

### December 2018

#### The Amazon Effect - US

Amazon is the world's second largest retailer behind Walmart, with \$120 billion in US sales in 2017, up 71% in two years' time. This one company accounts for approximately 40% of total US ecommerce sales. Its membership program, Amazon Prime, surpassed the 100 million member mark globally this year, and ...

#### The Private Label Beauty Consumer - UK

"NPD in the private label beauty sector has seen brands becoming more competitive, resulting in changing consumer perceptions as well as a rise in the purchase of own-label beauty brands. Private label brands are considered as good as – and in some cases better than – regular brands, whilst younger ...

#### Natural and Organic Personal Care Consumer - US

"Natural brands continue to experience growth, albeit in a new direction. Clean beauty is the new green, with consumers looking for beauty products free from specific synthetic ingredients rather than synthetic-free. To expand consumer penetration of these products and advance sales growth, brands are going beyond formulations and making efforts ...

### November 2018

#### Consumers and the Economic Outlook - Quarterly Update - UK

"Financial well-being and confidence was lower in each of the three months to October than we reported throughout the summer months. This matches the stagnant economic performance in August and September. Overall though, most consumers are still getting by, and remain relatively optimistic about their financial future."

– Rich ...

#### The Senior BPC Consumer - UK

#### Seniors and Health - US

"The number of Seniors, adults aged 65+, is on the rise. By 2023, the US population of Seniors will be 61.6 million strong, accounting for 23.2% of the total US population – up from 20.6% in 2018. Today's Seniors express a positive, realistic attitude toward health. Focusing ...

#### Deodorants - UK

"Standing at an estimated £404 million in 2018, the deodorants market decline has been triggered by lack of innovation and engagement. A core message of functionality appeals to a wide range of consumers, but also means mass brands share a very similar image. Changing how efficacy is advertised can create ...

#### The Millennial BPC Consumer - UK

"As the largest generation in the UK, appealing to Millennials is important but challenging. Communication to this group about their appearance should be sensitive and inclusive, as many feel under pressure to keep up with peers. Innovation can be either light-hearted and fun, or reflective of Millennials' changing lifestyles, but ...

"The senior BPC consumer has much the same aspirations to feel confident and look attractive as their younger counterparts, however the desire for age representation suggests that the category is still not catering to their individual needs. Despite the shift in the way ageing is discussed in brand communication, there ...

## October 2018

### Ingredient Trends in Beauty - US

"The beauty market is very diverse with a wide array of product offerings that make one-size-fits-all marketing an impossible task. Ingredients are a way brands work together cross-category, with many brands looking to other segments (ie food, supplements) for inspiration. Specifically, younger women aged 18-24 exhibit heavy involvement in ingredient ...

### Consumers and the Economic Outlook - US

"The economy continues its slow and steady recovery, though economists are hesitant to say that it has officially recovered. While some consumers may be watching economic indicators, many are not, and even those who are may not see the direct effects on their daily lives. Overall, if consumers were already ...

### Beauty Devices, Tools and Accessories - UK

"Although the value of electrical devices and hair appliances has grown to an estimated £834 million in 2018, new multipurpose appliances threaten long-term growth opportunities in this sector. Non-electrical tools retain popularity via design and self-expression, and consumers continue to use a wide range of non-electrical tools. Opportunity lies in ...

## September 2018

### Beauty Retailing - US

"The US beauty industry is expected to garner sales in the range of \$57 billion this year. Common themes and trends across the industry include inclusivity to address America's diversification, clean beauty (products sans suspected toxic ingredients), simplification of beauty

### Skin Protection - US

"Adults recognize that sun exposure has a negative impact on the appearance of their skin, and the majority of adults use sunscreen, tanning products, or sunless tanners. However, the category continues to be challenged by seasonal use. Industry players are further challenged by competing personal care products that offer sun ...

### Marketing to Moms - US

"The competition among brands to get moms' attention is fierce. Only a small share of moms say they have the money to pay for everything their kids want to do, meaning brands have to put in a lot of effort to make it to the top of moms' list. One ...

### Shaving and Hair Removal - UK

"As both genders feel the pressure to be hair-free, facial and body hair removal rates have seen a rise, however, the category continues to show a decline in value with little in NPD encouraging people to trade up. The beard trend shows no evidence of waning in 2018 with the ...

### Vitamins, Minerals and Supplements - US

"The pace of growth for the VMS (vitamins, minerals, and supplements) market remains steady, as sales are estimated to increase by 5.1% in 2018, reaching \$24.5

... routines, the integration of physical and digital channels, personalization in ...

## Shaving and Hair Removal Products - US

"The highly saturated shaving and hair removal products market is estimated to reach \$3.5 billion in total 2018 retail sales, declining by 3.9% from 2017. Although usage of razors is nearly universal, the value-driven nature of the category, shifting expectations of shaving and hair removal, and increased competition ...

## Black Haircare - US

"The Black haircare market has adjusted to the new natural hair normal. Product innovation, expanded retail distribution, and brand messaging recognize that the future of the Black haircare market is dependent on chemical-free consumers. While natural hair is the norm, Black consumers have different attitudes, beauty standards, and motivations behind ...

## Salon Services - US

"While routine maintenance is a top reason for seeking salon services, resulting in many being loyal to the same destinations and professionals, other reasons for receiving services exist. The desire to pamper or seek services for social activities could motivate some consumers to consider alternative destinations, such as at-home treatments ...

## August 2018

## Luxury Goods Retail - International

"The global luxury goods industry is going through a significant period of change. As young consumers are fast becoming key purchasers of high-end fashion, luxury houses need to adapt. This has resulted in polarised performances amongst the leading players. Those that were slower to respond have lost market share, whilst ...

## Bodycare and Deodorant - US

## Beauty and Personal Care - International

... billion. Yet consumer emphasis on value and lack of product understanding are a challenge to the category. To best position themselves, category ...

## Vitamins and Supplements - UK

"The ongoing consumer focus on health and the continued success of demographic-specific supplements have supported growth in the vitamins and supplements category. However, with the majority of adults questioning the health promises made, improving trust is needed if the category is to grow its market penetration. Meanwhile, personalised subscriptions could ...

## Fragrances - US

"After several years of lackluster sales performance, the US fragrance market continues to see sales slip. Cross-category competition and disengagement among key demographics have hindered category growth. In spite of category challenges, there are pockets of growth in e-commerce fragrance brands, customized fragrance, and aromatherapy."

## Consumers and the Economic Outlook - Quarterly Update - UK

"Consumers continue to worry about the impact Brexit will have on the UK economy. But people are still focussing much more on their own financial situations, which are currently in a pretty healthy state. The base rate rise will make it harder for some, but the general outlook is positive ...

## Fragrances - UK

## Beauty and Personal Care - International

"The body care and deodorant industry continues to see slow yet steady sales growth in 2018, with future trends projected to remain comparable. Deodorant brands that focus on scent, natural ingredients, and practical claims such as staining or white marks will continue to see success. Body care brands that pique ...

"Women's body sprays have triggered the most recent market growth. A new wave of feminism has challenged traditional marketing, and unisex fragrances are a growing trend. A need for natural ingredients has given niche brands the lead, while large manufacturers get left behind. Body spray could be key for luxury ...

### Beauty Influencers and Educators - UK

"Traditional experts such as in-store counter staff, make-up artists and dermatologists are the most trusted sources of information in BPC, suggesting that brands can do more to reassert the position of traditional experts. Social media influencers remain important, particularly to young women, however BPC shoppers are showing scepticism towards them ...

## July 2018

### Medicated Skincare - US

"The medicated skincare market grew by 0.4% in 2017 and will reach an estimated \$1.1 billion in 2018; an increase of just \$14 million. Through 2023, Mintel estimates that the market will add between 1% and 3% per annum. Better prevention, oral medications, and non-medicated products will continue ...

### Consumers and the Economic Outlook - US

"Consumers remain confident in their financial health and anticipate little change in the coming year, resulting in stable patterns of financial opinions and behaviors. Consumers hope to save for the future while also maintaining spending levels that accommodate their current lifestyle. This Report looks at the role credit score plays ...

### Oral Care - UK

"In a sector where growth has ground to a halt, and is expected to remain flat for some time, oral care brands need to engage consumers more with their dental health and reduce reliance on special offers if they are to see value return. More standardised help and guidance in ...

### Color Cosmetics - US

"Despite a slowdown, color cosmetics continues to post growth, with facial cosmetics still commanding the highest consumer spend. The popularity of the no-makeup look continues to be on-trend, with consumers seeking skincare-based formulas to boost radiance. Lastly, Black women are a key market, as the inclusivity movement encourages product trial ...

### Men's Facial Skincare - UK

"The market decline continues as men shrink their skincare regimes. While they look to brands they know to give them affordable options and educate them, big manufacturers are concentrated elsewhere – leaving smaller male-specific brands room to flourish. The advertising narrative needs to appeal to new priorities among men, while ...

## June 2018

### Women's Facial Skincare - UK

"The women's facial skincare category has seen strong value growth year-on year despite a decline in NPDP, suggesting that advertising and marketing messages are resonating with women. Penetration of products has increased in the last 12 months, indicating that women are adding multiple steps to their regime. However, there are ...

### Consumers and the Economic Outlook - Quarterly Update - UK

"The increase in confidence that we discussed in Consumers and the Economic Outlook – UK – March 2018 clearly wasn't a one-off. Our confidence data has been running for almost a decade now, and people's assessments, both of their current financial situation and how they expect their finances to shape ...

### Personalisation in Beauty - UK

"The concept of personalisation in beauty is far from saturation. With consumers often unsure of their requirements, brands can be a source of inspiration or offer suggestions and assistance via their customisation options. Many demographics remain underserved by personalisation services, as well as those who require more tailored ingredients. However ...

## May 2018

### Facial Skincare and Anti-aging - US

"The facial skincare and anti-aging market has grown a modest 5% between 2012-17, driven by gains in the facial cleanser and facial moisturizer segments. Consumer demand for multi-benefit products is hurting growth of specialty skincare treatments, and an emphasis on natural, effective ingredients could be a challenge to mature, established ...

### Footcare - US

"Footcare industry sales are projected to dip. The industry is slowly stabilizing after a sharp sales increase in 2015 was followed immediately by steep declines, a

### OTC Analgesics and Cold and Flu Remedies - UK

"The British population is facing a health crisis – it is getting older, more overweight and a growing culture of 'presenteeism' is resulting in many employees placing additional stress and strain on their bodies when rest and recuperation is what's needed. The OTC analgesics and cold and flu remedies market ...

### Oral Health - US

"Oral care sales generated \$8 billion in 2017, a modest 0.6% increase from 2016 driven by slowed growth in the toothpaste and mouthwash segments. Oral hygiene routines remain unchanged for most consumers, but around one fifth are working to improve their regimens. While they are relatively minimal, some frustrations ...

### Marketing to Millennials - US

Millennials are the largest generational group in the US and as they age they are only becoming a more important part of the consumer economy. Millennials are growing their incomes and entering new markets as they buy homes and start families. Marketers interested in reaching this group will need to ...

### Marketing Health to Millennials - US

The Millennial generation is aged 24-41 in 2018, with many in the midst of major life milestones. As this generation balances a busy lifestyle they focus on the small steps they can take to manage their wellbeing. For Millennials, health and wellness is essentially a means to looking better and ...

### Colour Cosmetics - UK

"The colour cosmetics category continued to show strong sales performance in 2017, with the mass-market and prestige sectors both faring well. Women's buying

## Beauty and Personal Care - International

result of a foot smoothing device fad. Foot pain and aesthetic issues are fairly common, driving footcare product usage. Consumers prioritize functionality over brand ...

behaviours show an increase in the purchase of lip gloss and liquid foundations, driven by NPD and beauty trends. With high interest in technology aiding the shopping ...

### Marketing to the iGeneration - US

Aged 11-23 in 2018, the iGeneration is the generational group that follows Millennials. Also referred to as Gen Z, to Millennials' Gen Y, the iGeneration is starting to take Millennials' place in the desirable 18-34 demographic, and marketers are investing in building relationships with this group. In some senses, iGens ...

## April 2018

### Hair Colourants - UK

"The future growth of the colourants market may be limited as the relevance of the market changes. Rather than appealing to older consumers through affordability, appealing to younger consumers is increasingly important. Providing accompanying haircare and gradual or personalised colour solutions are key to brand success, as well as embracing ...

### Shampoo, Conditioner and Hairstyling Products - US

"The shampoo, conditioner, and hairstyling products market continues to post slow but steady growth, driven by gains in the shampoo segment and a stabilizing conditioner segment, buffering struggling sales of hairspray and hairstyling products. Damage concerns and preferences for natural hair looks have some consumers skipping daily washing in lieu ...

### Feminine Hygiene and Sanitary Protection Products - US

"The feminine care market is moving further towards a competitive imbalance, with P&G becoming more dominant and private label encroaching on the position of smaller players. A rapidly aging consumer base makes growth a challenge; but there are opportunities. Natural products, improving consumer brand involvement, and durable sanitary protection suggest ...

### Consumers and the Economic Outlook - US

"The US economy weathered the political tumult of 2017 with surprising vigor, as most major economic indicators fared increasingly better throughout the year. The nation's GDP (gross domestic product) has been on the rise for 17 consecutive quarters, and consumer confidence has been marching forward at record levels, while unemployment ...

### Hand, Body and Footcare - UK

"The hand, body and footcare category showed modest growth in value in 2017, with the value of the premium segment growing at a greater rate than mass-market. Whilst the majority of people show an understanding of body skin being as important as facial skin, consumers are blurring the boundaries when ...

### Cough, Cold, Flu and Allergy Remedies - US

Total sales for the cough, cold, flu, and allergy remedy market reached \$9.5 billion in 2017, a 6.2% increase from 2016. The start to a record-breaking flu season has already driven an 8.7% increase in the cold and sinus remedies segment, fueled by sales of flagship, multi-functional ...

## March 2018

## Consumers and the Economic Outlook - Quarterly Update - UK

"People are still wary about the potential impact of Brexit – particularly when it comes to the cost of living. But people seem able to separate these macro-economic concerns from their own personal financial situation. Unemployment remains at record lows, and while average wages are still increasingly more slowly than ...

## Women's Haircare - UK

"Growth in the women's haircare market has been driven by a continued focus on caring needs, especially driven by conditioning treatments. However, as mass brands develop their own versions of salon regimes, prestige brands will need to prove their worth to remain relevant. Regardless of price point, winning brands have ...

## Disposable Baby Products - US

"Declining birthrates and budget conscious parents have challenged growth in the disposable baby products market. Parents are unified in their views that safe product ingredients come first – or at least the safest option within their budget. Looking forward, parents' need for durable products is not expected to change, and ...

## February 2018

## Drug Store Retailing - US

"A combination of an aging population and favorable market factors is expected to result in positive growth for the drug store market. However, a number of issues, such as consumers' low loyalty and desire for deals, combined with an increasingly competitive landscape will continue to pose challenges for traditional drug ...

## Soap, Bath and Shower Products - US

"The soap, bath, and shower products market continues to experience slow, yet steady growth, benefiting from strong liquid body wash sales that are compensating for struggles in the bar soap segment. The inclusion of premium and therapeutic benefits has also helped boost sales of liquid body wash and bath products ...

## The iGen Beauty Consumer - US

"The iGeneration is made up of four segments: tweens, younger teens, older teens, and adults. This diverse age range can be a challenge for brands as some iGens rely completely on their parents, while others have independent spending power. Regardless of age, iGens are generally more engaged and socially conscious ...

## Black Beauty Consumer - US

Black women are less likely to use cosmetics in comparison to the general market, but her usage varies across beauty products due to her skill set, her knowledge of expected benefits, and most importantly, her ability to find products in the right shades to create her desired look. Her beauty ...

## Children and Health - US

"Illness is prevalent among children, as 97% of children younger than 12 experienced some type of illness symptom in the past year. Their weaker immune system combined with opportunities for interaction and germ spreading makes them especially susceptible to illness. The OTC (over-the-counter) children's health products market has continued to ...

## The Beauty Consumer - US

The beauty category has continued to grow through 2017, with the highest growth coming from beauty devices. Women are minimizing their daily beauty routines and are searching for products that can do it all in the least amount of time. Going forward, women will continue to demand customized products to ...



## Beauty and Personal Care - International

### Attitudes towards Cosmetic Procedures - UK

"Brits are generally happy with their appearance, presenting a crucial challenge for an industry that is centred on helping people to change how they look. However, there is scope for operators in the cosmetic procedures market to appeal to a wider audience by moving away from the current association with ...

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

"Market decline continues to show the need for brands to differentiate versus own-label. This is easier in some sectors where parents seek specific claims, but mass disposable nappy brands will either need to premiumise further or devolve and compete on price. The overarching need for convenience in all sectors remains ...

**January 2018**

### Consumers and the Economic Outlook - US

"Economic improvement continued at a relatively steady clip as a new presidential administration took office at the beginning of the year. While there have been natural catastrophes and tragedies throughout the US, the economy has generally remained stable and any expert predictions continue to be optimistic."

- Jennifer White Boehm, Associate ...

### Brand Overview: BPC - UK

"The advancement of technology in the BPC sector means that brands are under more pressure to help consumers test, design and buy products on their own terms. Soon, the prospect of buying an off-the-shelf, one-size-fits-all product may become unpalatable to the most heavily engaged consumers, while even mainstream shoppers will ...

### Beauty and Personal Care Retailing - UK

"The UK beauty and personal care market remains challenging, as weak growth in personal care continues to hinder growth in the wider market. Meanwhile, the beauty segment is driving the market, boosted by make-up and skincare trends. Many of the health and beauty specialists have reacted to these trends and ...

### Beauty and Personal Care Retailing - Italy

"Although the Italian BPC market remains fragmented, there is ongoing consolidation in the market as a number of the leading specialists strengthen their position. As the economy continues to recover, there will be new opportunities for retailers to capture increased spending on beauty and personal care. Having a differentiated offer ...

### Beauty and Personal Care Retailing - Spain

"As the Spanish political situation becomes more uncertain with lower rates of economic growth forecast for 2018, beauty specialists will need to work harder to compete with the growing force of supermarkets and fashion retailers that are grabbing share of the beauty market. They need to focus on improving the ...

### Beauty and Personal Care Retailing - Germany

"There is growing pressure on the market leaders in beauty and personal care retailing in Germany. Online is growing, with Amazon an increasingly important player. There are newcomers in the specialist cosmetics and perfumery sectors. We think that some of the market leaders are already showing signs of this increased ...

### Beauty and Personal Care Retailing - France

### Beauty and Personal Care Retailing - Europe



## Beauty and Personal Care - International

“French specialist beauty and personal care retailers are doing well, increasing their share of a sluggish market. Sephora leads by some margin, but Nocibé, now under the Douglas umbrella, is doing well and Kiko Milano is expanding rapidly. With 30% of female BPC buyers having shopped online, and 47% often ...

### Gifts in Beauty and Personal Care - UK

“New product development in BPC gift sets has declined in recent years, with consumers showing a preference for individual products. This may be partly driven by a desire to reduce waste, which extends to packaging. Mintel’s research shows high consumer interest in functional as well as reduced packaging. Women remain ...

### Feminine Hygiene and Sanitary Protection Products - UK

“There is a quiet revolution ongoing in the incontinence products segment. The stigma around incontinence appears to be fading, products are advertised on primetime TV, and brands are creating new designs that are more stylish and sophisticated. As the population ages, incontinence products are only going to go even more ...

“Retailing of beauty and personal care products is poised for change. It looks as if the mass market drugstores are approaching maturity in some countries while the retailers with the greatest potential are those with innovative own brands. But specialists who can provide the right environment plus a range of ...

### Managing Your Health - US

Consumers and brands alike are talking about wellness in the face of an uncertain healthcare market and growing health issues. To bring down healthcare expenses, health management is increasingly placed in the hands of consumers who are turning to a variety of sources to improve their wellbeing and receive guidance ...

### Nail Color and Care - US

The nail care and color market has declined since 2014, with substantial losses in the key segment, nail color. While category engagement is struggling as a whole, consumer concern around the damage of frequent polishing and growing interest in ingredient formulations is evident in the success of artificial nails and ...