

## January 2023

### Suncare - UK

"Value sales of suncare products in 2022 continued to increase, surpassing pre-pandemic levels as a result of eased international travel restrictions post COVID-19 and the 2022 heatwave. The consumer's heightened focus on skin health is making suncare an increasingly essential step in beauty/grooming routines. While consumers continue to opt ...

## December 2022

### Deodorants - UK

"The deodorant category will be defined by savvy shopping behaviours in upcoming years and brands will need to propose value in order to retain their share of the market. Appealing with money-saving multipacks and remaining competitive with special offers will benefit deodorant brands. However, value encompasses more than cost and ...

## November 2022

### Beauty Online - UK

"Despite a decline in sales, the value of the online BPC market is not set to return to pre-pandemic levels in 2022. As many consumers cut back on spend amidst the rising cost of living, there is an opportunity for brands and retailers to emphasise the price comparison abilities of ...

## September 2022

### The Prestige Beauty Consumer - UK

"A combination of post COVID-19 recovery and rising prices due to inflation will boost the prestige BPC segment in 2022. However, a challenging economic environment will see consumers seeking out discounted products, or adopting trade-down behaviours. There is opportunity for prestige brands to instil purchase confidence through proving claims and ...

### Colour Cosmetics - UK

"Following COVID-19, women have adopted streamlined makeup routines. However, as social occasions resume and consumers return to offices, occasions for makeup-wearing become more frequent and spend is recovering. While the cost of living crisis might hinder spending, the makeup category will have a role to play in consumers' lives as ...

## August 2022

## Beauty and Personal Care - UK

### Fragrances - UK

“Post-pandemic recovery and inflation will support value growth in fragrance in 2022. A reluctance to trade down will support the prestige segment, as many look to treat themselves with affordable luxuries during times of economic uncertainty. A willingness to spend signals opportunity for innovation in personalised fragrance, which is a ...

### Natural and Organic Toiletries - UK

“While value sales of organic health and beauty products have continued to rise, inflation and the growing importance of sustainability could threaten demand for natural/organic BPC going forward. As price sensitivities grow, value-focussed NPD can dissuade consumers from moving away from natural/organic BPC. Meanwhile, science will play an ...

### Hand, Body and Footcare - UK

“The rising cost of living will come to define consumer spending on hand, body and footcare. However, in a crowded category where value is defined as more than product cost, brands can propose value with ingredients, wellbeing claims and skin expertise to dissuade trading down and drive usage. In innovation ...

## June 2022

### Women's Facial Skincare - UK

“Value growth in women’s facial skincare will be largely driven by inflation in 2022, and the comparison capabilities of the online channel will facilitate savvy shopping habits, exacerbating challenges around value growth in the category. To offset this, brands can look to prove product claims in order to instil purchase ...

### Oral Care - UK

“The oral care market has risen in value for the first time since 2016 and consumers are taking a renewed interest in their oral health, seeing it as part of their general wellbeing. Although the cost of living crisis will encourage savvy shopping behaviours among some consumers, the infrequency of ...

## May 2022

### Gifting in BPC - UK

“The cost of living crisis will see a sharper focus on savvy shopping habits. A desire to stockpile will create demand for perennial presents that are not adorned with seasonal imagery. Anxiety triggered by a forecast recession may also help to de-seasonalise the market, particularly if brands can encourage self-gifting ...

### Beauty Influencers and Educators - UK

“An income squeeze will accentuate the role of pre-purchase research, and create opportunities for services that offer advice around value alternatives to prestige products. Trust in sources of beauty/grooming advice is evolving as medical professionals gain a greater voice. Moving forward, the store will remain an important touchpoint, but ...

### Intimate Hygiene and Sanitary Protection Products - UK

“The sanitary protection segment of the market continues to struggle to grow its value, although an

ageing population and rise in conditions that have strong risk factors for incontinence look favourable for future incontinence product value sales. The impact of single-use products is increasingly front of mind for retailers and ...

## April 2022

### Men's Haircare and Skincare - UK

“Both men’s skincare and haircare witnessed a slight value decline in 2021, driven by savvy shopping behaviours caused by concerns around rising inflation. More effective positioning of products will help to drive usage, for example, better alignment between prevalent skin concerns and specialist formats will shift males away from usage ...

### Sustainability in Beauty & Personal Care - UK

“Although consumer awareness of environmental issues is a cause of anxiety, the proportion buying eco-friendly BPC products has not changed significantly in recent years. Consumer confusion and cynicism around green claims underpin this, highlighting the need for universal industry standards and regulation around eco claims, particularly as many also defer ...

### Babies' and Children's Personal Care, Nappies and Wipes - UK

“The effects of strict hygiene practises have put a focus on skin health, resulting in value growth for baby moisturisers, and a demand for specialised and personalised products. As the rising cost of living stretches families’ budgets, brands will benefit from value positioning. However, value positioning can go beyond price ...

### Consumers and the Economic Outlook Q1 - UK

“Even before the conflict in Ukraine, inflation had become the biggest concern for consumers, brands and the British economy for 2022. Households are set to endure the biggest squeeze on real incomes in decades, and the conflict in Ukraine will only add to existing inflationary pressures. This is seen in ...

## March 2022

### Beauty and Personal Care Retailing - UK

“The cost-of-living squeeze will heighten savvy shopping behaviours when buying beauty and personal care products during 2022. However, price hikes don’t necessarily mean trading down, rather that people will become laser-focussed on value across all price points. Retailers and brands can encourage purchasing by promoting experiences that are good for ...

### Women's Haircare - UK

“Women’s haircare showed strong value growth in 2021, boosted by the styling segment which benefited from the return of social occasions. Hair health priorities will continue to drive a preference for treatment products, while scalp health remains an area of interest. Women show a willingness to trade up in this ...

## February 2022

### Attitudes towards Beauty and Grooming Routines - UK

### Shaving and Hair Removal - UK

## Beauty and Personal Care - UK

“Pent-up demand in Q1 2022 will help drive consumer engagement with beauty/grooming routines, especially for those daily routines which have foundered since the start of the pandemic, notably applying makeup. There are opportunities to further boost consumer engagement with beauty/grooming routines by boldly conveying the confidence-boosting and wellness ...

“COVID-19, coupled with an increasingly casual culture, have deprioritised hair removal. Boredom with the current product offering, alongside consumer expectations of discounting, continue to erode market value for the UK’s shaving and hair removal products. However, growth among newer, fresher brands points to consumer interest in products that offer more ...

### Brand Overview: BPC - UK

“Although consumer concerns around COVID-19 have declined, the ongoing disruption in terms of working habits and travelling occasions means there is a risk of BPC purchase rationalisation. This will benefit mass-market brands with a reputation for accessibility, while the increase in cost of living triggered by rising inflation will put ...

## January 2022

### Hair Colourants - UK

“While hair colourants saw a significant boost in value in 2020, the full reopening of salons saw many switch back to old colouring habits, leaving the category in significant decline in 2021, and forecast to reach pre-pandemic levels by 2022. In order to offset a return to normal habits, consumers ...

### The Private Label Beauty Consumer - UK

“Brexit and the pandemic brought with them uncertainty that saw shoppers adopting a savvier mindset, a trend that existed beforehand and will outrun both. Branded beauty dupes appeal to the consummate bargain hunter, however retailers can do more to drive digital discovery particularly as younger shoppers use social media to ...