EXECUTIVE SUMMARY

Beauty and personal care in 2022: The big picture
2022 key trends
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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2022 DEVELOPMENTS

Baby and child-specific sun care shows the strongest growth in 2022
Premium brands gaining share but mass products still dominate
Filling the gap with products for melanin-rich skin

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Hand sanitisers remains in decline as players favour skin-focused innovation
Eco-friendly packaging champions soap sustainability efforts

PROSPECTS AND OPPORTUNITIES

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2022 DEVELOPMENTS

Sales of colour cosmetics recover to pre-pandemic levels in 2022, driven by lip products
Players must adapt to and innovate in line with consumers’ low-maintenance approach to make-up
Consumer focus on maintaining skin health encourages more skinified launches

PROSPECTS AND OPPORTUNITIES

Expectation of value-driven consumer behaviour will likely lead to a focus on skin-first and multifunctional products in the forecast period
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The skinification of deodorants
Diverging success of deodorant formats

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KEY DATA FINDINGS

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PROSPECTS AND OPPORTUNITIES
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Fragrances in the US

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Consumers seeking out more diverse scents and brands as they explore building a fragrance “wardrobe”
Sustainability transforming into a driving force

PROSPECTS AND OPPORTUNITIES
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Styling agents remain steady with help of “clean” trend

Olaplex Virtual Salon channels virtual reality in path to purchase

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Men's Grooming in the US

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**

Despite brands' best efforts, men's shaving returns to recording declining volume sales

Men's premium skin care sees double-digit current value growth in 2022

Male celebrities enter the skin care space

**PROSPECTS AND OPPORTUNITIES**

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Oral care in the US

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2022 DEVELOPMENTS

Premiumisation enters oral care with Colgate Optic White Pro Series Toothpaste
Issue-specific formulations in mouthwash attract attention in the post-pandemic period
Environmentally-friendly packaging and formats continue to lead efforts in oral care sustainability

PROSPECTS AND OPPORTUNITIES

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Clean ingredients support oral care establishment in the beauty space

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Skin Care in the US

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Self-care and skin-health trends drive skin care in 2022
Strength of ingredient-led beauty solidified by renewed interest in natural and organic ingredients
Body care attracts consumer attention in 2022

PROSPECTS AND OPPORTUNITIES

Players must be mindful of their value-proposition over the forecast period
Changing consumer behaviour to present challenges and opportunities
Growing holistic wellness initiatives will present more innovation opportunities
KEY DATA FINDINGS

SUN CARE IN THE US

2022 DEVELOPMENTS
Health awareness against the background of post-pandemic recovery driving sun protection
Self-tanning and aftersun gaining momentum with improved distribution and social media campaigns
Innovation focusing on value-added features continues to drive facial sun care

PROSPECTS AND OPPORTUNITIES
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PREMIUM BEAUTY AND PERSONAL CARE IN THE US

2022 DEVELOPMENTS
Premium segment focuses on efficacy and broader wellness
Building on product experience and variety across retail platforms
Tapping into Gen Zers with ingredient-led innovation and power of social media

PROSPECTS AND OPPORTUNITIES
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Mass Beauty and Personal Care in the US

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Skinification in mass-market brands across product categories

PROSPECTS AND OPPORTUNITIES
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