances have opportunities to tap into discovery-driven purchase motivations by focusing on delivering a luxury experience.

As wellness and skin health are top-of-mind for beauty consumers, more innovation is expected in line with skinification or clean beauty motivations.

**CATEGORY DATA**

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**Hair Care in the US**

**KEY DATA FINDINGS**

**2023 DEVELOPMENTS**

- Mitigating inflation and appetite for value-focused premiumisation shape performance of hair care.
- Hair relaxant lawsuits reinforce desire for clean formulations.
- Bond-focused interest draws innovation from mass players.

**PROSPECTS AND OPPORTUNITIES**

- Beauty specialists see the potential in hair care.
- Acquisition activity drives portfolios forward, while players re-evaluate legacy lines.
- Technological investments aim for diversified opportunities.

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**Men's Grooming in the US**

**KEY DATA FINDINGS**

**2023 DEVELOPMENTS**

- Improving volume performances across men's shaving, hair care, and deodorants.
- Continued interest amongst male celebrities in brand-building within the men's grooming space.
- Influencer and celebrity marketing remains a strategic priority to elevate brand awareness.

**PROSPECTS AND OPPORTUNITIES**

- Men's skin care and hair care expected to premiumise through ingredient innovation.
Blurring wellness: Ingestible beauty for men
Deodorants diversification: Product variety reflects changing consumer needs

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Oral Care in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS
Performance driven by rippling inflationary environment and post-pandemic interest in oral health
Electric toothbrushes leads growth due to efficacy and innovation
Beauty formats bring variety to whitening innovation

PROSPECTS AND OPPORTUNITIES
Oral care tools act as an opportunity for adjacent diversification
Investment in young consumers creates early habits and brand awareness
Clean oral care supports the consumer desire for “better for you” products

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Skin Care in the US

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2023 DEVELOPMENTS
Dermocosmetics continues driving skin care in 2023, with affordability and expert backing being key
Convenience reigns supreme in the retail landscape as grocery retailers and Amazon expand their skin care footprint
Ingredient-led beauty witnesses consumers searching for gentler options suitable for sensitive skin concerns

PROSPECTS AND OPPORTUNITIES
A more proactive approach to skin care will support growth in the forecast period, with expectations of a more targeted approach to skin concerns
Make-up considerations will become increasingly important in new skin care product developments. International beauty brands should take note of consumers’ quest for gentle yet effective skin care products.

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**Sun Care in the US**

**KEY DATA FINDINGS**

**2023 DEVELOPMENTS**

Evolving landscape of sun care leads to double-digit value growth in 2023
Mineral-based sun protection products are becoming increasingly popular in sun care
Rise in demand for organic and vegan self-tanning products

**PROSPECTS AND OPPORTUNITIES**

The rise of skinification presents new avenues for brands to expand their offerings and explore new product categories
Growing emphasis on sustainability and safety considerations presents new opportunities for product development and growth
New sun protection ingredients to revolutionise sun care

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**Premium Beauty and Personal Care in the US**

**KEY DATA FINDINGS**

**2023 DEVELOPMENTS**

Premium beauty faces pressure from mass and masstige brands in 2023 amidst the rise of dupe culture
Luxury players continue deepening their penetration in US beauty and personal care
A growing number of retailers are eyeing opportunities in beauty and personal care, creating both challenges and opportunities for premium players

**PROSPECTS AND OPPORTUNITIES**

With both mass and premium innovations expected, premium players will benefit from focusing on premium features for which consumers are willing to pay extra
Premium players should explore strategies to help consumers overcome affordability concerns
Premium personal care expected to continue witnessing growth opportunities, fuelled by ingredient-oriented purchasing habits

**CATEGORY DATA**
KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for dermocosmetics is on rise, with safety and affordability being key
Skinification prevalent in mass brands across various product categories
Key strategy for health and personal care stores and hypermarkets is bringing in new brands to solidify consumer loyalty

PROSPECTS AND OPPORTUNITIES

Strong potential to meet premiumisation and affordability demands in beauty
Manufacturers and retailers are enthusiastically adopting sustainable practices to promote environmental responsibility
Consumer demand for dupes to help drive momentum for mass brands

CATEGORY DATA

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