



Beauty and Personal Care in the United Kingdom

May 2022

Table of Contents

Beauty and Personal Care in the United Kingdom

EXECUTIVE SUMMARY

Beauty and personal care in 2021: The big picture

2021 key trends

Competitive landscape

Retailing developments

What next for beauty and personal care?

Chart 1 - Beauty and Personal Care Value Sales Growth Scenarios: 2019-2026

Chart 2 - Beauty and Personal Care Impact of Soft Drivers on Value Sales: 2019-2026

MARKET DATA

Table 1 - Sales of Beauty and Personal Care by Category: Value 2016-2021

Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2016-2021

Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2017-2021

Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2017-2021

Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2018-2021

Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2016-2021

Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2016-2021

Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2021

Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2021-2026

Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2021-2026

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Mass Beauty and Personal Care in the United Kingdom

KEY DATA FINDINGS

2021 DEVELOPMENTS

Premium features boost mass skin care

Sustained demand for mass colour cosmetics brands in 2021

Mass fragrances continues to suffer in 2021

PROSPECTS AND OPPORTUNITIES

Hybridity and e-commerce present challenges for mass skin care

Mass colour cosmetics to see continued growth

Mass fragrances likely to continue to experience declining sales

CATEGORY DATA

Table 11 - Sales of Mass Beauty and Personal Care by Category: Value 2016-2021

Table 12 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2016-2021

Table 13 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2017-2021

Table 14 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2018-2021

Table 15 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2021-2026

Table 16 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2021-2026

Premium Beauty and Personal Care in the United Kingdom

KEY DATA FINDINGS

2021 DEVELOPMENTS

Experiential retail drives premium skin care

Premium colour cosmetics returns to growth, with a focus on nails and eyes

Premium fragrances sees double-digit growth in 2021, but lower sales than 2019

PROSPECTS AND OPPORTUNITIES

Body care offers growth, while teledermatology increases the competition

Premium colour cosmetics to record continued growth to 2026

Premium fragrances will continue to see growth in the forecast period

CATEGORY DATA

Table 17 - Sales of Premium Beauty and Personal Care by Category: Value 2016-2021

Table 18 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2016-2021

Table 19 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2017-2021

Table 20 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2018-2021

Table 21 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2021-2026

Table 22 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2021-2026

Baby and Child-Specific Products in the United Kingdom

KEY DATA FINDINGS

2021 DEVELOPMENTS

Recovery for both value and volume sales in 2021

Baby and child-specific toiletries experiences the highest year-on-year growth

Premiumisation continues, but private label ranges remain essential

PROSPECTS AND OPPORTUNITIES

Value and volume growth expected in the forecast period, but mitigated by declining birth rate

Ever-increasing popularity of brands with natural and sustainable ingredients

Diversification in distribution channels for baby and child-specific products

CATEGORY DATA

Table 23 - Sales of Baby and Child-specific Products by Category: Value 2016-2021

Table 24 - Sales of Baby and Child-specific Products by Category: % Value Growth 2016-2021

Table 25 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2016-2021

Table 26 - NBO Company Shares of Baby and Child-specific Products: % Value 2017-2021

Table 27 - LBN Brand Shares of Baby and Child-specific Products: % Value 2018-2021

Table 28 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2018-2021

Table 29 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2018-2021

Table 30 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2018-2021

Table 31 - Forecast Sales of Baby and Child-specific Products by Category: Value 2021-2026

Table 32 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2021-2026

Table 33 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2021-2026

Bath and Shower in the United Kingdom

KEY DATA FINDINGS

2021 DEVELOPMENTS

Reductions in sales of hand sanitisers and liquid soap

Hygiene habits adopted in 2020 lockdowns endure in 2021

Fair number of promotional activities to encourage purchasing

PROSPECTS AND OPPORTUNITIES

Extent of decline in hand sanitisers after 2020 depends on permanence of new hygiene routines

Focus on natural and organic products set to continue unabated
Trend for dissolvable zero-waste body wash matches desire for sustainability

CATEGORY DATA

Table 34 - Sales of Bath and Shower by Category: Value 2016-2021
Table 35 - Sales of Bath and Shower by Category: % Value Growth 2016-2021
Table 36 - Sales of Bath and Shower by Premium vs Mass: % Value 2016-2021
Table 37 - NBO Company Shares of Bath and Shower: % Value 2017-2021
Table 38 - LBN Brand Shares of Bath and Shower: % Value 2018-2021
Table 39 - LBN Brand Shares of Premium Bath and Shower: % Value 2018-2021
Table 40 - Forecast Sales of Bath and Shower by Category: Value 2021-2026
Table 41 - Forecast Sales of Bath and Shower by Category: % Value Growth 2021-2026
Table 42 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2021-2026

Colour Cosmetics in the United Kingdom

KEY DATA FINDINGS

2021 DEVELOPMENTS

Colour cosmetics returns to growth
Consumers demand products with multifunctionality and added benefits
Omnichannel and digital strategy essential for make-up brands to maintain sales

PROSPECTS AND OPPORTUNITIES

Value growth set to continue to 2026
Move towards reduced make-up routines and a natural look
The future of colour cosmetics will be connected

CATEGORY DATA

Table 43 - Sales of Colour Cosmetics by Category: Value 2016-2021
Table 44 - Sales of Colour Cosmetics by Category: % Value Growth 2016-2021
Table 45 - NBO Company Shares of Colour Cosmetics: % Value 2017-2021
Table 46 - LBN Brand Shares of Colour Cosmetics: % Value 2018-2021
Table 47 - LBN Brand Shares of Eye Make-up: % Value 2018-2021
Table 48 - LBN Brand Shares of Facial Make-up: % Value 2018-2021
Table 49 - LBN Brand Shares of Lip Products: % Value 2018-2021
Table 50 - LBN Brand Shares of Nail Products: % Value 2018-2021
Table 51 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2018-2021
Table 52 - Forecast Sales of Colour Cosmetics by Category: Value 2021-2026
Table 53 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2021-2026

Deodorants in the United Kingdom

KEY DATA FINDINGS

2021 DEVELOPMENTS

Recovery of deodorants hurt by the impact of COVID-19 restrictions
Lynx undergoes a rebrand to keep up with current market trends
Location of purchases of deodorants impacted by COVID-19 restrictions

PROSPECTS AND OPPORTUNITIES

Subscription services and refills set to be popular
Slow recovery in sales of deodorants, with sprays remaining the largest category
Natural deodorants will continue to be sought by UK consumers

CATEGORY DATA

Table 54 - Sales of Deodorants by Category: Value 2016-2021

Table 55 - Sales of Deodorants by Category: % Value Growth 2016-2021

Table 56 - Sales of Deodorants by Premium vs Mass: % Value 2016-2021

Table 57 - NBO Company Shares of Deodorants: % Value 2017-2021

Table 58 - LBN Brand Shares of Deodorants: % Value 2018-2021

Table 59 - Forecast Sales of Deodorants by Category: Value 2021-2026

Table 60 - Forecast Sales of Deodorants by Category: % Value Growth 2021-2026

Table 61 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2021-2026

Depilatories in the United Kingdom

KEY DATA FINDINGS

2021 DEVELOPMENTS

Sales of depilatories continue to fall despite the impact of lockdown restrictions

Subscription services for razors increase in popularity during 2021

Laser hair removal becoming more popular as an at-home option

PROSPECTS AND OPPORTUNITIES

Continued decline expected in the forecast period as consumer preferences shift away from depilatories

Importance of sustainability will remain critical

Growth of dermaplaning fits trend for skiminalism

CATEGORY DATA

Table 62 - Sales of Depilatories by Category: Value 2016-2021

Table 63 - Sales of Depilatories by Category: % Value Growth 2016-2021

Table 64 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2017-2021

Table 65 - NBO Company Shares of Depilatories: % Value 2017-2021

Table 66 - LBN Brand Shares of Depilatories: % Value 2018-2021

Table 67 - Forecast Sales of Depilatories by Category: Value 2021-2026

Table 68 - Forecast Sales of Depilatories by Category: % Value Growth 2021-2026

Fragrances in the United Kingdom

KEY DATA FINDINGS

2021 DEVELOPMENTS

Premium fragrances sees double-digit value growth in 2021, but lower sales than 2019

Mass fragrances continues to suffer in 2021

Stronger e-commerce paves the way for digital innovations

PROSPECTS AND OPPORTUNITIES

Premium fragrances will continue to see growth in the forecast period

Mass fragrances likely to continue to experience declining sales

Demand for transparent and sustainable brands will become the norm across fragrances

CATEGORY DATA

Table 69 - Sales of Fragrances by Category: Value 2016-2021

Table 70 - Sales of Fragrances by Category: % Value Growth 2016-2021

Table 71 - NBO Company Shares of Fragrances: % Value 2017-2021

Table 72 - LBN Brand Shares of Fragrances: % Value 2018-2021

Table 73 - LBN Brand Shares of Premium Men's Fragrances: % Value 2018-2021

Table 74 - LBN Brand Shares of Premium Women's Fragrances: % Value 2018-2021

Table 75 - Forecast Sales of Fragrances by Category: Value 2021-2026

Table 76 - Forecast Sales of Fragrances by Category: % Value Growth 2021-2026

Hair Care in the United Kingdom

KEY DATA FINDINGS

2021 DEVELOPMENTS

Colourants declines while salon professional hair care continues to thrive

Brands cater to natural hair colours and styles

Hair health drives growth

PROSPECTS AND OPPORTUNITIES

Mainstay mass brands adopt premium features

Ayurveda, emotional connection and fragrance to drive growth

E-commerce boom challenges mainstay players

CATEGORY DATA

Table 77 - Sales of Hair Care by Category: Value 2016-2021

Table 78 - Sales of Hair Care by Category: % Value Growth 2016-2021

Table 79 - Sales of Hair Care by Premium vs Mass: % Value 2016-2021

Table 80 - NBO Company Shares of Hair Care: % Value 2017-2021

Table 81 - NBO Company Shares of Salon Professional Hair Care: % Value 2017-2021

Table 82 - LBN Brand Shares of Hair Care: % Value 2018-2021

Table 83 - LBN Brand Shares of Colourants: % Value 2018-2021

Table 84 - LBN Brand Shares of Salon Professional Hair Care: % Value 2018-2021

Table 85 - LBN Brand Shares of Styling Agents: % Value 2018-2021

Table 86 - LBN Brand Shares of Premium Hair Care: % Value 2018-2021

Table 87 - Forecast Sales of Hair Care by Category: Value 2021-2026

Table 88 - Forecast Sales of Hair Care by Category: % Value Growth 2021-2026

Table 89 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2021-2026

Men's Grooming in the United Kingdom

KEY DATA FINDINGS

2021 DEVELOPMENTS

Some recovery of hygiene habits as a degree of normality returns to life in the UK

Variations in the performances of different men's grooming categories

Inclusivity becoming more pronounced in men's grooming

PROSPECTS AND OPPORTUNITIES

All categories except men's shaving forecast to see recovery in the next five years

Demand for grooming will increase, but promotional triggers will remain important

Sustainability and environmentally-friendly products will remain essential

CATEGORY DATA

Table 90 - Sales of Men's Grooming by Category: Value 2016-2021

Table 91 - Sales of Men's Grooming by Category: % Value Growth 2016-2021

Table 92 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2018-2021

Table 93 - Sales of Men's Skin Care by Type: % Value Breakdown 2018-2021

Table 94 - NBO Company Shares of Men's Grooming: % Value 2017-2021

Table 95 - LBN Brand Shares of Men's Grooming: % Value 2018-2021

Table 96 - LBN Brand Shares of Men's Razors and Blades: % Value 2018-2021

Table 97 - Forecast Sales of Men's Grooming by Category: Value 2021-2026

Table 98 - Forecast Sales of Men's Grooming by Category: % Value Growth 2021-2026

Oral Care in the United Kingdom

KEY DATA FINDINGS

2021 DEVELOPMENTS

Mouthwashes/dental rinses continues its ascent in 2021

Toothpaste continues to see the rise of premiumisation

Manual toothbrushes continues to lose ground in 2021

PROSPECTS AND OPPORTUNITIES

Power toothbrushes and replacement heads will see higher sales

Sales of toothpaste, tooth whiteners and mouthwashes set to increase

E-commerce and discounters will drive distribution growth

CATEGORY DATA

Table 99 - Sales of Oral Care by Category: Value 2016-2021

Table 100 - Sales of Oral Care by Category: % Value Growth 2016-2021

Table 101 - Sales of Toothbrushes by Category: Value 2016-2021

Table 102 - Sales of Toothbrushes by Category: % Value Growth 2016-2021

Table 103 - Sales of Toothpaste by Type: % Value Breakdown 2017-2021

Table 104 - NBO Company Shares of Oral Care: % Value 2017-2021

Table 105 - LBN Brand Shares of Oral Care: % Value 2018-2021

Table 106 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2018-2021

Table 107 - LBN Brand Shares of Toothpaste: % Value 2018-2021

Table 108 - Forecast Sales of Oral Care by Category: Value 2021-2026

Table 109 - Forecast Sales of Oral Care by Category: % Value Growth 2021-2026

Table 110 - Forecast Sales of Toothbrushes by Category: Value 2021-2026

Table 111 - Forecast Sales of Toothbrushes by Category: % Value Growth 2021-2026

Skin Care in the United Kingdom

KEY DATA FINDINGS

2021 DEVELOPMENTS

2021 sees skin care recover

Acne launches define 2021

Indie brands continue to erode shares of top players

PROSPECTS AND OPPORTUNITIES

Hybridity sees colour cosmetics compete with skin care

Sustainability returns to the fore

Luxury department stores and pop-ups lean on their experience

CATEGORY DATA

Table 112 - Sales of Skin Care by Category: Value 2016-2021

Table 113 - Sales of Skin Care by Category: % Value Growth 2016-2021

Table 114 - NBO Company Shares of Skin Care: % Value 2017-2021

Table 115 - LBN Brand Shares of Skin Care: % Value 2018-2021

Table 116 - LBN Brand Shares of Basic Moisturisers: % Value 2018-2021

Table 117 - LBN Brand Shares of Anti-agers: % Value 2018-2021

Table 118 - LBN Brand Shares of Firming/Anti-cellulite Body Care: % Value 2018-2021

Table 119 - LBN Brand Shares of General Purpose Body Care: % Value 2018-2021

Table 120 - LBN Brand Shares of Premium Skin Care: % Value 2018-2021

Table 121 - Forecast Sales of Skin Care by Category: Value 2021-2026

Table 122 - Forecast Sales of Skin Care by Category: % Value Growth 2021-2026

Sun Care in the United Kingdom

KEY DATA FINDINGS

2021 DEVELOPMENTS

Sun care witnesses a recovery in sales in 2021

The trend towards premiumisation continues

Negative reports over product quality highlight the importance of quality

PROSPECTS AND OPPORTUNITIES

Recovery to pre-pandemic levels will be seen

Importance attached to sustainable products will increase

Skinimalism and personalisation will impact sun care

CATEGORY DATA

Table 123 - Sales of Sun Care by Category: Value 2016-2021

Table 124 - Sales of Sun Care by Category: % Value Growth 2016-2021

Table 125 - NBO Company Shares of Sun Care: % Value 2017-2021

Table 126 - LBN Brand Shares of Sun Care: % Value 2018-2021

Table 127 - LBN Brand Shares of Premium Adult Sun Care: % Value 2018-2021

Table 128 - Forecast Sales of Sun Care by Category: Value 2021-2026

Table 129 - Forecast Sales of Sun Care by Category: % Value Growth 2021-2026

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 focussing 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.