

Beauty and Personal Care in the United Kingdom May 2024

Table of Contents

Beauty and Personal Care in the United Kingdom

EXECUTIVE SUMMARY

Beauty and personal care in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for beauty and personal care?

MARKET DATA

- Table 1 Sales of Beauty and Personal Care by Category: Value 2018-2023
- Table 2 Sales of Beauty and Personal Care by Category: % Value Growth 2018-2023
- Table 3 GBO Company Shares of Beauty and Personal Care: % Value 2019-2023
- Table 4 NBO Company Shares of Beauty and Personal Care: % Value 2019-2023
- Table 5 LBN Brand Shares of Beauty and Personal Care: % Value 2020-2023
- Table 6 Penetration of Private Label in Beauty and Personal Care by Category: % Value 2018-2023
- Table 7 Distribution of Beauty and Personal Care by Format: % Value 2018-2023
- Table 8 Distribution of Beauty and Personal Care by Format and Category: % Value 2023
- Table 9 Forecast Sales of Beauty and Personal Care by Category: Value 2023-2028
- Table 10 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Value sales of baby and child-specific products increase as unit prices rise

Consumers looking for most suitable products for their children boost premium sales

Retail offline remains essential for purchases of baby and child-specific products

PROSPECTS AND OPPORTUNITIES

UK's declining birth rate set to prevent significant expansion of baby and child-specific products over forecast period Natural trend to push reduction of ingredients and increase focus on natural origins

Product development will be influenced by rising importance of wellness routines

CATEGORY DATA

- Table 11 Sales of Baby and Child-specific Products by Category: Value 2018-2023
- Table 12 Sales of Baby and Child-specific Products by Category: % Value Growth 2018-2023
- Table 13 Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2018-2023
- Table 14 NBO Company Shares of Baby and Child-specific Products: % Value 2019-2023
- Table 15 LBN Brand Shares of Baby and Child-specific Products: % Value 2020-2023
- Table 16 LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2020-2023
- Table 17 LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2020-2023
- Table 18 LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2020-2023
- Table 19 Forecast Sales of Baby and Child-specific Products by Category: Value 2023-2028
- Table 20 Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2023-2028
- Table 21 Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2023-2028

Bath and Shower in the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bath and shower records improving value sales, while volumes continue to drop

Private label growth and shrinkflation are major challenges for bath and shower

Premium segment supported by consumers seeking benefits beyond simple functionality

PROSPECTS AND OPPORTUNITIES

Lines across bath and shower to blur with launch of more hybrid and multifunctional products Refillable formats set to grow significantly over forecast period Increasing focus on women's health and wellness to fuel sales of intimate washes

CATEGORY DATA

- Table 22 Sales of Bath and Shower by Category: Value 2018-2023
- Table 23 Sales of Bath and Shower by Category: % Value Growth 2018-2023
- Table 24 Sales of Bath and Shower by Premium vs Mass: % Value 2018-2023
- Table 25 NBO Company Shares of Bath and Shower: % Value 2019-2023
- Table 26 LBN Brand Shares of Bath and Shower: % Value 2020-2023
- Table 27 LBN Brand Shares of Premium Bath and Shower: % Value 2020-2023
- Table 28 Forecast Sales of Bath and Shower by Category: Value 2023-2028
- Table 29 Forecast Sales of Bath and Shower by Category: % Value Growth 2023-2028
- Table 30 Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2023-2028

Colour Cosmetics in the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Flat demand in 2023, with inflation further supporting value sales growth TikTok remains a driving force behind category trends

Price sensitivity drives further consumer polarisation based on spend

PROSPECTS AND OPPORTUNITIES

Tech developments to boost e-commerce sales of colour cosmetics Independent brands to drive trends Sustainability under threat as consumers prioritise tangible benefits

CATEGORY DATA

- Table 31 Sales of Colour Cosmetics by Category: Value 2018-2023
- Table 32 Sales of Colour Cosmetics by Category: % Value Growth 2018-2023
- Table 33 NBO Company Shares of Colour Cosmetics: % Value 2019-2023
- Table 34 LBN Brand Shares of Colour Cosmetics: % Value 2020-2023
- Table 35 LBN Brand Shares of Eye Make-up: % Value 2020-2023
- Table 36 LBN Brand Shares of Facial Make-up: % Value 2020-2023
- Table 37 LBN Brand Shares of Lip Products: % Value 2020-2023
- Table 38 LBN Brand Shares of Nail Products: % Value 2020-2023
- Table 39 LBN Brand Shares of Premium Colour Cosmetics: % Value 2020-2023
- Table 40 Forecast Sales of Colour Cosmetics by Category: Value 2023-2028
- Table 41 Forecast Sales of Colour Cosmetics by Category: % Value Growth 2023-2028

Deodorants in the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

New players gradually strengthen their positions through innovation and versatility

Skinification of underarms continues to drive innovation in deodorants

Private label offers alternative during times of inflationary pressure

PROSPECTS AND OPPORTUNITIES

Stick format set to record fastest growth, driven by revitalisation efforts and expansion of new competitors Increasing emphasis on sustainability set to drive growth of refillable deodorants Innovation will continue driving growth of deodorants over forecast period

CATEGORY DATA

Table 42 - Sales of Deodorants by Category: Value 2018-2023

Table 43 - Sales of Deodorants by Category: % Value Growth 2018-2023

Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2018-2023

Table 45 - NBO Company Shares of Deodorants: % Value 2019-2023

Table 46 - LBN Brand Shares of Deodorants: % Value 2020-2023

Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2020-2023

Table 48 - Forecast Sales of Deodorants by Category: Value 2023-2028

Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2023-2028

Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2023-2028

Depilatories in the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Disposables women's razors and blades benefit from affordability and return of travel

Body positivity and acceptance continue to reshape depilatories

Razor subscription services reach saturation point as physical stores continue to drive category sales

PROSPECTS AND OPPORTUNITIES

Skinification will continue to drive innovation in depilatories

Face shaving set to gain further popularity among women

Despite emerging sustainable products, depilatories will primarily focus on maintaining a price advantage

CATEGORY DATA

Table 51 - Sales of Depilatories by Category: Value 2018-2023

Table 52 - Sales of Depilatories by Category: % Value Growth 2018-2023

Table 53 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2019-2023

Table 54 - NBO Company Shares of Depilatories: % Value 2019-2023

Table 55 - LBN Brand Shares of Depilatories: % Value 2020-2023

Table 56 - Forecast Sales of Depilatories by Category: Value 2023-2028

Table 57 - Forecast Sales of Depilatories by Category: % Value Growth 2023-2028

Fragrances in the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Further growth momentum for fragrances in 2023

Mass women's fragrances gain traction

Sustainability remains key feature of new product development

PROSPECTS AND OPPORTUNITIES

Solid retail strategy to boost in-store sales

Natural and environmentally-friendly products offer high potential for the future

Growth of niche brands to accelerate

CATEGORY DATA

- Table 58 Sales of Fragrances by Category: Value 2018-2023
- Table 59 Sales of Fragrances by Category: % Value Growth 2018-2023
- Table 60 NBO Company Shares of Fragrances: % Value 2019-2023
- Table 61 LBN Brand Shares of Fragrances: % Value 2020-2023
- Table 62 LBN Brand Shares of Premium Men's Fragrances: % Value 2020-2023
- Table 63 LBN Brand Shares of Premium Women's Fragrances: % Value 2020-2023
- Table 64 Forecast Sales of Fragrances by Category: Value 2023-2028
- Table 65 Forecast Sales of Fragrances by Category: % Value Growth 2023-2028

Hair Care in the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive sales driven by strong year for styling agents and conditioners and treatments

Poor year for Olaplex impacts salon professional hair care's performance

Boots places greater focus on salon professional brands

PROSPECTS AND OPPORTUNITIES

Launch activity to focus on premium features and sustainability

Growing focus on undeveloped segments provides category opportunities

Volumes of standard shampoos and 2-in-1 products set to fall over forecast period

CATEGORY DATA

- Table 66 Sales of Hair Care by Category: Value 2018-2023
- Table 67 Sales of Hair Care by Category: % Value Growth 2018-2023
- Table 68 Sales of Hair Care by Premium vs Mass: % Value 2018-2023
- Table 69 NBO Company Shares of Hair Care: % Value 2019-2023
- Table 70 NBO Company Shares of Salon Professional Hair Care: % Value 2019-2023
- Table 71 LBN Brand Shares of Hair Care: % Value 2020-2023
- Table 72 LBN Brand Shares of Colourants: % Value 2020-2023
- Table 73 LBN Brand Shares of Salon Professional Hair Care: % Value 2020-2023
- Table 74 LBN Brand Shares of Styling Agents: % Value 2020-2023
- Table 75 LBN Brand Shares of Premium Hair Care: % Value 2020-2023
- Table 76 Forecast Sales of Hair Care by Category: Value 2023-2028
- Table 77 Forecast Sales of Hair Care by Category: % Value Growth 2023-2028
- Table 78 Forecast Sales of Hair Care by Premium vs Mass: % Value 2023-2028

Men's Grooming in the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Solid performance for men's grooming in 2023

Men's deodorants benefits from greater mobility post-pandemic

Mass brands outperform premium segment in men's toiletries

PROSPECTS AND OPPORTUNITIES

Diminishing demand for traditional shaving products

Brands need to invest more in advertising that targets male audiences

Increasing competition from independent brands

CATEGORY DATA

- Table 79 Sales of Men's Grooming by Category: Value 2018-2023
- Table 80 Sales of Men's Grooming by Category: % Value Growth 2018-2023
- Table 81 Sales of Men's Razors and Blades by Type: % Value Breakdown 2020-2023
- Table 82 Sales of Men's Skin Care by Type: % Value Breakdown 2020-2023
- Table 83 NBO Company Shares of Men's Grooming: % Value 2019-2023
- Table 84 LBN Brand Shares of Men's Grooming: % Value 2020-2023
- Table 85 LBN Brand Shares of Men's Razors and Blades: % Value 2020-2023
- Table 86 Forecast Sales of Men's Grooming by Category: Value 2023-2028
- Table 87 Forecast Sales of Men's Grooming by Category: % Value Growth 2023-2028

Oral Care in the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales driven by the continual popularity of oral care routines at home A growing preference for dentures is driving up sales of denture care Whitening products continue to gain popularity, influenced by TikTok

PROSPECTS AND OPPORTUNITIES

Rising awareness of oral health importance will continue to propel category growth The "smart" era of electric toothbrushes will be primary factor in future growth Sustainability will continue to drive innovation in oral care

CATEGORY DATA

- Table 88 Sales of Oral Care by Category: Value 2018-2023
- Table 89 Sales of Oral Care by Category: % Value Growth 2018-2023
- Table 90 Sales of Toothbrushes by Category: Value 2018-2023
- Table 91 Sales of Toothbrushes by Category: % Value Growth 2018-2023
- Table 92 Sales of Toothpaste by Type: % Value Breakdown 2019-2023
- Table 93 NBO Company Shares of Oral Care: % Value 2019-2023
- Table 94 LBN Brand Shares of Oral Care: % Value 2020-2023
- Table 95 LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2020-2023
- Table 96 LBN Brand Shares of Toothpaste: % Value 2020-2023
- Table 97 Forecast Sales of Oral Care by Category: Value 2023-2028
- Table 98 Forecast Sales of Oral Care by Category: % Value Growth 2023-2028
- Table 99 Forecast Sales of Toothbrushes by Category: Value 2023-2028
- Table 100 Forecast Sales of Toothbrushes by Category: % Value Growth 2023-2028

Skin Care in the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumer appetite for skin care remains resilient amid price increases

Dermocosmetics and independent brands continue to disrupt longstanding names

Boots N°7 Future Renew series gains significant ground

PROSPECTS AND OPPORTUNITIES

Blurring the space between mass and premium expected to drive forecast growth Hybrid options pose both opportunities and challenges for skin care Ingredient-led focus to become the norm for skin care consumers

CATEGORY DATA

- Table 101 Sales of Skin Care by Category: Value 2018-2023
- Table 102 Sales of Skin Care by Category: % Value Growth 2018-2023
- Table 103 NBO Company Shares of Skin Care: % Value 2019-2023
- Table 104 LBN Brand Shares of Skin Care: % Value 2020-2023
- Table 105 LBN Brand Shares of Basic Moisturisers: % Value 2020-2023
- Table 106 LBN Brand Shares of Anti-agers: % Value 2020-2023
- Table 107 LBN Brand Shares of Firming Body Care: % Value 2020-2023
- Table 108 LBN Brand Shares of General Purpose Body Care: % Value 2020-2023
- Table 109 LBN Brand Shares of Premium Skin Care: % Value 2020-2023
- Table 110 Forecast Sales of Skin Care by Category: Value 2023-2028
- Table 111 Forecast Sales of Skin Care by Category: % Value Growth 2023-2028

Sun Care in the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sun care continues to grow in 2023

Self-tanning maintains flat demand as younger consumers embrace their true selves

E-commerce sales grow but retail offline drives sun care distribution

PROSPECTS AND OPPORTUNITIES

Growing awareness of sun protection's importance to continue driving sales

Competition from other SPF-containing categories unlikely to have significant impact on demand for sun care

Sun care formulations set to be impacted by regulations regarding ingredients and sustainability

CATEGORY DATA

- Table 112 Sales of Sun Care by Category: Value 2018-2023
- Table 113 Sales of Sun Care by Category: % Value Growth 2018-2023
- Table 114 NBO Company Shares of Sun Care: % Value 2019-2023
- Table 115 LBN Brand Shares of Sun Care: % Value 2020-2023
- Table 116 LBN Brand Shares of Premium Adult Sun Care: % Value 2020-2023
- Table 117 Forecast Sales of Sun Care by Category: Value 2023-2028
- Table 118 Forecast Sales of Sun Care by Category: % Value Growth 2023-2028

Premium Beauty and Personal Care in the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premium beauty and personal care continues to be driven by TikTok trends

Premium fragrances continues to drive value sales in 2023

Ingredients become as important as brand name in terms of premium feature

PROSPECTS AND OPPORTUNITIES

Brand expansion and M&A activity indicate growth for the forecast period

Younger consumers invest in premiums brands

Minimal threat for premium products from "dupe" culture

CATEGORY DATA

- Table 119 Sales of Premium Beauty and Personal Care by Category: Value 2018-2023
- Table 120 Sales of Premium Beauty and Personal Care by Category: % Value Growth 2018-2023
- Table 121 NBO Company Shares of Premium Beauty and Personal Care: % Value 2019-2023

Table 122 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2020-2023

Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2023-2028

Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2023-2028

Mass Beauty and Personal Care in the United Kingdom

KEY DATA FINDINGS

2023 DEVELOPMENTS

Further growth momentum for mass beauty and personal care in the UK Private label helps fuel growth in 2023

Mass beauty segment reflects the shifting landscape of retail

PROSPECTS AND OPPORTUNITIES

Optimistic outlook for mass segment over the forecast period Mass brands make their foray into the premium segment The rise in popularity of social media and "dupe" culture

CATEGORY DATA

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2018-2023

Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2019-2023

Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2020-2023

Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2023-2028

Table 130 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focusing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus
 of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
 trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
 country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/beauty-and-personal-care-in-the-united-kingdom/report.