Beauty and Personal Care in India

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?

MARKET DATA

Table 1 - Sales of Beauty and Personal Care by Category: Value 2017-2022
Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2018-2022
Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2018-2022
Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2019-2022
Table 6 - Distribution of Beauty and Personal Care by Format: % Value 2017-2022
Table 7 - Distribution of Beauty and Personal Care by Format and Category: % Value 2022
Table 8 - Forecast Sales of Beauty and Personal Care by Category: Value 2022-2027
Table 9 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in India

KEY DATA FINDINGS

2022 DEVELOPMENTS

Competition intensifies on the back of funding and acquisitions
Brands leverage claims to attract parents increasingly conscious of product safety and efficacy
Developing an e-commerce ecosystem benefits baby and child-specific products

PROSPECTS AND OPPORTUNITIES

Premiumisation set to be driven by well-informed modern parents
Growth potential due to significant population base aged 0-11, along with white space in child-specific products
Brands increasingly position combo products as gift items to drive uptake in urban areas

CATEGORY DATA

Table 10 - Sales of Baby and Child-specific Products by Category: Value 2017-2022
Table 11 - Sales of Baby and Child-specific Products by Category: % Value Growth 2017-2022
Table 12 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2017-2022
Table 13 - NBO Company Shares of Baby and Child-specific Products: % Value 2018-2022
Table 14 - LBN Brand Shares of Baby and Child-specific Products: % Value 2019-2022
Table 15 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2019-2022
Table 16 - Forecast Sales of Baby and Child-specific Products by Category: Value 2022-2027
Table 17 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2022-2027
Table 18 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2022-2027

Bath and Shower in India

KEY DATA FINDINGS

2022 DEVELOPMENTS
Brands increasingly highlight key ingredients to fuel premiumisation within bar soap
Manufacturers focus on multifunctional benefits for body wash/shower gel to drive demand in urban areas
Significant contraction in demand for hand sanitisers as consumers return to their pre-pandemic habits

PROSPECTS AND OPPORTUNITIES
Body wash/shower gel brands set to leverage e-commerce and affordable packs to boost demand
Sustainability set to increasingly make its way into bath and shower
Premiumisation trend to further accelerate within bath and shower

CATEGORY DATA
Table 19 - Sales of Bath and Shower by Category: Value 2017-2022
Table 20 - Sales of Bath and Shower by Category: % Value Growth 2017-2022
Table 21 - Sales of Bath and Shower by Premium vs Mass: % Value 2017-2022
Table 22 - NBO Company Shares of Bath and Shower: % Value 2018-2022
Table 23 - LBN Brand Shares of Bath and Shower: % Value 2019-2022
Table 24 - Forecast Sales of Bath and Shower by Category: Value 2022-2027
Table 25 - Forecast Sales of Bath and Shower by Category: % Value Growth 2022-2027
Table 26 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2022-2027

Colour Cosmetics in India

KEY DATA FINDINGS

2022 DEVELOPMENTS
Return of social events and a greater focus on multifunctional offerings allow colour cosmetics to recover its value sales
Rising consumer awareness due to increased digital engagement brings ingredients to the forefront
Manufacturers focus on an omnichannel presence to cater to a wide range of customer needs in terms of convenience and trials

PROSPECTS AND OPPORTUNITIES
Wide range of offerings, convenience, and use of innovative technology set to allow e-commerce to grow further
Expansion beyond female target audience offers white space for growth
Brands could look to democratise personalisation through mass customised offerings, similar to the trend witnessed in hair care

CATEGORY DATA
Table 27 - Sales of Colour Cosmetics by Category: Value 2017-2022
Table 28 - Sales of Colour Cosmetics by Category: % Value Growth 2017-2022
Table 29 - NBO Company Shares of Colour Cosmetics: % Value 2018-2022
Table 30 - LBN Brand Shares of Colour Cosmetics: % Value 2019-2022
Table 31 - LBN Brand Shares of Eye Make-up: % Value 2019-2022
Table 32 - LBN Brand Shares of Facial Make-up: % Value 2019-2022
Table 33 - LBN Brand Shares of Lip Products: % Value 2019-2022
Table 34 - LBN Brand Shares of Nail Products: % Value 2019-2022
Table 35 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2019-2022
Table 36 - Forecast Sales of Colour Cosmetics by Category: Value 2022-2027
Table 37 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2022-2027

Deodorants in India

KEY DATA FINDINGS

2022 DEVELOPMENTS
Surge in travel and return of outdoor fitness activities accelerate the growth of deodorants
Greater focus on brand ambassadors to drive strong brand awareness amongst the target audience
Convenience and affordability allow pocket-sized deodorants to attract consumer demand
PROSPECTS AND OPPORTUNITIES
Weather conditions and growing participation in sports activities offer avenues for growth
Premium perception, coupled with limited retail presence, set to keep deodorant roll-ons as a relative niche
Affordable prices of local fragrance brands set to intensify competition for deodorants

CATEGORY DATA
Table 38 - Sales of Deodorants by Category: Value 2017-2022
Table 39 - Sales of Deodorants by Category: % Value Growth 2017-2022
Table 40 - Sales of Deodorants by Premium vs Mass: % Value 2017-2022
Table 41 - NBO Company Shares of Deodorants: % Value 2018-2022
Table 42 - LBN Brand Shares of Deodorants: % Value 2019-2022
Table 43 - LBN Brand Shares of Premium Deodorants: % Value 2019-2022
Table 44 - Forecast Sales of Deodorants by Category: Value 2022-2027
Table 45 - Forecast Sales of Deodorants by Category: % Value Growth 2022-2027
Table 46 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2022-2027

Deplatories in India

KEY DATA FINDINGS

2022 DEVELOPMENTS
Depilatories witnesses a return to growth in value terms in 2022
Brands leverage promotional campaigns with brand ambassadors to bolster awareness
Increasing mobile internet penetration, coupled with quick commerce, further drives sales via e-commerce

PROSPECTS AND OPPORTUNITIES
Brand extensions to target men set to provide growth opportunities
Strong competition for depilatories from salons and laser hair removal
Increased exposure to global culture and rising urbanisation open up room for growth

CATEGORY DATA
Table 47 - Sales of Depilatories by Category: Value 2017-2022
Table 48 - Sales of Depilatories by Category: % Value Growth 2017-2022
Table 49 - NBO Company Shares of Depilatories: % Value 2018-2022
Table 50 - LBN Brand Shares of Depilatories: % Value 2019-2022
Table 51 - Forecast Sales of Depilatories by Category: Value 2022-2027
Table 52 - Forecast Sales of Depilatories by Category: % Value Growth 2022-2027

Fragrances in India

KEY DATA FINDINGS

2022 DEVELOPMENTS
Conducive external factors drive growth in fragrances in 2022
Focus on affordable packs to attract increased consumer demand for fragrances
Competition within premium fragrances intensifies with entry of new international brands and extensions from existing mass fragrances brands

PROSPECTS AND OPPORTUNITIES
Expansion of retail offline channels, coupled with more campaigns to educate consumers, key to increasing penetration of fragrances
Increasing employed population and rising aspirations set to push demand for premium fragrances

CATEGORY DATA
Table 53 - Sales of Fragrances by Category: Value 2017-2022
Table 54 - Sales of Fragrances by Category: % Value Growth 2017-2022
Hair Care in India

KEY DATA FINDINGS

2022 DEVELOPMENTS

“Skinification” of hair influences hair care
Hair fall remains a major concern for the Indian population
Hair oil brands focused on ingredient-led product positioning drive growth

PROSPECTS AND OPPORTUNITIES

Digital-first brands help companies attract younger consumers
Personalisation and customisation to have a key role in the growth of new hair care brands
Emergence of shampoo bars as a novel format in the forecast period

CATEGORY DATA

Table 61 - Sales of Hair Care by Category: Value 2017-2022
Table 62 - Sales of Hair Care by Category: % Value Growth 2017-2022
Table 63 - Sales of Hair Care by Premium vs Mass: % Value 2017-2022
Table 64 - NBO Company Shares of Hair Care: % Value 2018-2022
Table 65 - NBO Company Shares of Salon Professional Hair Care: % Value 2018-2022
Table 66 - LBN Brand Shares of Hair Care: % Value 2019-2022
Table 67 - LBN Brand Shares of Colourants: % Value 2019-2022
Table 68 - LBN Brand Shares of Salon Professional Hair Care: % Value 2019-2022
Table 69 - LBN Brand Shares of Styling Agents: % Value 2019-2022
Table 70 - LBN Brand Shares of Premium Hair Care: % Value 2019-2022
Table 71 - Forecast Sales of Hair Care by Category: Value 2022-2027
Table 72 - Forecast Sales of Hair Care by Category: % Value Growth 2022-2027
Table 73 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2022-2027

Men's Grooming in India

KEY DATA FINDINGS

2022 DEVELOPMENTS

Strong performance despite inflation and supply chain challenges
Men's grooming maintains growth due to more attention on appearance
Fmcg giants eye growing opportunities in men's grooming

PROSPECTS AND OPPORTUNITIES

E-commerce to drive growth and penetration for the category
New emerging categories such as beard oil expected to flourish in the forecast period
Men's fragrances and men's skin care expected to experience rapid growth during the forecast period

CATEGORY DATA

Table 74 - Sales of Men's Grooming by Category: Value 2017-2022
Table 75 - Sales of Men's Grooming by Category: % Value Growth 2017-2022
Table 76 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2019-2022
Table 77 - Sales of Men's Skincare by Type: % Value Breakdown 2019-2022
Table 78 - Sales of Men's Grooming by Premium vs Mass: % Value 2019-2022
Table 79 - Forecast Sales of Men's Grooming by Category: Value 2022-2027
Table 80 - Forecast Sales of Men's Grooming by Category: % Value Growth 2022-2027
Table 81 - Forecast Sales of Men's Grooming by Premium vs Mass: % Value 2022-2027
Table 77 - Sales of Men's Skin Care by Type: % Value Breakdown 2019-2022
Table 78 - NBO Company Shares of Men's Grooming: % Value 2018-2022
Table 79 - LBN Brand Shares of Men's Grooming: % Value 2019-2022
Table 80 - LBN Brand Shares of Men's Razors and Blades: % Value 2019-2022
Table 81 - Forecast Sales of Men's Grooming by Category: Value 2022-2027
Table 82 - Forecast Sales of Men's Grooming by Category: % Value Growth 2022-2027

Oral Care in India

KEY DATA FINDINGS

2022 DEVELOPMENTS
Increasing prevalence of whitening and brightening claims fuels growth
Dental care companies strive to improve oral hygiene amongst Indian consumers
Introduction of novel products drives the emergence of new segments

PROSPECTS AND OPPORTUNITIES
Low per capita consumption sets the stage for expansion in the coming years
Oral care brands start to move towards sustainable packaging
Although new oral care categories are emerging, toothpaste likely to remain the most popular product

CATEGORY DATA
Table 83 - Sales of Oral Care by Category: Value 2017-2022
Table 84 - Sales of Oral Care by Category: % Value Growth 2017-2022
Table 85 - Sales of Toothbrushes by Category: Value 2017-2022
Table 86 - Sales of Toothbrushes by Category: % Value Growth 2017-2022
Table 87 - Sales of Toothpaste by Type: % Value Breakdown 2018-2022
Table 88 - NBO Company Shares of Oral Care: % Value 2018-2022
Table 89 - LBN Brand Shares of Oral Care: % Value 2019-2022
Table 90 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2019-2022
Table 91 - LBN Brand Shares of Toothpaste: % Value 2019-2022
Table 92 - Forecast Sales of Oral Care by Category: Value 2022-2027
Table 93 - Forecast Sales of Oral Care by Category: % Value Growth 2022-2027
Table 94 - Forecast Sales of Toothbrushes by Category: Value 2022-2027
Table 95 - Forecast Sales of Toothbrushes by Category: % Value Growth 2022-2027

Skin Care in India

KEY DATA FINDINGS

2022 DEVELOPMENTS
Functional skin care gains popularity amongst younger consumers
Ayurveda continues to gain momentum in skin care
Blurring of the distinction between skin care and colour cosmetics

PROSPECTS AND OPPORTUNITIES
Skin care expected to see consistent growth in the forecast period
Restoring the skin barrier will continue to be important in the forecast period
Growing urbanisation and rising number of dual-income households set to fuel growth in the forecast period

CATEGORY DATA
Table 96 - Sales of Skin Care by Category: Value 2017-2022
Table 97 - Sales of Skin Care by Category: % Value Growth 2017-2022
Table 98 - NBO Company Shares of Skin Care: % Value 2018-2022
Sun Care in India

KEY DATA FINDINGS

2022 DEVELOPMENTS

Return of mobility and extended summer benefit sun care in 2022
Competition intensifies in sun care, as players capitalise on opportunities
Innovations in product formulations and formats to cater to a wider audience

PROSPECTS AND OPPORTUNITIES

Sun protection, being an integral part of minimalistic skin care, will see growth in the forecast period
Adoption of herbal ingredients in sun care products expected to further attract consumers
Wide availability has made products more affordable, which will raise demand in the years to come

CATEGORY DATA

Table 107 - Sales of Sun Care by Category: Value 2017-2022
Table 108 - Sales of Sun Care by Category: % Value Growth 2017-2022
Table 109 - NBO Company Shares of Sun Care: % Value 2018-2022
Table 110 - LBN Brand Shares of Sun Care: % Value 2019-2022
Table 111 - LBN Brand Shares of Premium Adult Sun Care: % Value 2019-2022
Table 112 - Forecast Sales of Sun Care by Category: Value 2022-2027
Table 113 - Forecast Sales of Sun Care by Category: % Value Growth 2022-2027

Premium Beauty and Personal Care in India

KEY DATA FINDINGS

2022 DEVELOPMENTS

Changing dynamics and increased global exposure favour premium beauty and personal care
Digitalisation and growing popularity of beauty e-tailers promote accessibility to consumers
Potential for premium beauty and personal care in India attracts attention from international brands

PROSPECTS AND OPPORTUNITIES

Millennials and younger consumers will drive demand for premium beauty and personal care
Hair care and skin care will continue to drive growth in premium beauty and personal care
Natural ingredients-based products beyond skin care to be prominent in premium beauty and personal care

CATEGORY DATA

Table 114 - Sales of Premium Beauty and Personal Care by Category: Value 2017-2022
Table 115 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 116 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2018-2022
Table 117 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2019-2022
Table 118 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2022-2027
Table 119 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2022-2027
Mass Beauty and Personal Care in India

KEY DATA FINDINGS

2022 DEVELOPMENTS
Mass beauty and personal care continues to dominate, and grows due to inflationary pressure
Mass colour cosmetics witnesses the fastest growth on the back of rising consciousness of personal grooming
E-commerce helps mass beauty and personal care to expand its reach and attract demand from digital-savvy consumers

PROSPECTS AND OPPORTUNITIES
Inclusive positioning of mass beauty products expected to contribute to growth
Multi-benefit, cost-effective product options likely to surge in the forecast period
Penetration of mass beauty brands beyond tier-1 cities to fuel demand

CATEGORY DATA
Table 120 - Sales of Mass Beauty and Personal Care by Category: Value 2017-2022
Table 121 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 122 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2018-2022
Table 123 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2019-2022
Table 124 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2022-2027
Table 125 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2022-2027

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