



Passport

Beauty and Personal Care in the US

Euromonitor International

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Some content and data have been changed.

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BEAUTY AND PERSONAL CARE IN THE US - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Beauty and personal care in 2021: The big picture

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2021 key trends

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Competitive landscape

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Retailing developments

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What next for beauty and personal care?

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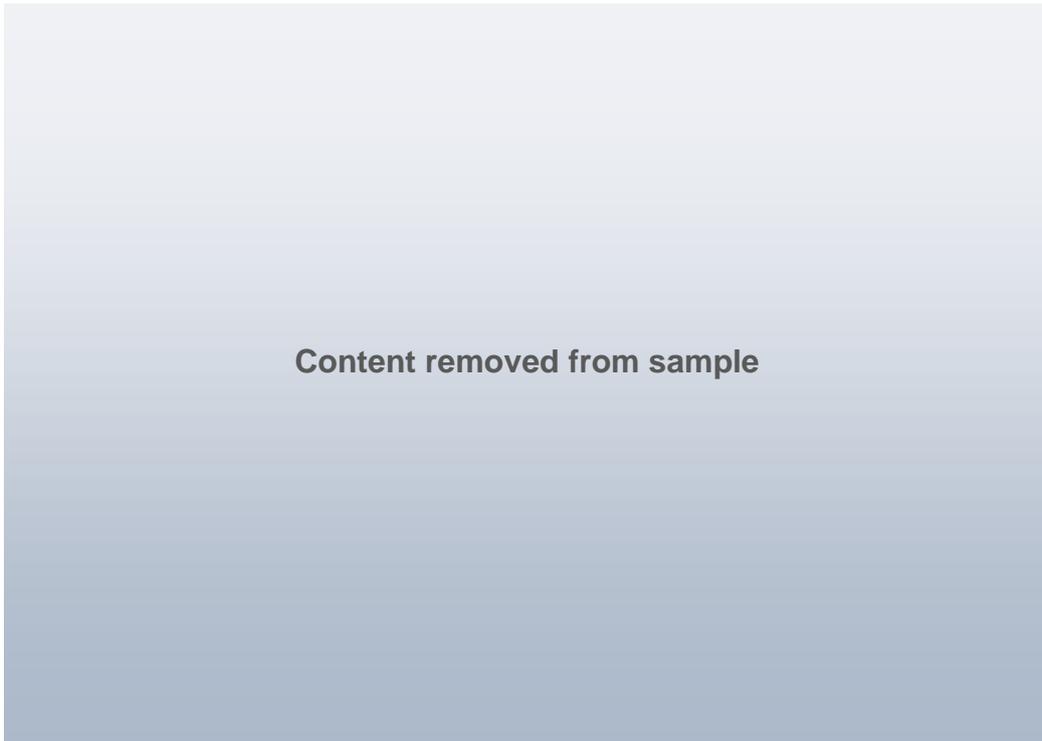


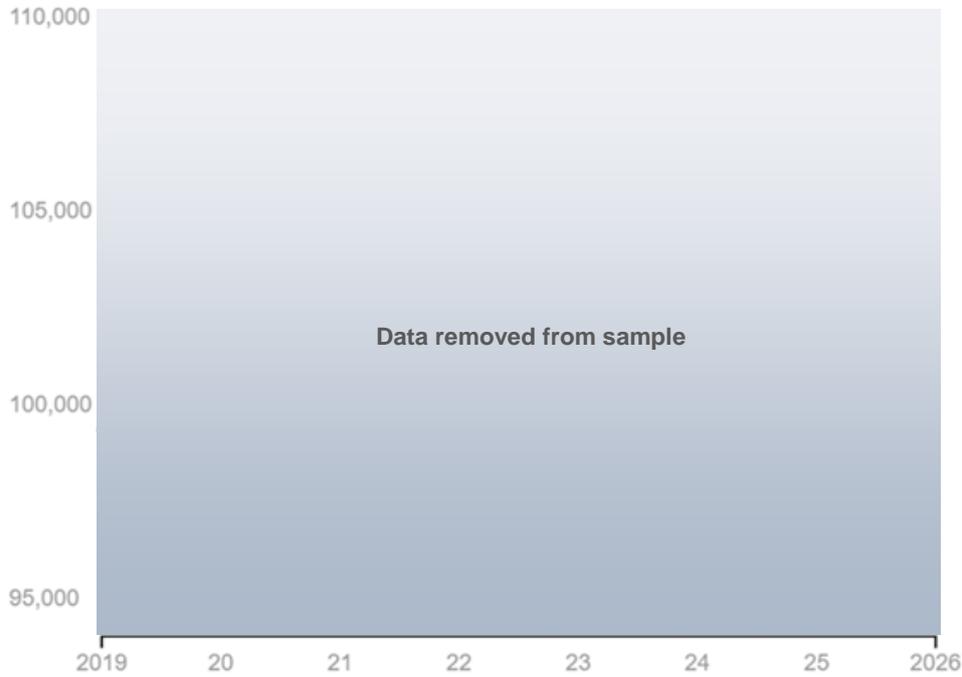
Chart 1 Beauty and Personal Care Value Sales Growth Scenarios: 2019-2026

Retail Value Sales, Real, US\$ mn, 2019 - 2026

2021 Constant Prices, 2021 Fixed Year Exchange Rate

Beauty and Personal Care - USA

Passport Baseline C19 Pessimistic



Source: Euromonitor International

Note: C19 Pessimistic 1 represents a modelled scenario with an estimated probability of 25-35% over a 1-year horizon, factoring in macro drivers including GDP, stock prices, business and consumer confidence rates alongside infection rates, supply chain and labour supply disruption rates

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

Retail Value Sales, Real US\$ mn 2019 - 2026

2021 Constant Prices, 2021 Fixed Year Exchange Rate

USA - Beauty and Personal Care

Retail Value Sales, Real Growth

○ Passport Baseline

Driver effects

■ GDP Per Capita

■ Product Price

■ Habit Persistence

■ Population

■ Substitutes Price

- (2-in-1 Products; Adult Sun Care; Aftersun; Bar Soap; Basic Moisturisers; Battery Toothbrushes; Blusher/Bronzer/Highlighter; Body Wash/Shower Gel; Deodorant Pumps; Deodorant Roll-Ons; Deodorant Sticks; Electric Toothbrush Units; Electric Toothbrushes; Eye Make-Up; Firming/Anti-Cellulite Body Care; Foundation/Concealer; General Purpose Body Care; Lip Gloss; Lipstick; Liquid Soap; Liquid/Cream/Gel/Bar Cleansers; Mascara; Mass BB/CC Creams; Mass Fragrance Sets/Kits; Mass General Purpose Body Care; Mass Liquid/Cream/Gel/Bar Cleansers; Mass Men's Fragrances; Mass Nail Treatments/Strengthener; Mass Other Facial Make-Up; Mass Sun Protection; Mass Unisex Fragrances; Mass Women's Fragrances; Mouth Fresheners; Mouthwashes/Dental Rinses; Nail Treatments/Strengthener; Other Facial Make-Up; Other Lash and Brow Make-Up; Other Lip Products; Other Nail Products; Premium Basic Moisturisers; Premium Eye Shadow; Premium Face Masks; Premium Fragrance Sets/Kits; Premium Hand Care; Premium Lip Gloss; Premium Liquid/Cream/Gel/Bar Cleansers; Premium Mascara; Premium Men's Fragrances; Premium Other Facial Make-Up; Premium Other Lash and Brow Make-Up; Premium Unisex Fragrances; Premium Women's Fragrances; Shampoos; Standard Toothbrushes)

■ **Socio-Economic Trends**

- (Employment Rate; Female Employment Rate)

■ **Soft Drivers**

- (- Competition; - Consumer awareness; - Lifestyle trends; + Product variety; + Promotion)



Source: Euromonitor International

Note: The above chart shows the growth decomposition split by macro drivers such as GDP per capita and population alongside soft drivers listed as having a positive (+) or negative (-) impact on the total growth rate

MARKET DATA

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

USD million	2016	2017	2018	2019	2020	2021
Baby and Child-specific Products	Data removed from sample					
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Oral Care Excl Power Toothbrushes						
Skin Care						
Sun Care						
Premium Beauty and Personal Care						
Prestige Beauty and Personal Care						
Mass Beauty and Personal Care						
Dermocosmetics Beauty and Personal Care						
Beauty and Personal Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, and baby and child-specific sun care categories

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

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Baby and Child-specific Products	Data removed from sample		
Bath and Shower			
Colour Cosmetics			
Deodorants			
Depilatories			
Fragrances			
Hair Care			
Men's Grooming			
Oral Care			
Oral Care Excl Power Toothbrushes			
Skin Care			
Sun Care			
Premium Beauty and Personal Care			
Prestige Beauty and Personal Care			
Mass Beauty and Personal Care			

Dermocosmetics Beauty and Personal Care
Beauty and Personal Care

Data removed from sample

- Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
- Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care
- Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, and baby and child-specific sun care categories

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

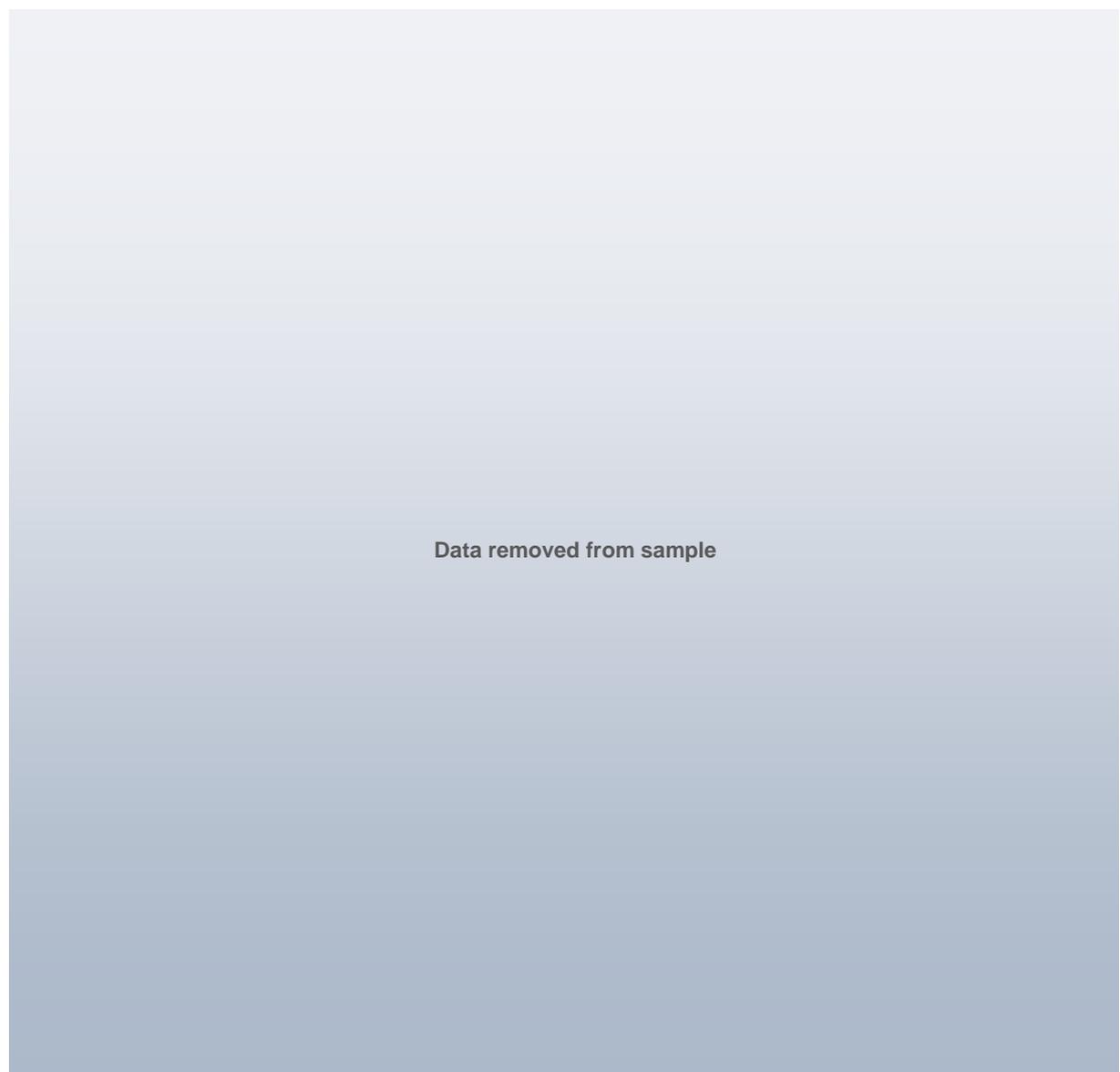
% retail value rsp Company	2017	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

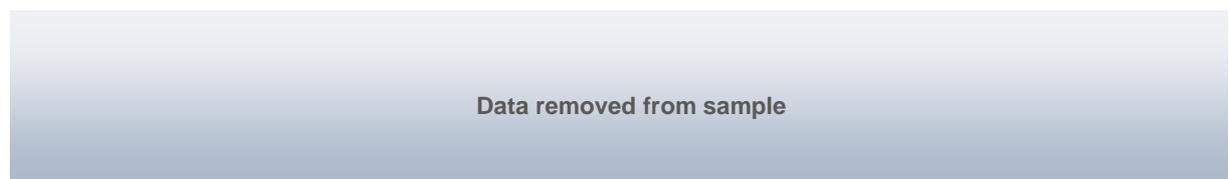
% retail value rsp Company	2017	2018	2019	2020	2021
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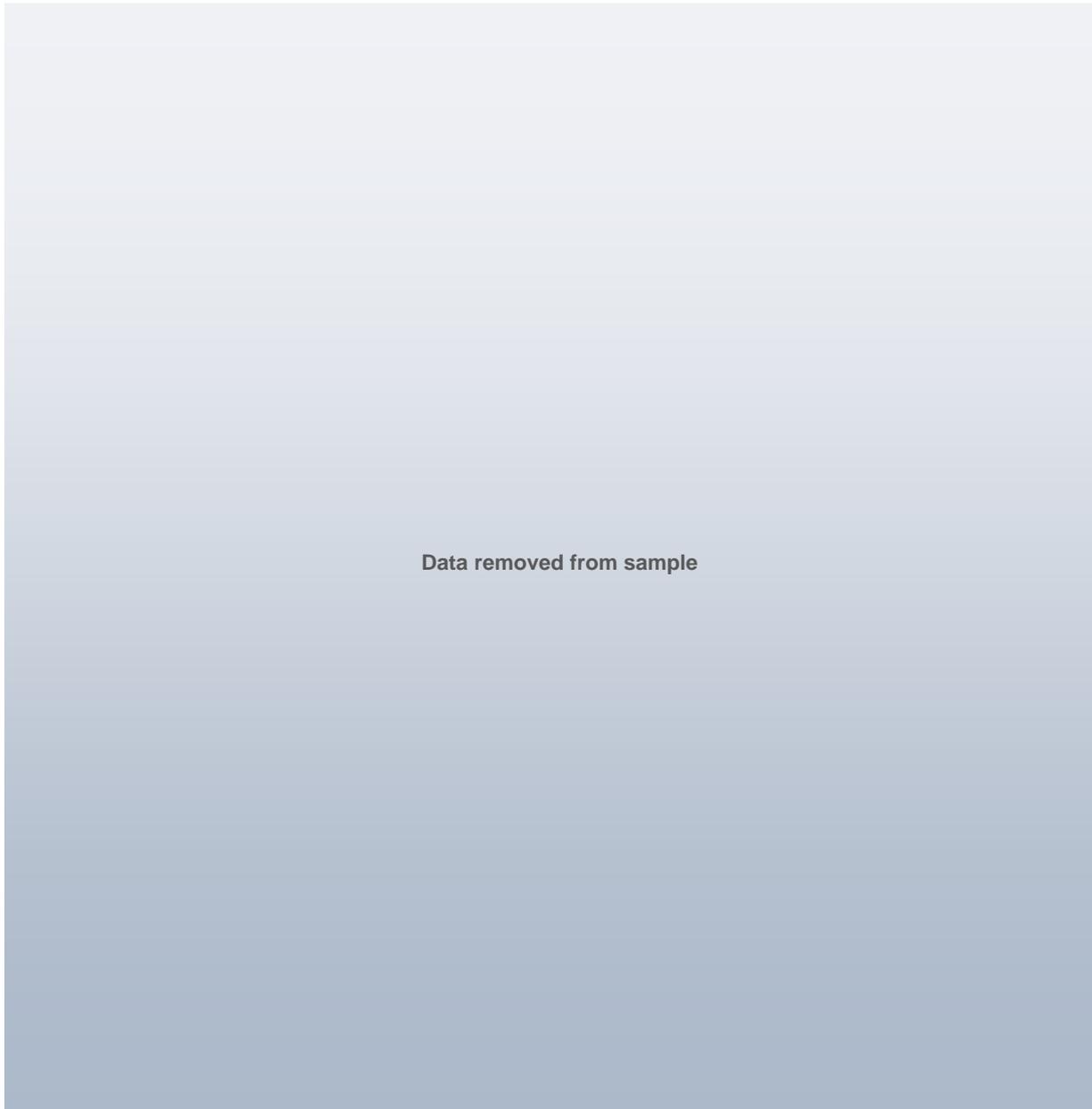


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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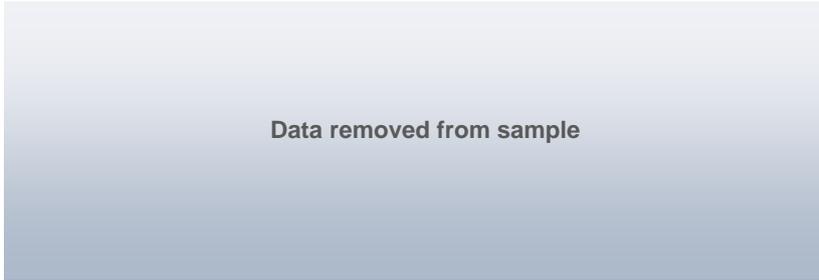


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail value rsp	2016	2017	2018	2019	2020	2021
Baby and Child-specific Products	Data removed from sample					
Bath and Shower						
Beauty and Personal Care						
Colour Cosmetics						

- Deodorants
- Depilatories
- Fragrances
- Hair Care
- Mass Beauty and Personal Care
- Men's Grooming
- Oral Care
- Skin Care
- Sun Care



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Non-Grocery Specialists						
-- Apparel and Footwear Specialists						
-- Appliances and Electronics Specialists						
-- Health and Beauty Specialist						
--- Beauty Specialists						
--- Chemists/Pharmacies						
--- Drugstores/parapharmacies						
--- Other BPC Health and Beauty Specialist Retailers						
-- Home and Garden Specialist Retailers						
--- Homewares and Home Furnishing Stores						
-- Other Non-Grocery Retailers						
--- Outdoor Markets						
--- Other BPC Non-Grocery Specialists						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
Non-Store Retailing						
- Direct Selling						

- Homeshopping
- E-Commerce
- Vending
- Non-retail channels
- Hair Salons
- Total

Data removed from sample

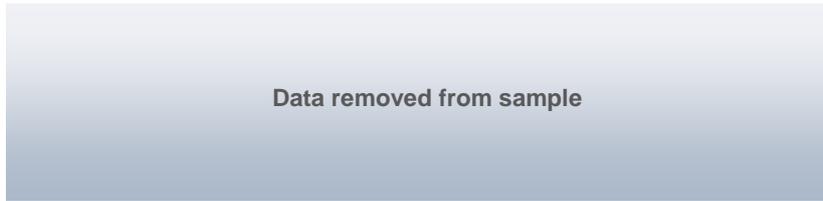
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail value rsp

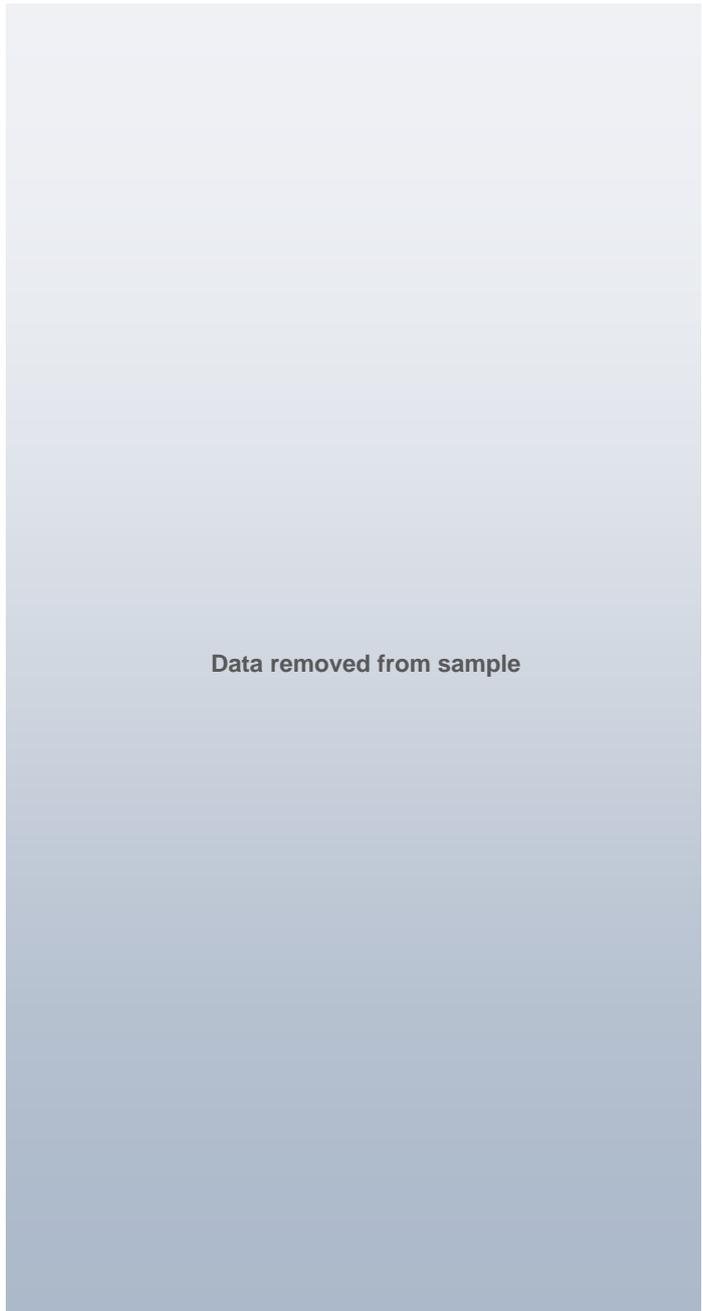
	Baby and Child-specific Products	Bath and Shower	Colour Cosmetics	Deodorants	Depilatories	Fragrances
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Non-Grocery Specialists						
-- Apparel and Footwear Specialists						
-- Appliances and Electronics Specialists						
-- Health and Beauty Specialist						
--- Beauty Specialists						
--- Chemists/Pharmacies						
--- Drugstores/parapharmacies						
--- Other BPC Health and Beauty Specialist Retailers						
-- Home and Garden Specialist Retailers						
--- Homewares and Home Furnishing Stores						
-- Other Non-Grocery Retailers						
--- Outdoor Markets						
--- Other BPC Non-Grocery Specialists						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
Non-Store Retailing						

- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Non-retail channels
- Hair Salons
- Total



Hair Care Men's Grooming Oral Care Skin Care Sun Care

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Non-Grocery Specialists
- Apparel and Footwear Specialists
- Appliances and Electronics Specialists
- Health and Beauty Specialist
- Beauty Specialists
- Chemists/Pharmacies
- Drugstores/parapharmacies
- Other BPC Health and Beauty Specialist Retailers
- Home and Garden Specialist Retailers
- Homewares and Home Furnishing Stores
- Other Non-Grocery Retailers
- Outdoor Markets
- Other BPC Non-Grocery Specialists
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Non-retail channels
- Hair Salons
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: BC = baby and child-specific products; BS = bath and shower; CC = colour cosmetics; DO = deodorants; DP = depilatories; FR = fragrances; HC = hair care; MG = men's grooming; OC = oral care; SK = skin care; SU = sun care

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

USD million	2021	2022	2023	2024	2025	2026
Baby and Child-specific Products	Data removed from sample					
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Oral Care Excl Power Toothbrushes						
Skin Care						
Sun Care						
Premium Beauty and Personal Care						
Prestige Beauty and Personal Care						
Mass Beauty and Personal Care						
Dermocosmetics Beauty and Personal Care						
Beauty and Personal Care						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances and baby and child-specific sun care categories

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

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Baby and Child-specific Products	Data removed from sample		
Bath and Shower			
Colour Cosmetics			
Deodorants			
Depilatories			
Fragrances			
Hair Care			
Men's Grooming			
Oral Care			
Oral Care Excl Power Toothbrushes			
Skin Care			
Sun Care			

Premium Beauty and Personal Care
 Prestige Beauty and Personal Care
 Mass Beauty and Personal Care
 Dermocosmetics Beauty and Personal Care
 Beauty and Personal Care

Data removed from sample

- Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
- Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care
- Note 2: Sum of categories is greater than market size because of double counting in men’s bath and shower, men’s deodorants, men’s hair care, men’s skin care, men’s fragrances and baby and child-specific sun care categories

DISCLAIMER

Forecast and scenario closing date: 11 April 2022
 Report closing date: 24 May 2022

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2021 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

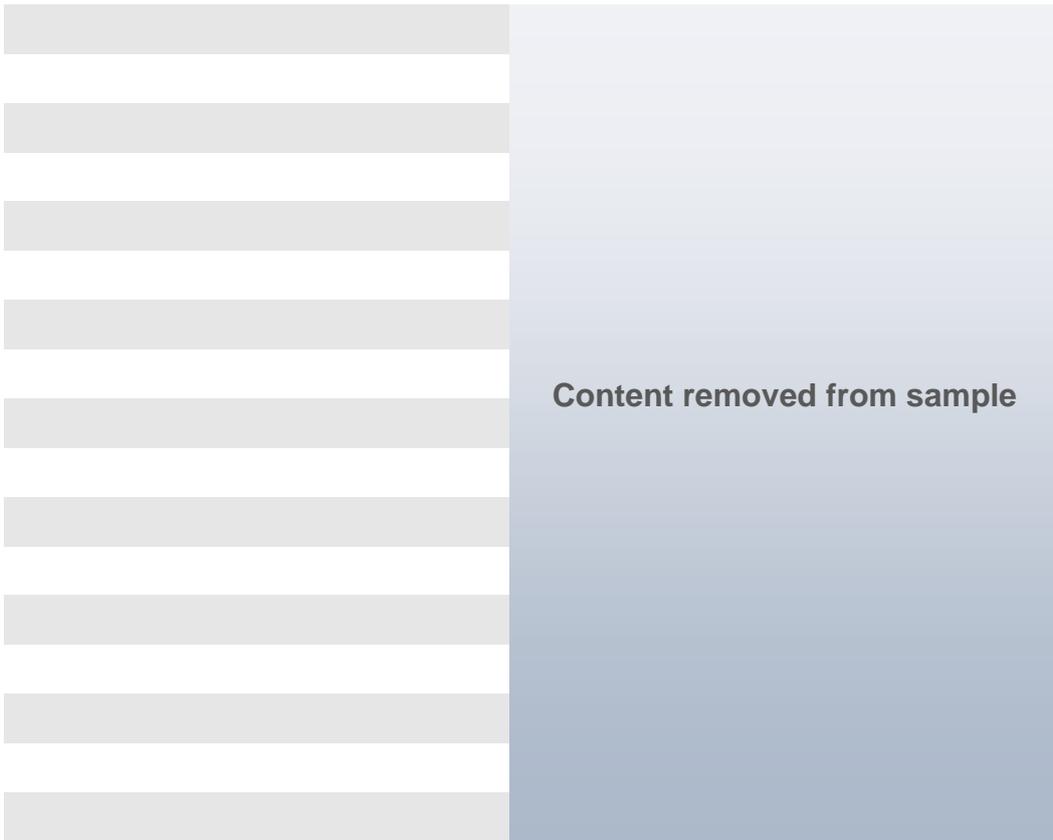
Official Sources	Content removed from sample
Trade Associations	

Trade Press

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Source: Euromonitor International

BABY AND CHILD-SPECIFIC PRODUCTS IN THE US - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

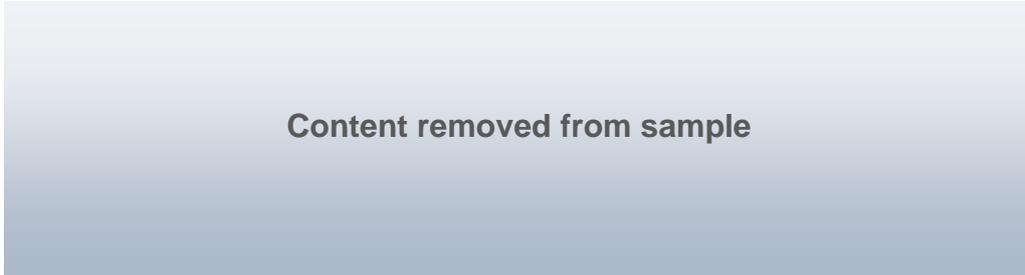
Baby and child-specific products sees growth across all categories

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Kylie Jenner extends her cosmetics line, venturing into baby care

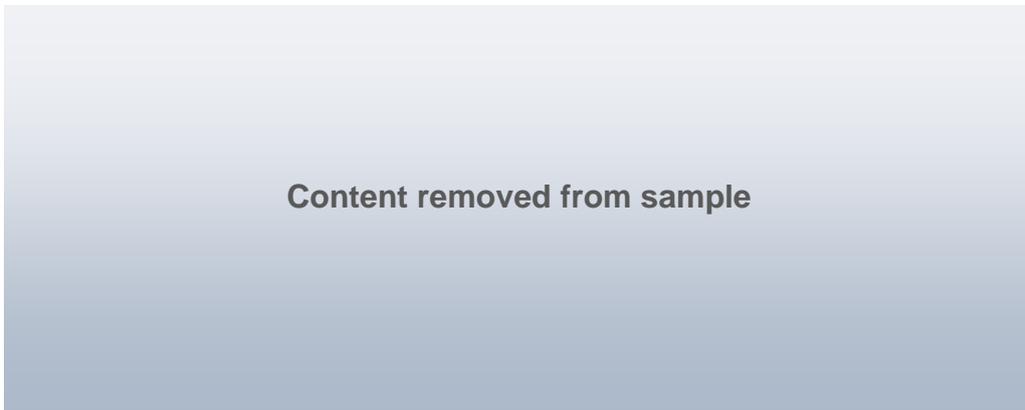
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Pandemic favourite CeraVe reformulates baby beauty lines

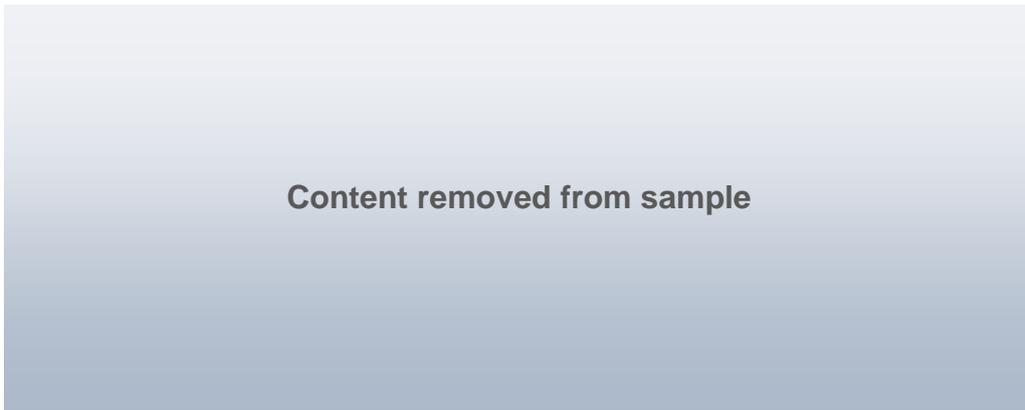


PROSPECTS AND OPPORTUNITIES

Filling the gap with products for melanin-rich skin



Pipette transitions from A premium to mass positioning



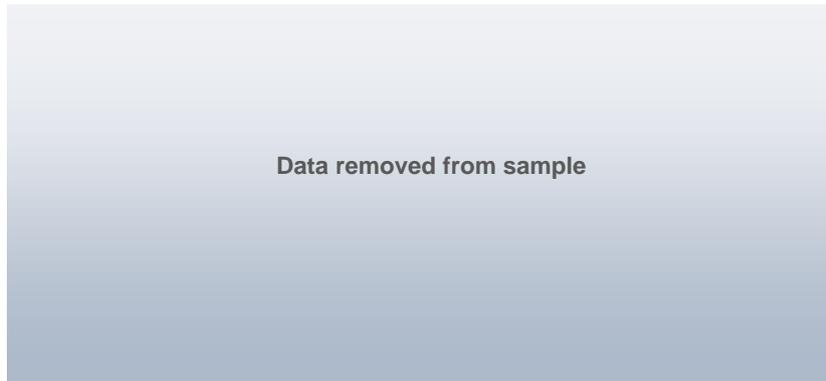
CATEGORY DATA

Table 11 Sales of Baby and Child-specific Products by Category: Value 2016-2021

USD million

	2016	2017	2018	2019	2020	2021
Baby and Child-specific	[Placeholder for data]					

Hair Care
 Baby and Child-specific
 Skin Care
 Baby and Child-specific
 Sun Care
 Baby and Child-specific
 Toiletries
 Baby Wipes
 Medicated Baby and
 Child-specific Products
 Nappy (Diaper) Rash
 Treatments
 Baby and Child-specific
 Products



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 Sales of Baby and Child-specific Products by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Baby and Child-specific Hair Care	Data removed from sample		
Baby and Child-specific Skin Care			
Baby and Child-specific Sun Care			
Baby and Child-specific Toiletries			
Baby Wipes			
Medicated Baby and Child-specific Products			
Nappy (Diaper) Rash Treatments			
Baby and Child-specific Products			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2016-2021

% retail value rsp

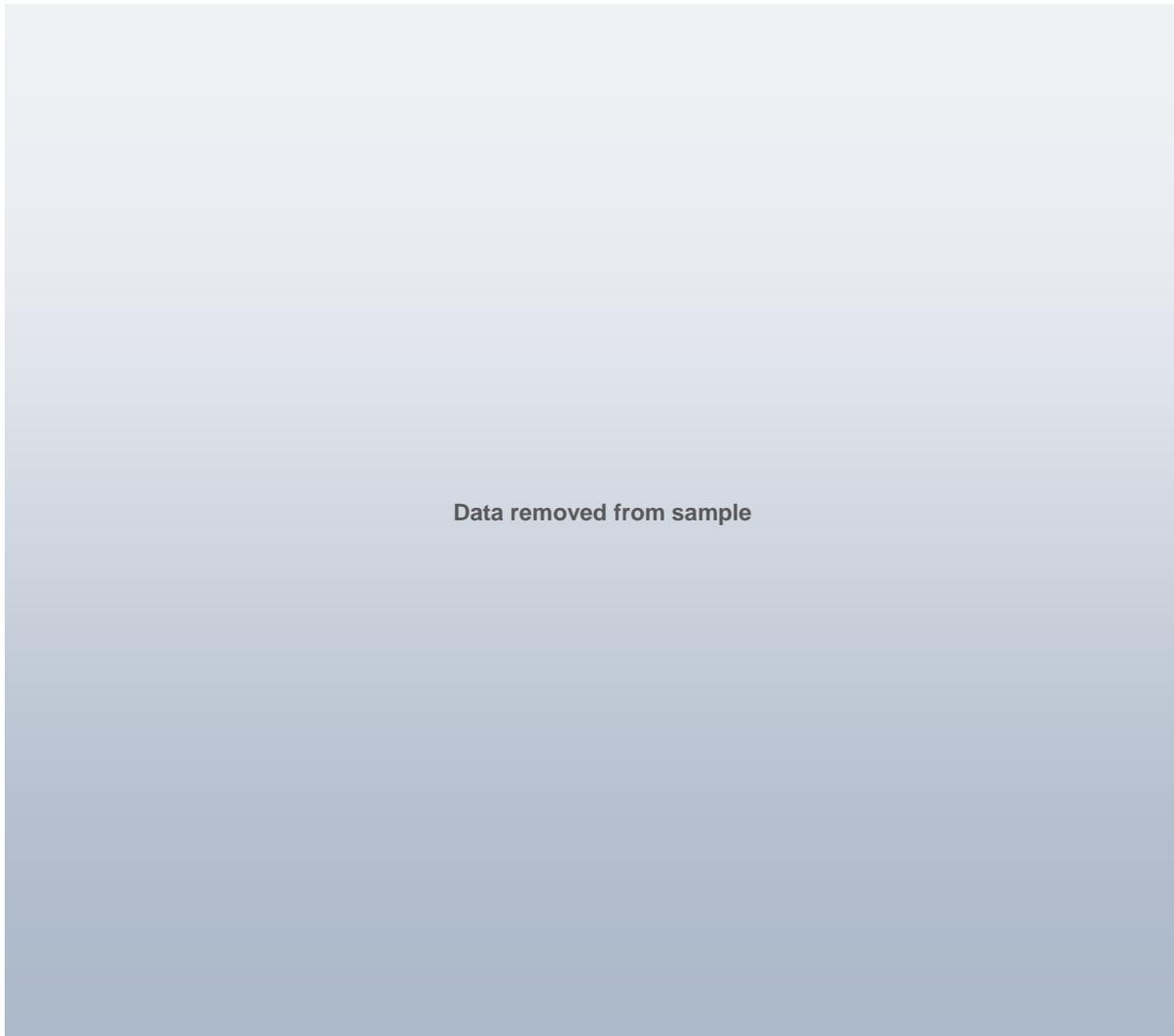
	2016	2017	2018	2019	2020	2021
Premium	Data removed from sample					
Mass						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 NBO Company Shares of Baby and Child-specific Products: % Value 2017-2021

% retail value rsp

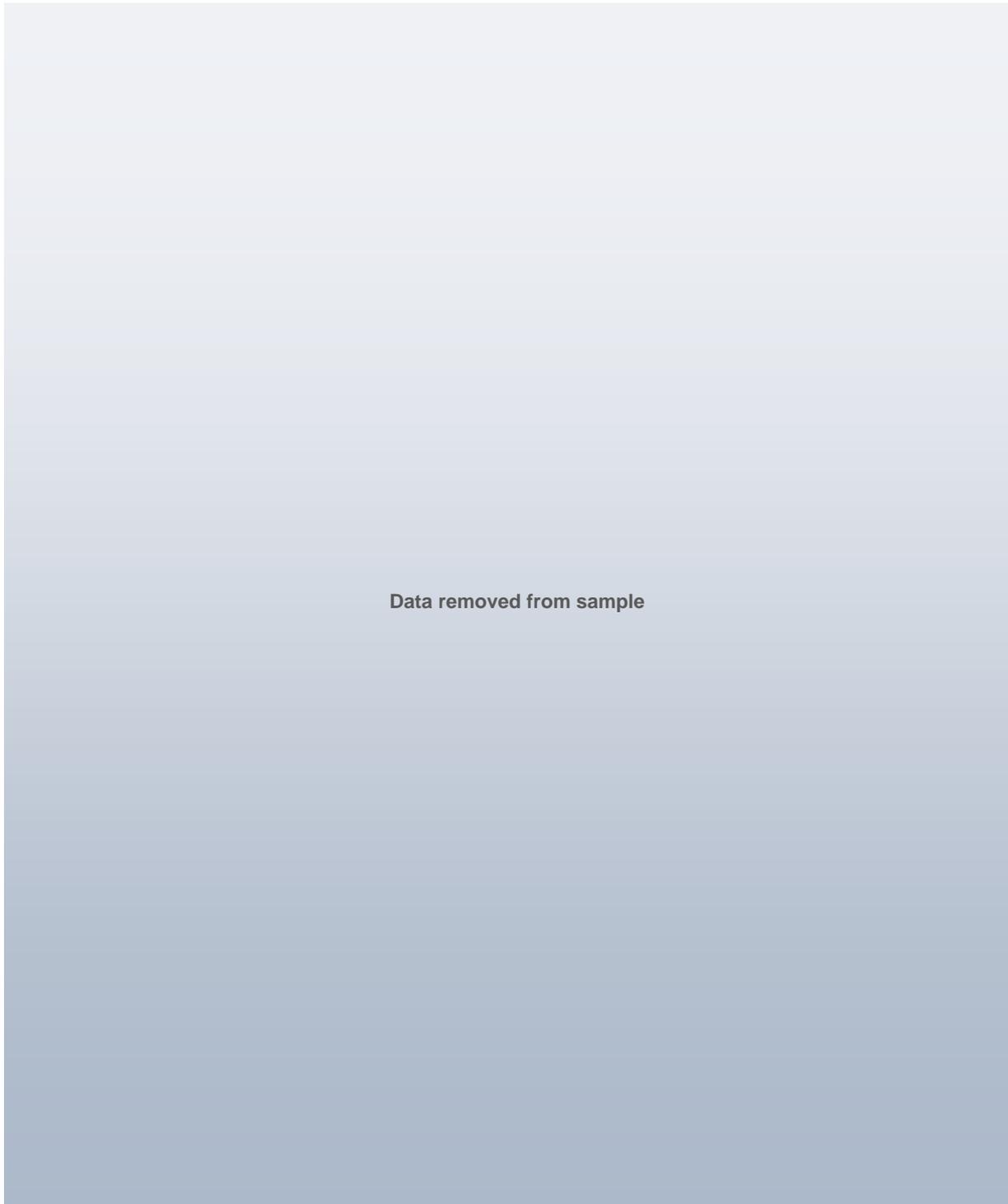
Company	2017	2018	2019	2020	2021
	Data removed from sample				



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 LBN Brand Shares of Baby and Child-specific Products: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2018-2021

% retail value rsp

Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Baby and Child-specific Products by Category: Value 2021-2026

USD million	2021	2022	2023	2024	2025	2026
-------------	------	------	------	------	------	------

Baby and Child-specific Hair Care	Data removed from sample					
Baby and Child-specific Skin Care						
Baby and Child-specific Sun Care						
Baby and Child-specific Toiletries						
Baby Wipes						
Medicated Baby and Child-specific Products						
Nappy (Diaper) Rash Treatments						
Baby and Child-specific Products						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Baby and Child-specific Hair Care	Data removed from sample		
Baby and Child-specific Skin Care			
Baby and Child-specific Sun Care			
Baby and Child-specific Toiletries			
Baby Wipes			
Medicated Baby and Child-specific Products			
Nappy (Diaper) Rash Treatments			
Baby and Child-specific Products			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

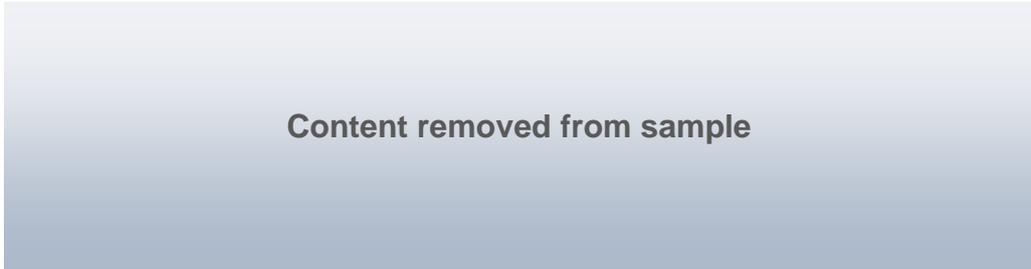
Table 21 Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2021-2026

% retail value rsp	2021	2022	2023	2024	2025	2026
Premium	Data removed from sample					
Mass						
Total						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

BATH AND SHOWER IN THE US - CATEGORY ANALYSIS

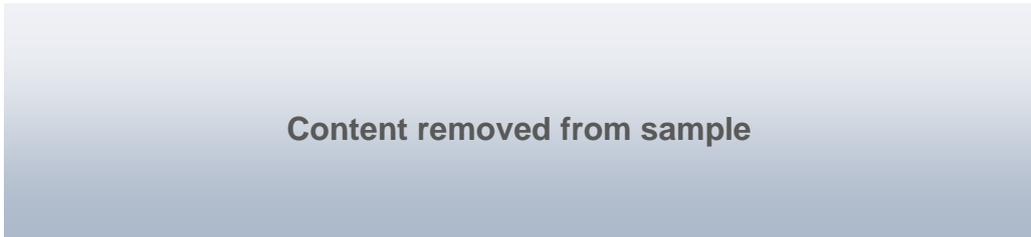
KEY DATA FINDINGS



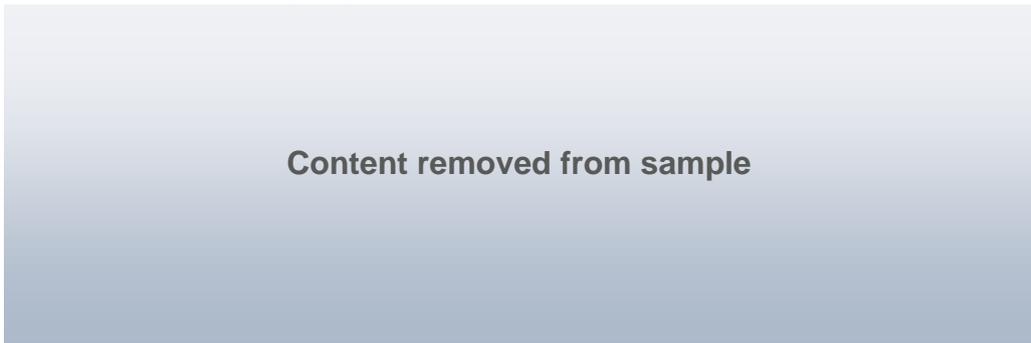
2021 DEVELOPMENTS

Hand sanitisers sees reduced demand, but remains well above pre-2020 levels

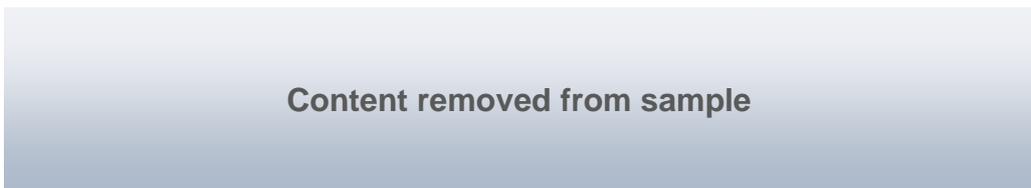
Although hygiene products in general experienced record growth during the COVID-19



Body wash/shower gel grows as bar soap declines



New offerings amidst continued growth in intimate hygiene



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PROSPECTS AND OPPORTUNITIES

Return to normality for hand sanitisers and hygiene products

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Growing popularity of premium products

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“Wellness” rising as A sales driver

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CATEGORY DATA

Table 22 Sales of Bath and Shower by Category: Value 2016-2021

USD million	2016	2017	2018	2019	2020	2021
Hand Sanitisers	Data removed from sample					
Bar Soap						
Bath Additives						
Body Powder						
Body Wash/Shower Gel						
Intimate Hygiene						
- Intimate Washes						
- Intimate Wipes						
Liquid Soap						
Bath and Shower						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 Sales of Bath and Shower by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Hand Sanitisers	Data removed from sample		
Bar Soap			
Bath Additives			
Body Powder			
Body Wash/Shower Gel			
Intimate Hygiene			
- Intimate Washes			
- Intimate Wipes			
Liquid Soap			
Bath and Shower			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

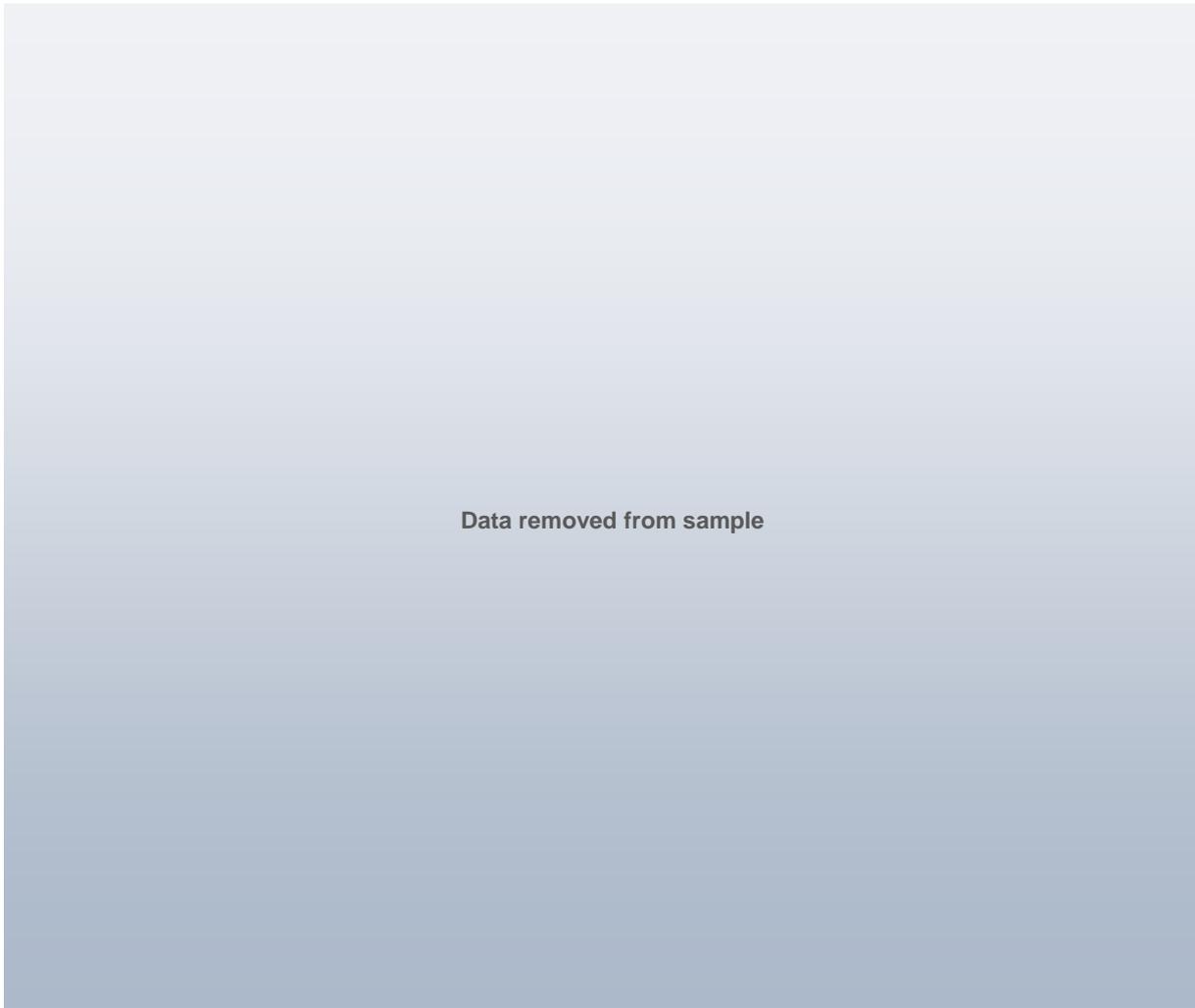
Table 24 Sales of Bath and Shower by Premium vs Mass: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Premium	Data removed from sample					
Mass						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 25 NBO Company Shares of Bath and Shower: % Value 2017-2021

% retail value rsp	2017	2018	2019	2020	2021
Company	Data removed from sample				

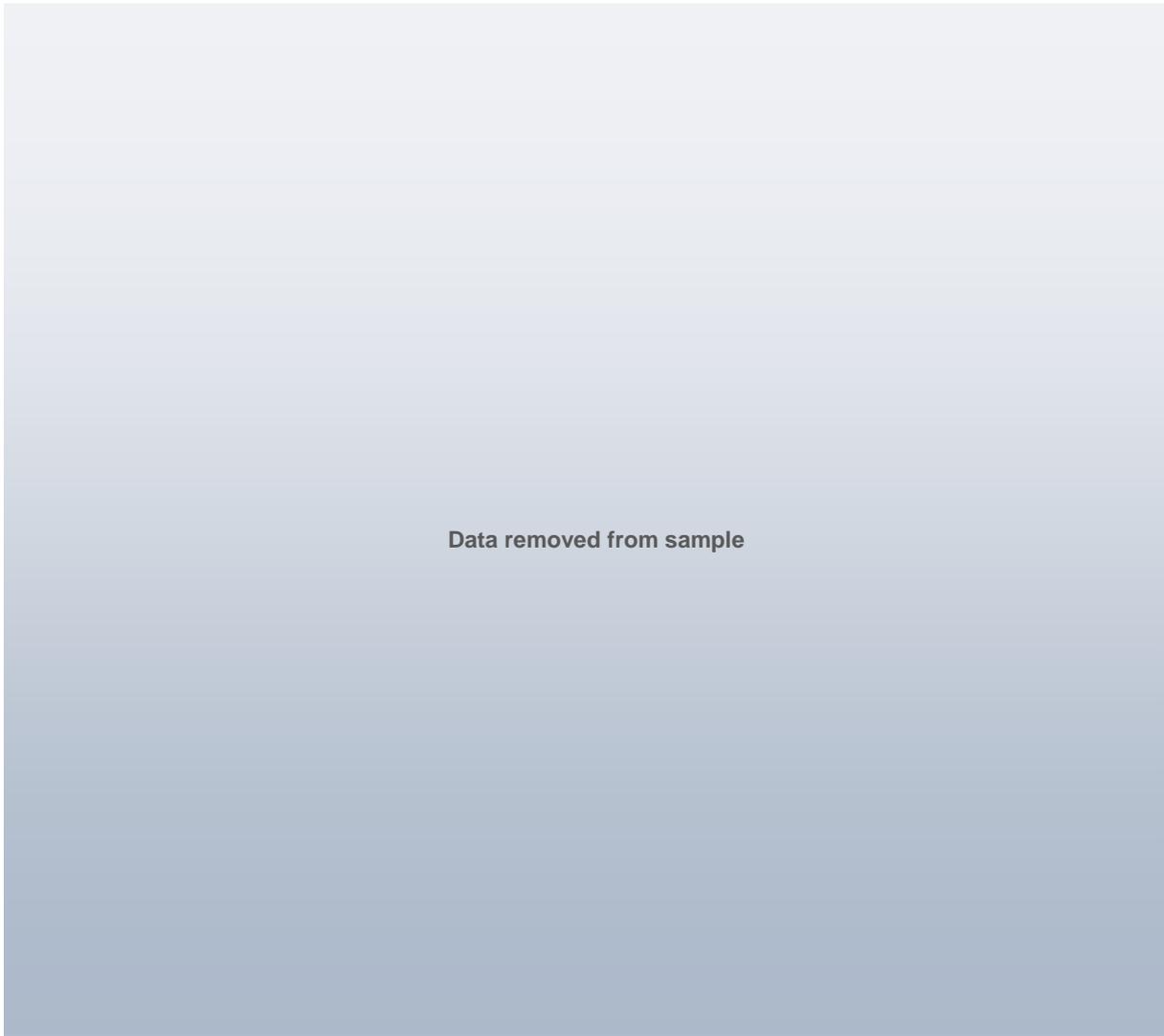


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 26 LBN Brand Shares of Bath and Shower: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------

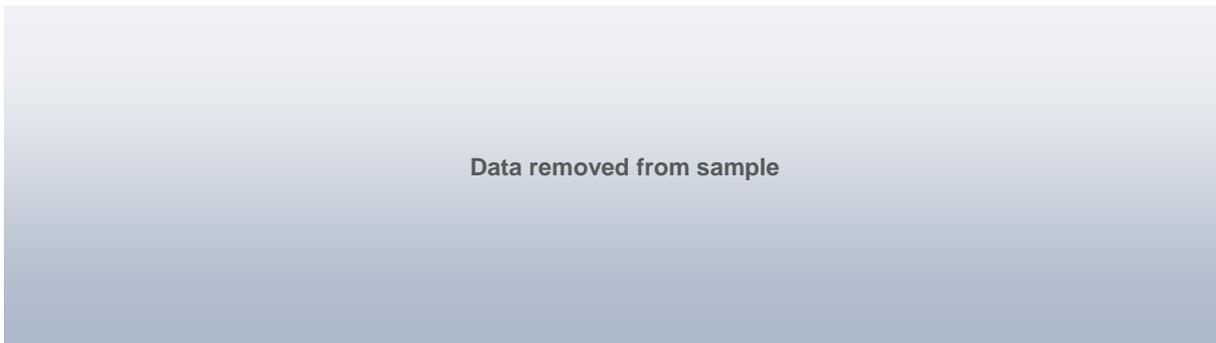


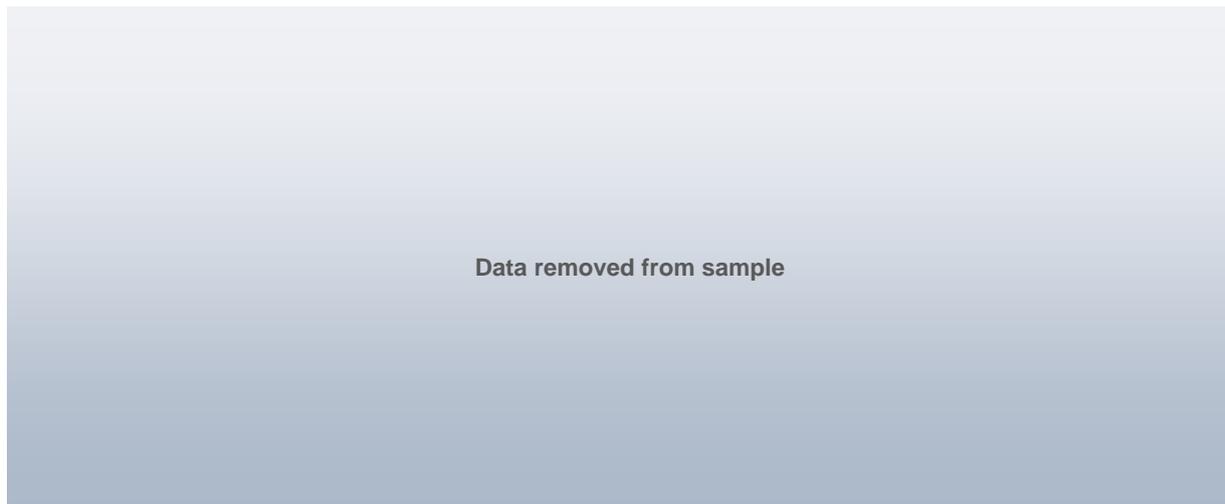


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27 LBN Brand Shares of Premium Bath and Shower: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------





Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 28 Forecast Sales of Bath and Shower by Category: Value 2021-2026

USD million	2021	2022	2023	2024	2025	2026
Hand Sanitisers	Data removed from sample					
Bar Soap						
Bath Additives						
Body Powder						
Body Wash/Shower Gel						
Intimate Hygiene						
- Intimate Washes						
- Intimate Wipes						
Liquid Soap						
Bath and Shower						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 29 Forecast Sales of Bath and Shower by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Hand Sanitisers	Data removed from sample		
Bar Soap			
Bath Additives			
Body Powder			
Body Wash/Shower Gel			
Intimate Hygiene			
- Intimate Washes			
- Intimate Wipes			
Liquid Soap			
Bath and Shower			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 30 Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2021-2026

% retail value rsp	2021	2022	2023	2024	2025	2026
Premium	Data removed from sample					
Mass						
Total						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

COLOUR COSMETICS IN THE US - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Sales of eye make-up return to pre COVID-19 levels

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Celebrity and influencer brands drive discovery and renewed interest in colour cosmetics

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Self-expression, sustainability and genderless beauty sustain interest in nail products

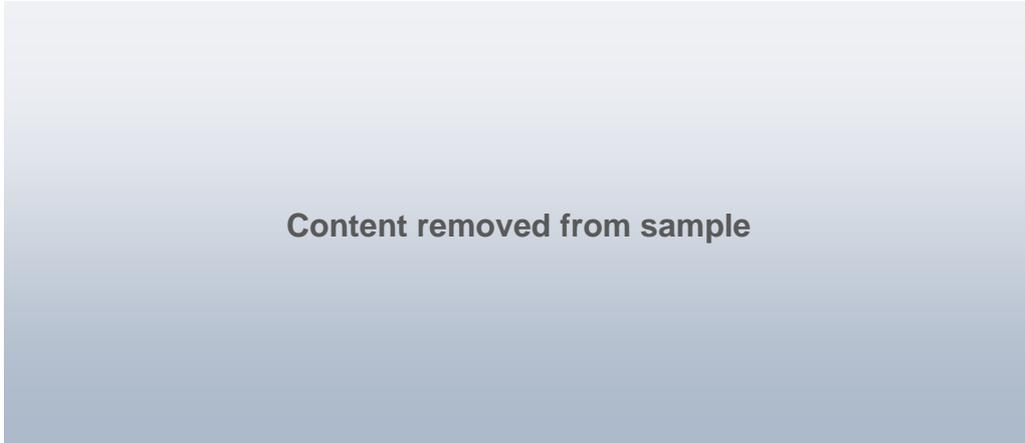
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PROSPECTS AND OPPORTUNITIES

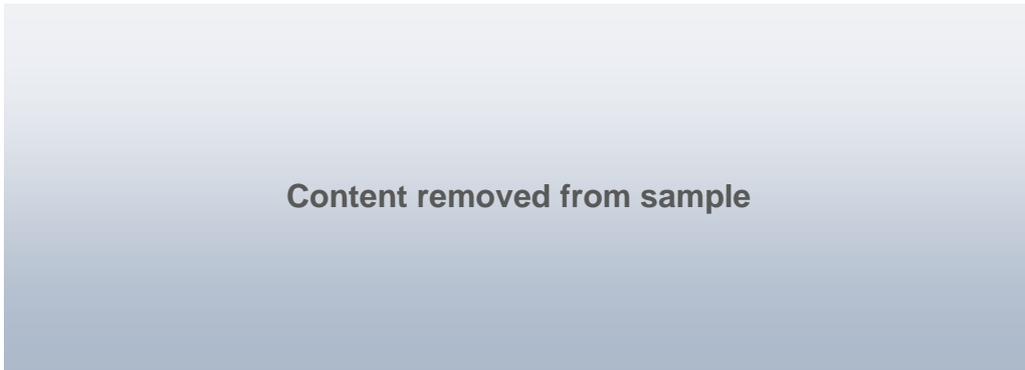
Lip products positioned to rebound in the forecast period due to relaxation of mask-wearing

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Product hybridity and “no make-up” make-up to threaten opportunities for full coverage facial make-up...



...while Y2K trends will boost sales in previously underperforming categories and colours



CATEGORY DATA

Table 31 Sales of Colour Cosmetics by Category: Value 2016-2021

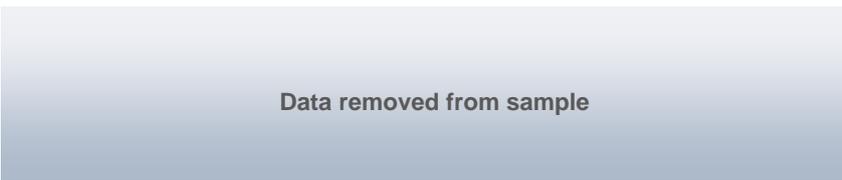
USD million

	2016	2017	2018	2019	2020	2021
Eye Make-Up	Data removed from sample					
- Eye Liner/Pencil						
-- Premium Eye Liner/Pencil						
-- Mass Eye Liner/Pencil						
- Eye Shadow						
-- Premium Eye Shadow						
-- Mass Eye Shadow						
- Mascara						
-- Premium Mascara						
-- Mass Mascara						
- Other Lash and Brow Make-Up						
-- Premium Other Lash						

- and Brow Make-Up
- Mass Other Lash and Brow Make-Up
- Facial Make-Up
- BB/CC Creams
- Premium BB/CC Creams
- Mass BB/CC Creams
- Blusher/Bronzer/Highlighter
- Premium Blusher/Bronzer/Highlighter
- Mass Blusher/Bronzer/Highlighter
- Foundation/Concealer
- Premium Foundation/Concealer
- Mass Foundation/Concealer
- Powder
- Premium Powder
- Mass Powder
- Other Facial Make-Up
- Premium Other Facial Make-Up
- Mass Other Facial Make-Up
- Lip Products
- Lip Gloss
- Premium Lip Gloss
- Mass Lip Gloss
- Lip Liner/Pencil
- Premium Lip Liner/Pencil
- Mass Lip Liner/Pencil
- Lipstick
- Premium Lipstick
- Mass Lipstick
- Other Lip Products
- Premium Other Lip Products
- Mass Other Lip Products
- Nail Products
- Nail Polish
- Premium Nail Polish
- Mass Nail Polish
- Nail Treatments/Strengthener
- Premium Nail Treatments/Strengthener
- Mass Nail Treatments/Strengthener
- Polish Remover
- Premium Polish Remover
- Mass Polish Remover
- Other Nail Products
- Premium Other Nail Products
- Mass Other Nail Products
- Colour Cosmetics Sets/

Data removed from sample

- Kits
- Premium Colour Cosmetics Sets/Kits
- Mass Colour Cosmetics Sets/Kits
- Colour Cosmetics



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 32 Sales of Colour Cosmetics by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Eye Make-Up	Data removed from sample		
- Eye Liner/Pencil			
-- Premium Eye Liner/Pencil			
-- Mass Eye Liner/Pencil			
- Eye Shadow			
-- Premium Eye Shadow			
-- Mass Eye Shadow			
- Mascara			
-- Premium Mascara			
-- Mass Mascara			
- Other Lash and Brow Make-Up			
-- Premium Other Lash and Brow Make-Up			
-- Mass Other Lash and Brow Make-Up			
Facial Make-Up			
- BB/CC Creams			
-- Premium BB/CC Creams			
-- Mass BB/CC Creams			
- Blusher/Bronzer/Highlighter			
-- Premium Blusher/Bronzer/Highlighter			
-- Mass Blusher/Bronzer/Highlighter			
- Foundation/Concealer			
-- Premium Foundation/Concealer			
-- Mass Foundation/Concealer			
- Powder			
-- Premium Powder			
-- Mass Powder			
- Other Facial Make-Up			
-- Premium Other Facial Make-Up			
-- Mass Other Facial Make-Up			
Lip Products			
- Lip Gloss			
-- Premium Lip Gloss			
-- Mass Lip Gloss			
- Lip Liner/Pencil			
-- Premium Lip Liner/Pencil			
-- Mass Lip Liner/Pencil			
- Lipstick			
-- Premium Lipstick			
-- Mass Lipstick			
- Other Lip Products			
-- Premium Other Lip Products			
-- Mass Other Lip Products			
Nail Products			
- Nail Polish			
-- Premium Nail Polish			

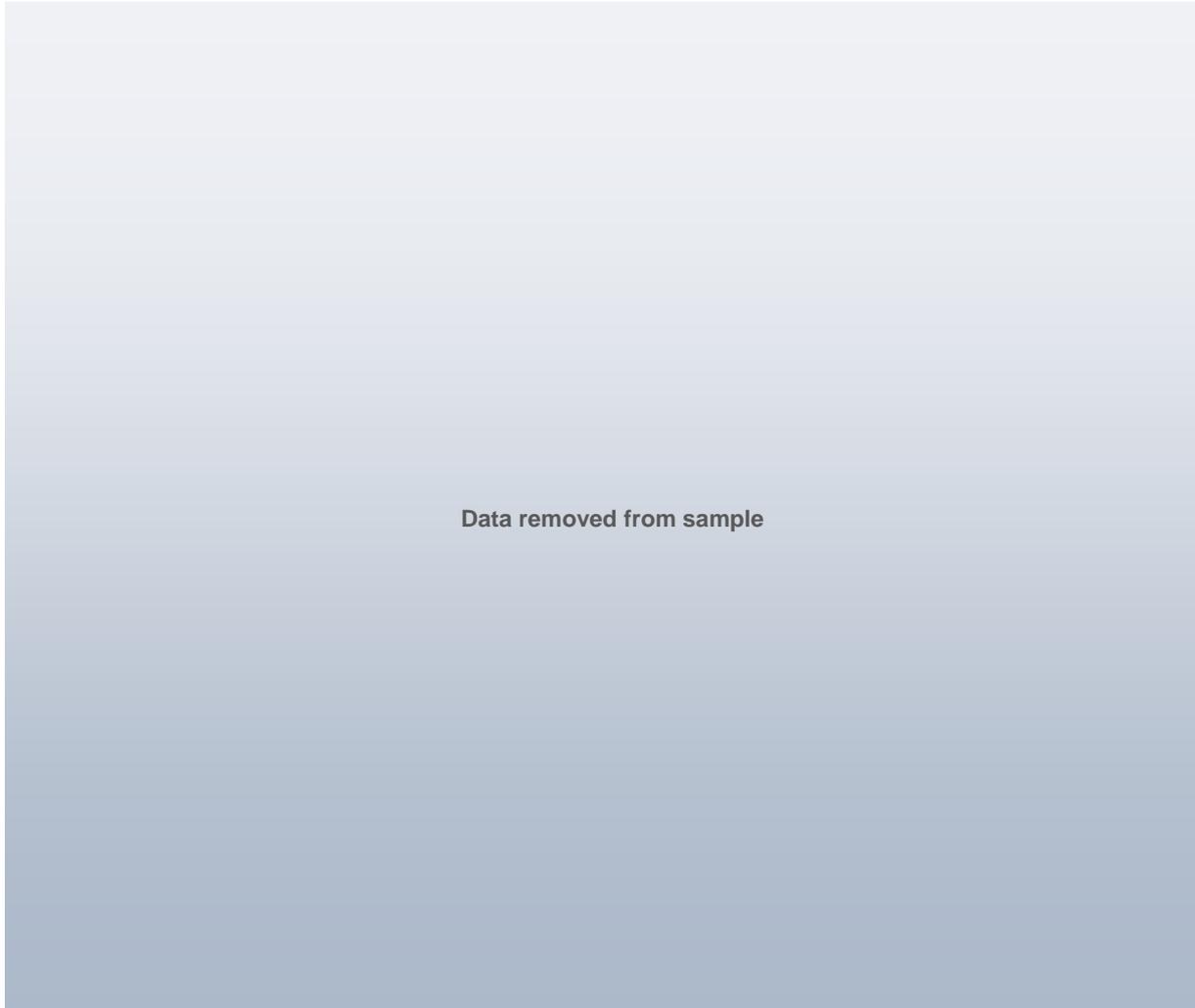
- Mass Nail Polish
- Nail Treatments/Strengtheners
- Premium Nail Treatments/Strengtheners
- Mass Nail Treatments/Strengtheners
- Polish Remover
- Premium Polish Remover
- Mass Polish Remover
- Other Nail Products
- Premium Other Nail Products
- Mass Other Nail Products
- Colour Cosmetics Sets/Kits
- Premium Colour Cosmetics Sets/Kits
- Mass Colour Cosmetics Sets/Kits
- Colour Cosmetics



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 33 NBO Company Shares of Colour Cosmetics: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------



Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 34 LBN Brand Shares of Colour Cosmetics: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 35 LBN Brand Shares of Eye Make-up: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------

Data removed from sample

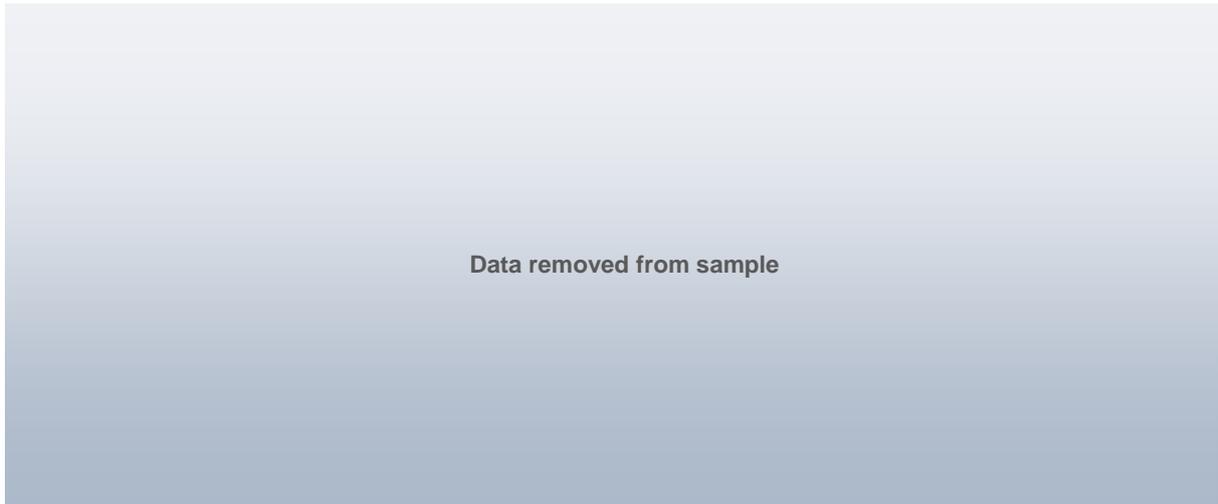
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 36 LBN Brand Shares of Facial Make-up: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------

Data removed from sample

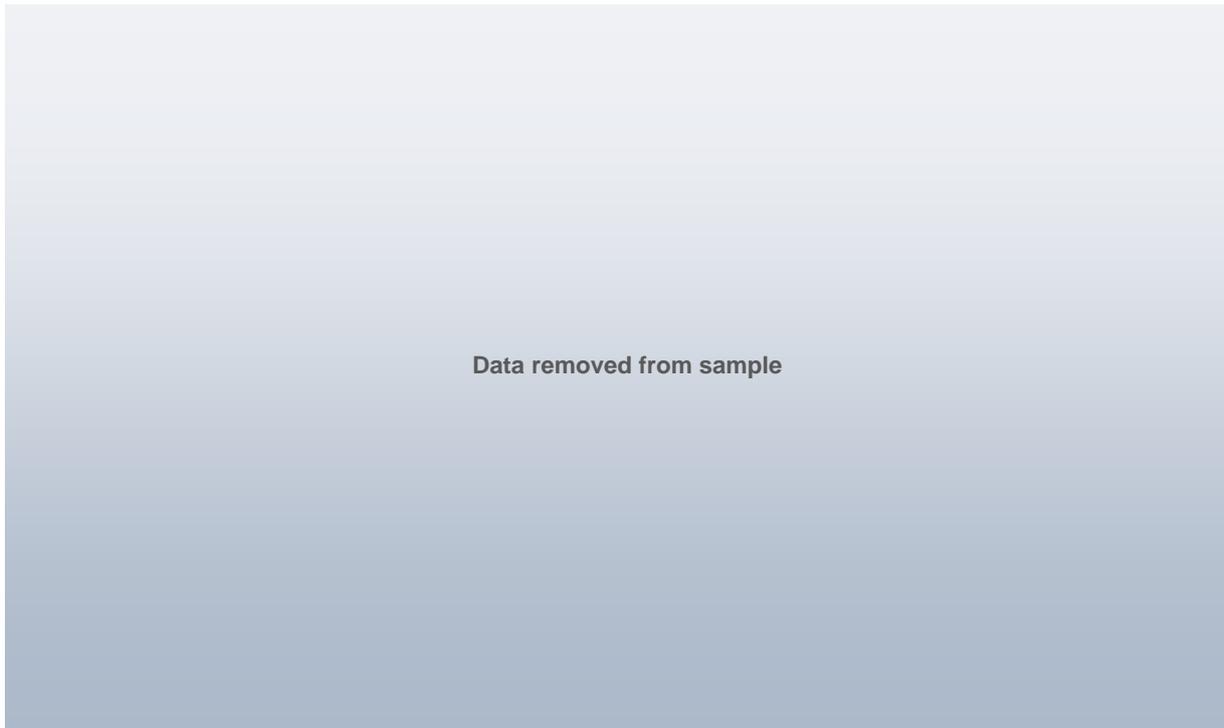


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 37 LBN Brand Shares of Lip Products: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------

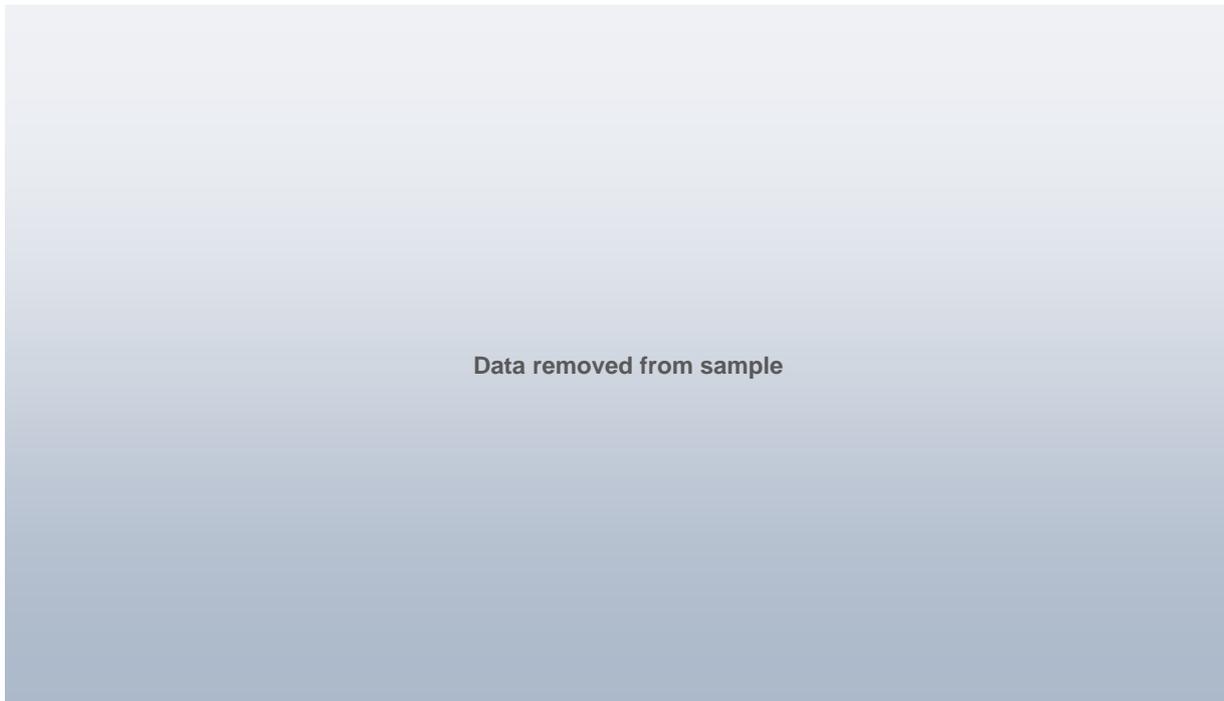


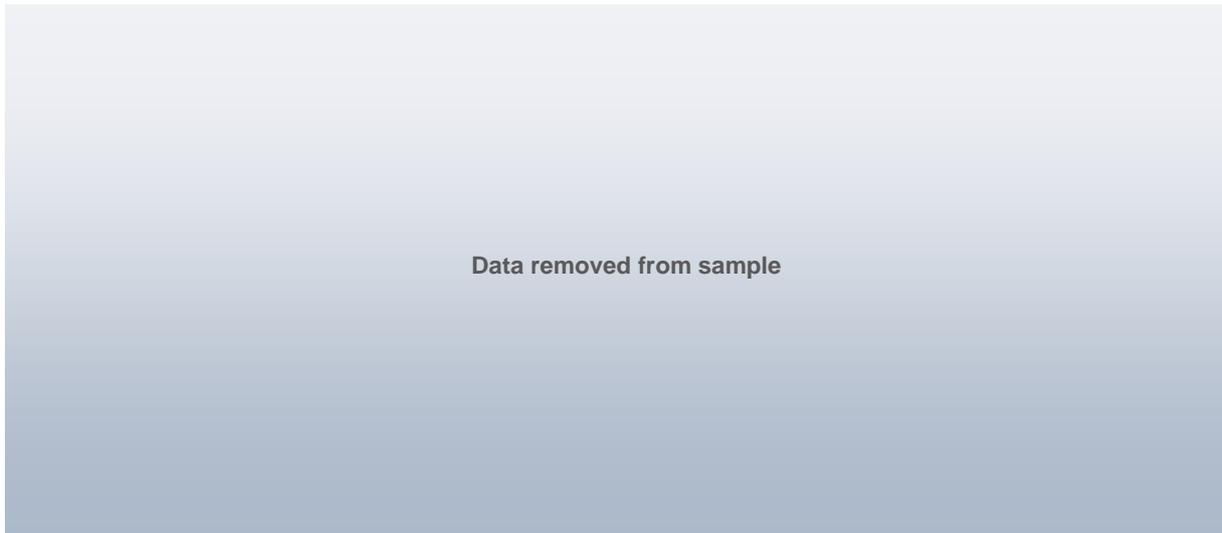


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 38 LBN Brand Shares of Nail Products: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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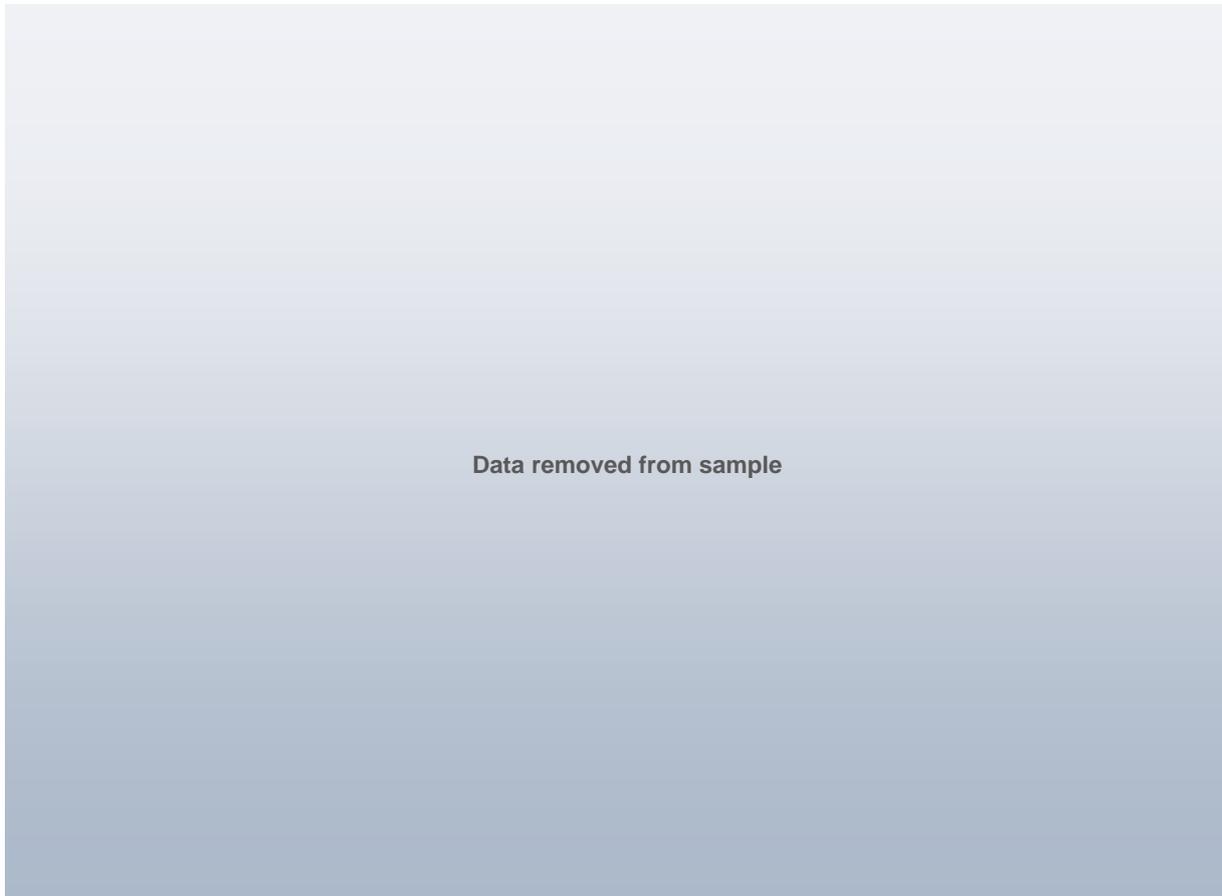




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 39 LBN Brand Shares of Premium Colour Cosmetics: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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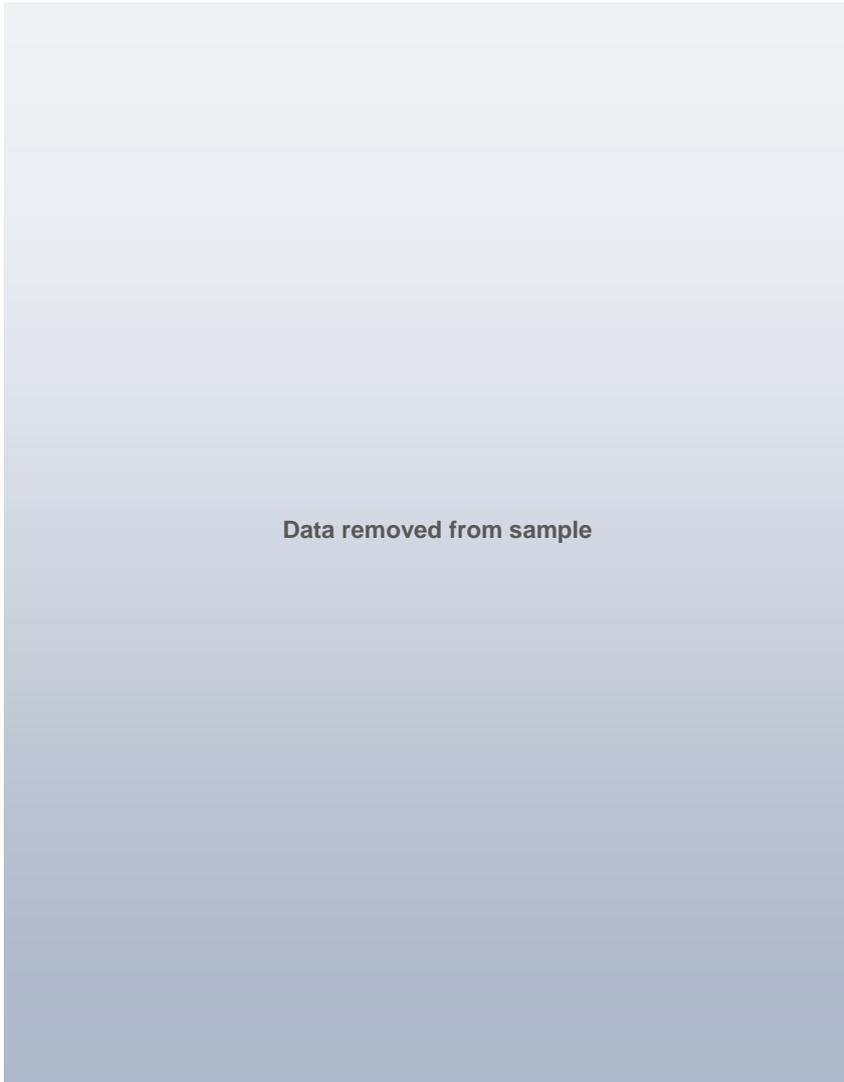
Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 40 Forecast Sales of Colour Cosmetics by Category: Value 2021-2026

USD million	2021	2022	2023	2024	2025	2026
Eye Make-Up	Data removed from sample					
- Eye Liner/Pencil						
-- Premium Eye Liner/Pencil						
-- Mass Eye Liner/Pencil						
- Eye Shadow						
-- Premium Eye Shadow						
-- Mass Eye Shadow						
- Mascara						
-- Premium Mascara						
-- Mass Mascara						
- Other Lash and Brow Make-Up						
-- Premium Other Lash and Brow Make-Up						
-- Mass Other Lash and Brow Make-Up						
Facial Make-Up						
- BB/CC Creams						
-- Premium BB/CC Creams						
-- Mass BB/CC Creams						
- Blusher/Bronzer/Highlighter						
-- Premium Blusher/Bronzer/Highlighter						
-- Mass Blusher/Bronzer/Highlighter						
- Foundation/Concealer						
-- Premium Foundation/Concealer						
-- Mass Foundation/Concealer						
- Powder						
-- Premium Powder						
-- Mass Powder						
- Other Facial Make-Up						
-- Premium Other Facial Make-Up						
-- Mass Other Facial Make-Up						
Lip Products						
- Lip Gloss						

- Premium Lip Gloss
- Mass Lip Gloss
- Lip Liner/Pencil
- Premium Lip Liner/Pencil
- Mass Lip Liner/Pencil
- Lipstick
- Premium Lipstick
- Mass Lipstick
- Other Lip Products
- Premium Other Lip Products
- Mass Other Lip Products
- Nail Products
- Nail Polish
- Premium Nail Polish
- Mass Nail Polish
- Nail Treatments/Strengthener
- Premium Nail Treatments/Strengthener
- Mass Nail Treatments/Strengthener
- Polish Remover
- Premium Polish Remover
- Mass Polish Remover
- Other Nail Products
- Premium Other Nail Products
- Mass Other Nail Products
- Colour Cosmetics Sets/Kits
- Premium Colour Cosmetics Sets/Kits
- Mass Colour Cosmetics Sets/Kits
- Colour Cosmetics



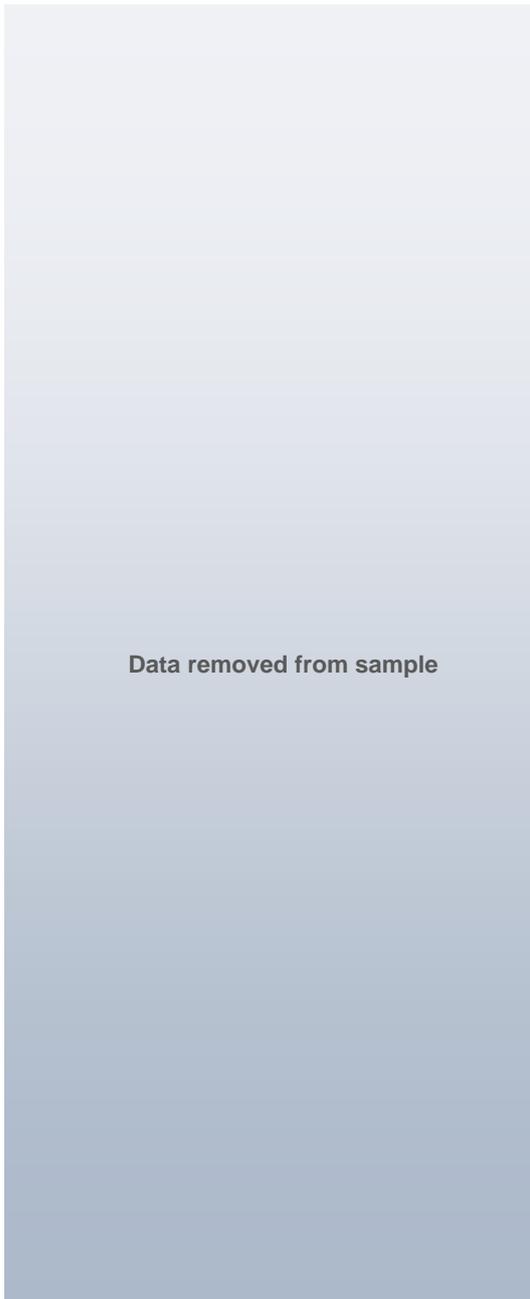
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 41 Forecast Sales of Colour Cosmetics by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Eye Make-Up	Data removed from sample		
- Eye Liner/Pencil			
-- Premium Eye Liner/Pencil			
-- Mass Eye Liner/Pencil			
- Eye Shadow			
-- Premium Eye Shadow			
-- Mass Eye Shadow			
- Mascara			
-- Premium Mascara			
-- Mass Mascara			
- Other Lash and Brow Make-Up			
-- Premium Other Lash and Brow Make-Up			

- Mass Other Lash and Brow Make-Up
- Facial Make-Up
- BB/CC Creams
- Premium BB/CC Creams
- Mass BB/CC Creams
- Blusher/Bronzer/Highlighter
- Premium Blusher/Bronzer/Highlighter
- Mass Blusher/Bronzer/Highlighter
- Foundation/Concealer
- Premium Foundation/Concealer
- Mass Foundation/Concealer
- Powder
- Premium Powder
- Mass Powder
- Other Facial Make-Up
- Premium Other Facial Make-Up
- Mass Other Facial Make-Up
- Lip Products
- Lip Gloss
- Premium Lip Gloss
- Mass Lip Gloss
- Lip Liner/Pencil
- Premium Lip Liner/Pencil
- Mass Lip Liner/Pencil
- Lipstick
- Premium Lipstick
- Mass Lipstick
- Other Lip Products
- Premium Other Lip Products
- Mass Other Lip Products
- Nail Products
- Nail Polish
- Premium Nail Polish
- Mass Nail Polish
- Nail Treatments/Strengtheners
- Premium Nail Treatments/Strengtheners
- Mass Nail Treatments/Strengtheners
- Polish Remover
- Premium Polish Remover
- Mass Polish Remover
- Other Nail Products
- Premium Other Nail Products
- Mass Other Nail Products
- Colour Cosmetics Sets/Kits
- Premium Colour Cosmetics Sets/Kits
- Mass Colour Cosmetics Sets/Kits
- Colour Cosmetics



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DEODORANTS IN THE US - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Strong growth in demand for deodorants amidst COVID-19 recovery

Content removed from sample

New-found growth for niche formats

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Clean beauty continues to climb

Content removed from sample

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Diversity and inclusion in deodorants

Content removed from sample

Blurring of beauty and personal care brands

Content removed from sample

Subscription models boost e-commerce growth

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CATEGORY DATA

Table 42 Sales of Deodorants by Category: Value 2016-2021

USD million	2016	2017	2018	2019	2020	2021
Deodorant Creams	Data removed from sample					
Deodorant Pumps						
Deodorant Roll-Ons						
Deodorant Sprays						
Deodorant Sticks						
Deodorant Wipes						
Deodorants						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 43 Sales of Deodorants by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Deodorant Creams	Data removed from sample		
Deodorant Pumps			
Deodorant Roll-Ons			
Deodorant Sprays			
Deodorant Sticks			
Deodorant Wipes			
Deodorants			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 44 Sales of Deodorants by Premium vs Mass: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Premium	Data removed from sample					
Mass						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 45 NBO Company Shares of Deodorants: % Value 2017-2021

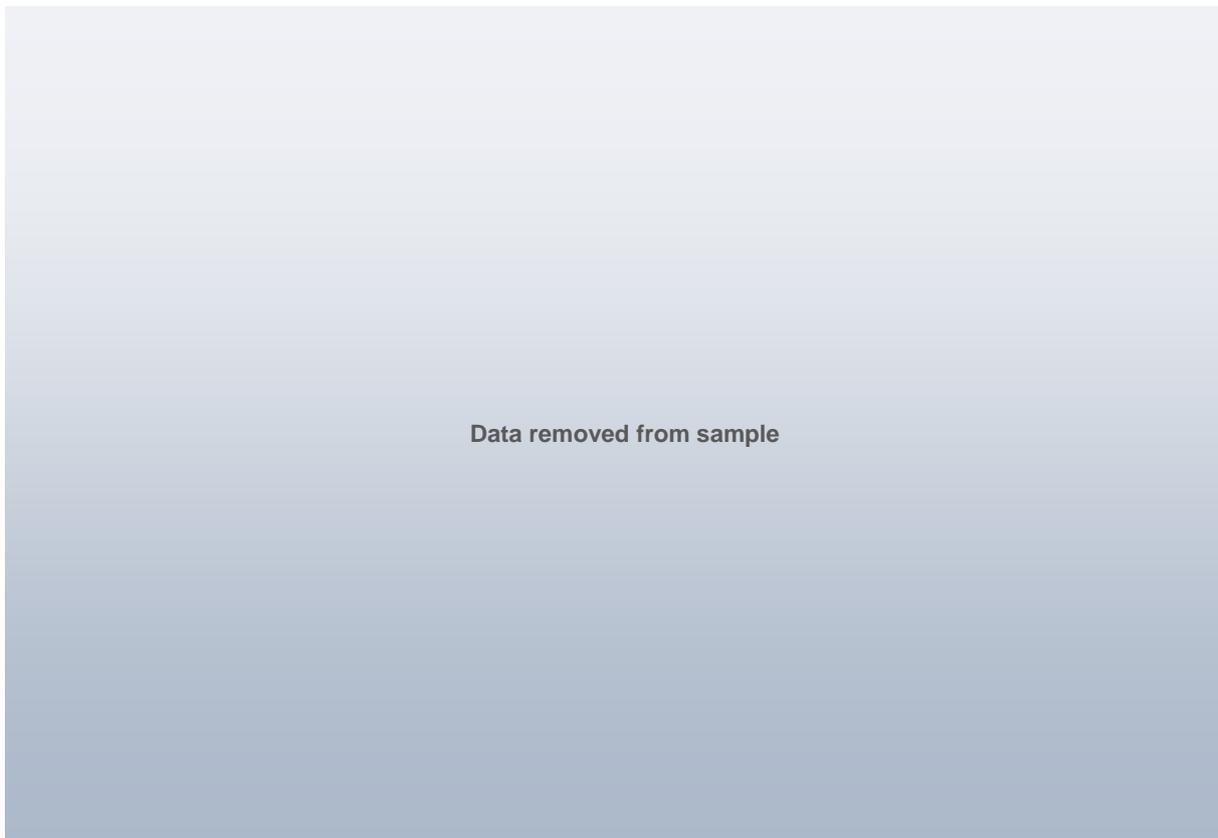
% retail value rsp	2017	2018	2019	2020	2021
Company	Data removed from sample				



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 46 LBN Brand Shares of Deodorants: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 47 Forecast Sales of Deodorants by Category: Value 2021-2026

USD million	2021	2022	2023	2024	2025	2026
Deodorant Creams	Data removed from sample					
Deodorant Pumps						
Deodorant Roll-Ons						
Deodorant Sprays						
Deodorant Sticks						
Deodorant Wipes						
Deodorants						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 48 Forecast Sales of Deodorants by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Deodorant Creams	Data removed from sample		
Deodorant Pumps			
Deodorant Roll-Ons			
Deodorant Sprays			
Deodorant Sticks			
Deodorant Wipes			
Deodorants			

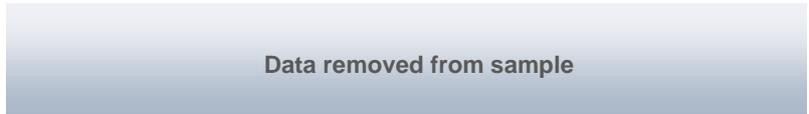
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 49 Forecast Sales of Deodorants by Premium Vs Mass: % Value 2021-2026

% retail value rsp

2021 2022 2023 2024 2025 2026

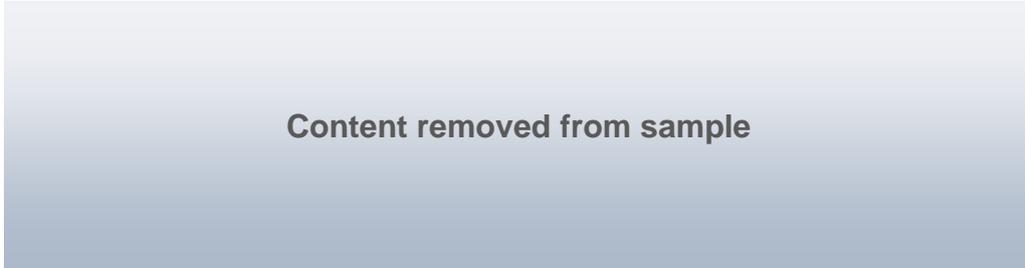
Premium
Mass
Total



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

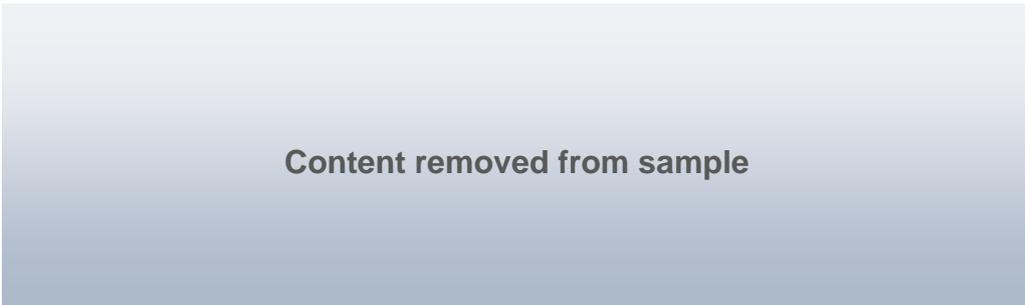
DEPILATORIES IN THE US - CATEGORY ANALYSIS

KEY DATA FINDINGS

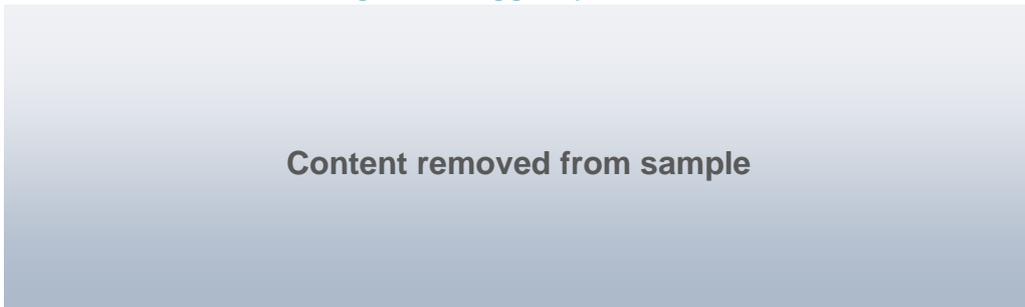


2021 DEVELOPMENTS

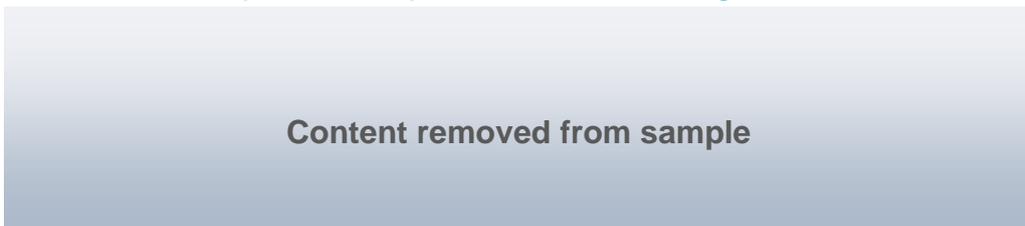
Uneven growth in hair removal products during COVID-19 recovery



Hair removers/bleaches grows sluggishly



Women's shave products experience accelerated growth



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PROSPECTS AND OPPORTUNITIES

Face shaving and dermaplaning grow in popularity

Content removed from sample

Shave clubs for women in the e-commerce era

Content removed from sample

Shaving as A part of lifestyle brands

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CATEGORY DATA

Table 50 Sales of Depilatories by Category: Value 2016-2021

USD million

	2016	2017	2018	2019	2020	2021
Hair Removers/Bleaches	Data removed from sample					
Women's Pre-Shave	Data removed from sample					

Women's Razors and Blades
Depilatories

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 51 Sales of Depilatories by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
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Hair Removers/Bleaches
Women's Pre-Shave
Women's Razors and Blades
Depilatories

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 52 Sales of Women's Razors and Blades by Type: % Value Breakdown 2017-2021

% retail value rsp	2017	2018	2019	2020	2021
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Disposables
Systems
Systems - Razors
Systems - Refill Blades
Other Razors and Blades
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 53 NBO Company Shares of Depilatories: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 54 LBN Brand Shares of Depilatories: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 55 Forecast Sales of Depilatories by Category: Value 2021-2026

USD million	2021	2022	2023	2024	2025	2026
-------------	------	------	------	------	------	------

Hair Removers/Bleaches	Data removed from sample					
Women's Pre-Shave						
Women's Razors and Blades						

Depilatories

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 56 Forecast Sales of Depilatories by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

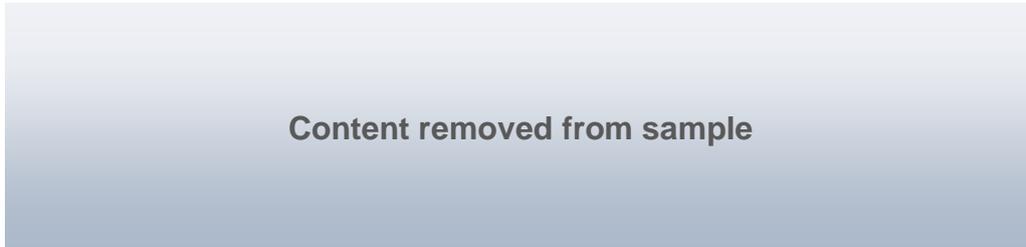
Hair Removers/Bleaches
 Women's Pre-Shave
 Women's Razors and Blades
 Depilatories

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

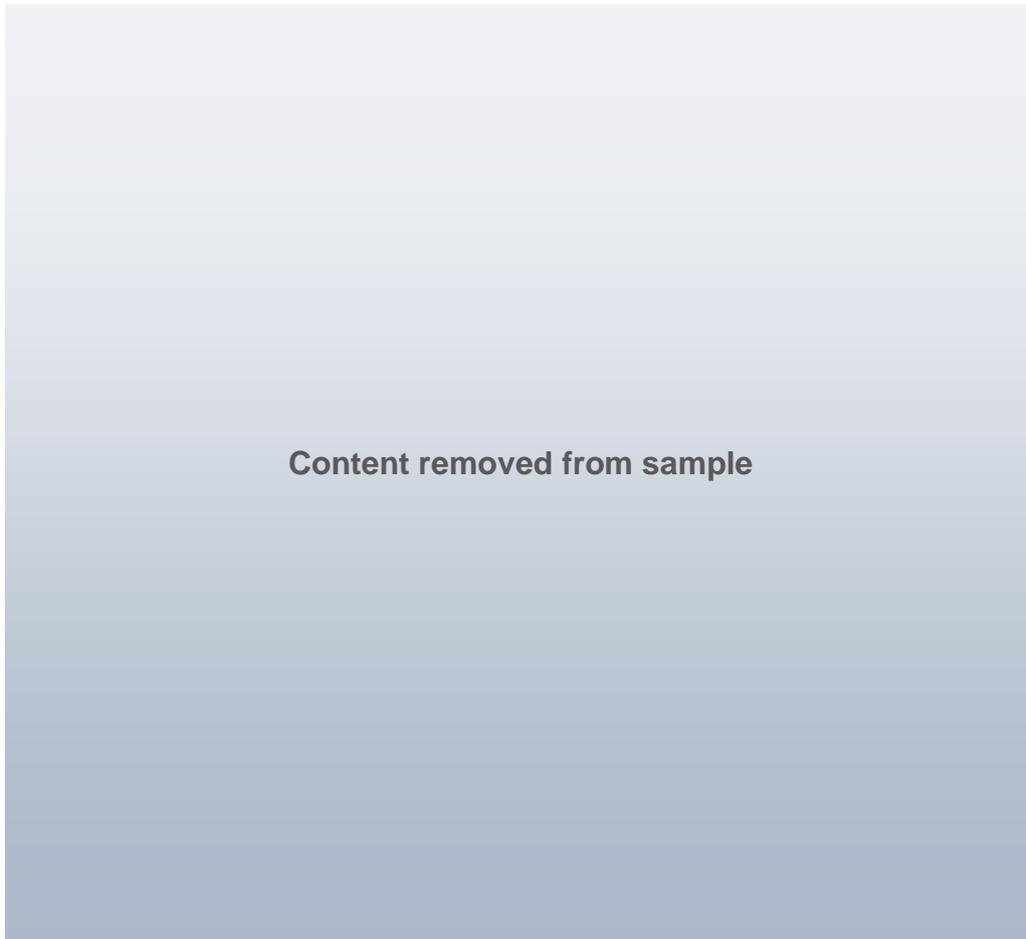
FRAGRANCES IN THE US - CATEGORY ANALYSIS

KEY DATA FINDINGS

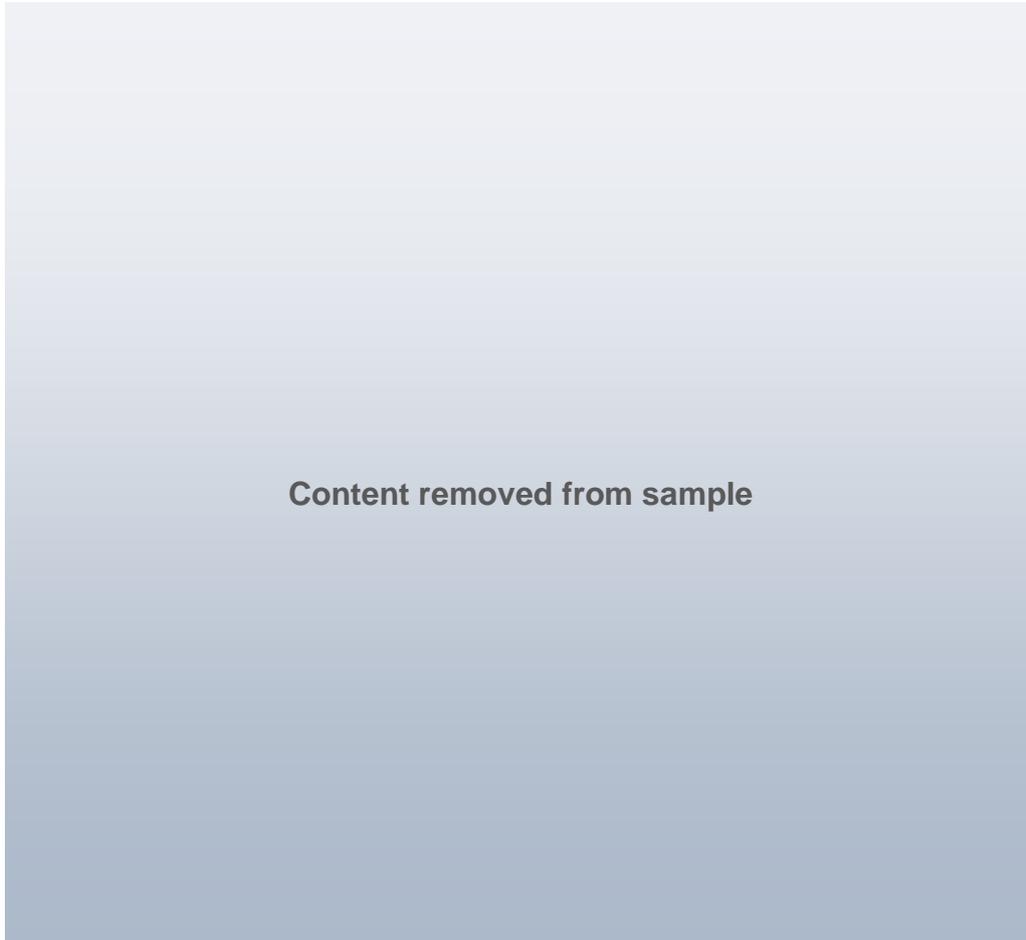


2021 DEVELOPMENTS

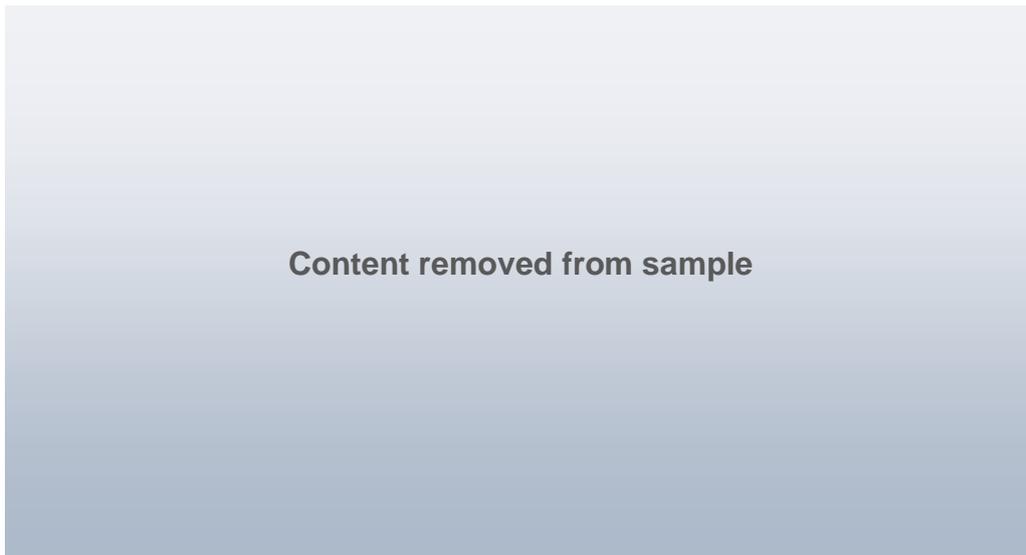
Self-care and feel-good trends drive the standout performance of fragrances in 2021



Consumers show A willingness to invest in premium fragrances, with players turning to discovery kits to encourage purchases



Digitalisation efforts focus on new ways of reaching and building connections with consumers



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PROSPECTS AND OPPORTUNITIES

While travel retail and tightening economic constraints could moderate growth over the forecast period, premium brands and unisex offerings will continue driving growth

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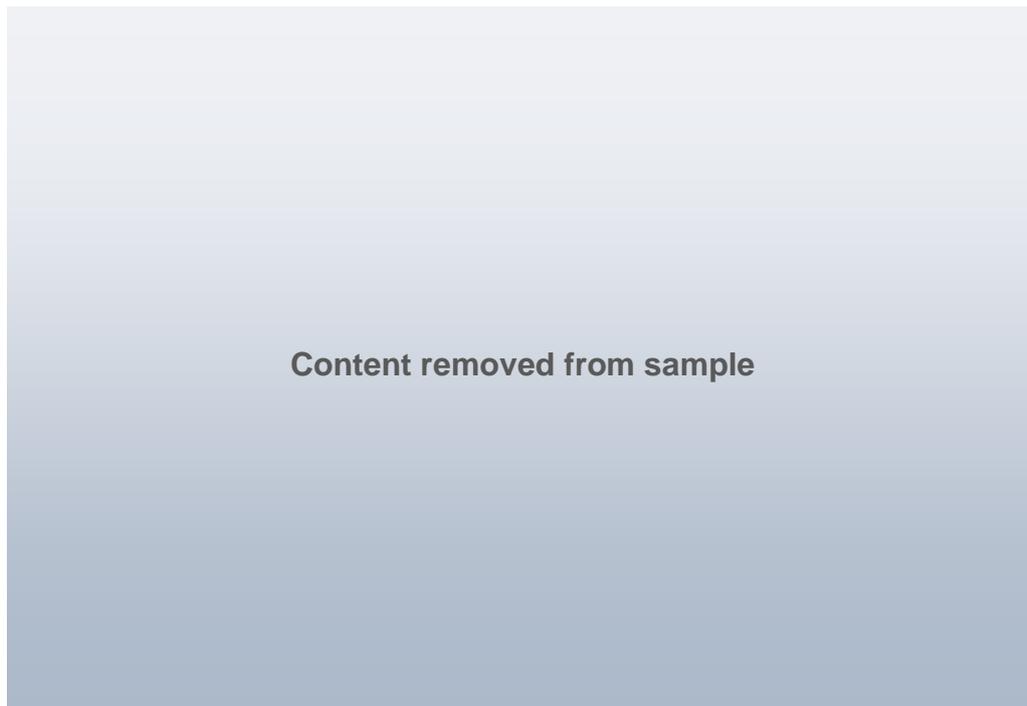
Content removed from sample

Expect A functional future, driven by technology and science-backed claims

Content removed from sample

Players will experiment with different avenues to meet demands for sustainability

Content removed from sample



CATEGORY DATA

Table 57 Sales of Fragrances by Category: Value 2016-2021

USD million	2016	2017	2018	2019	2020	2021
Premium Fragrances	Data removed from sample					
- Premium Men's Fragrances						
- Premium Women's Fragrances						
- Premium Unisex Fragrances						
- Premium Fragrance Sets/Kits						
Mass Fragrances						
- Mass Men's Fragrances						
- Mass Women's Fragrances						
- Mass Unisex Fragrances						
- Mass Fragrance Sets/Kits						
Fragrances						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 58 Sales of Fragrances by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total

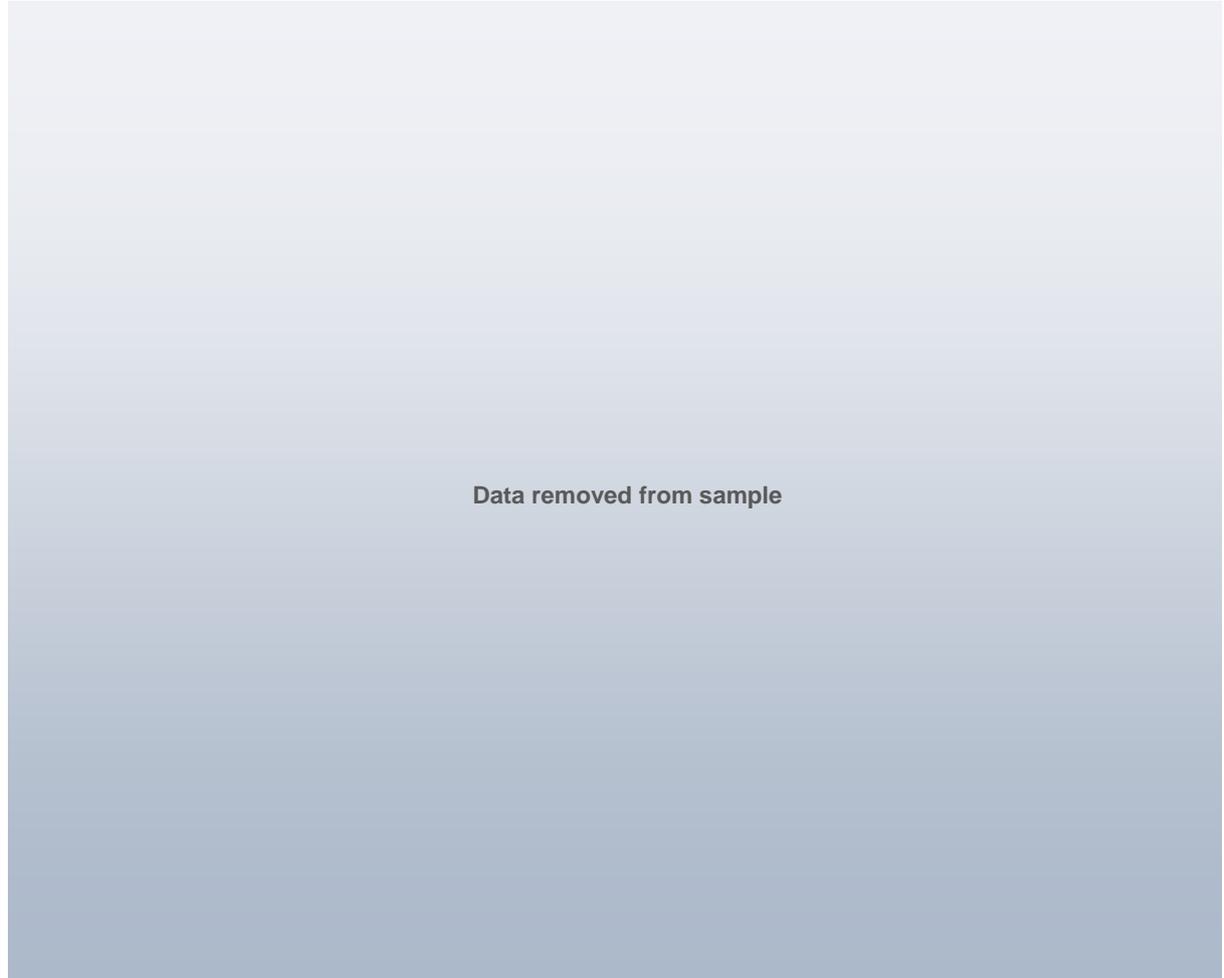
- Premium Fragrances
 - Premium Men's Fragrances
 - Premium Women's Fragrances
 - Premium Unisex Fragrances
 - Premium Fragrance Sets/Kits
- Mass Fragrances
 - Mass Men's Fragrances
 - Mass Women's Fragrances
 - Mass Unisex Fragrances
 - Mass Fragrance Sets/Kits
- Fragrances



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 59 NBO Company Shares of Fragrances: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 60 LBN Brand Shares of Fragrances: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 61 LBN Brand Shares of Premium Men's Fragrances: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 62 LBN Brand Shares of Premium Women's Fragrances: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 63 Forecast Sales of Fragrances by Category: Value 2021-2026

USD million	2021	2022	2023	2024	2025	2026
Premium Fragrances	Data removed from sample					
- Premium Men's Fragrances						
- Premium Women's Fragrances						
- Premium Unisex Fragrances						
- Premium Fragrance Sets/Kits						
Mass Fragrances						
- Mass Men's Fragrances						
- Mass Women's Fragrances						
- Mass Unisex Fragrances						
- Mass Fragrance Sets/Kits						
Fragrances						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

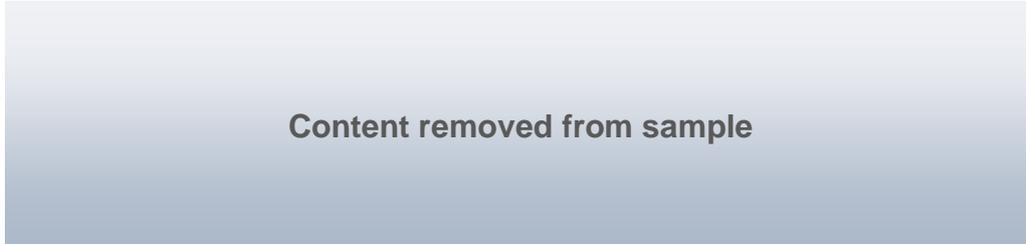
Table 64 Forecast Sales of Fragrances by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Premium Fragrances	Data removed from sample		
- Premium Men's Fragrances			
- Premium Women's Fragrances			
- Premium Unisex Fragrances			
- Premium Fragrance Sets/Kits			
Mass Fragrances			
- Mass Men's Fragrances			
- Mass Women's Fragrances			
- Mass Unisex Fragrances			
- Mass Fragrance Sets/Kits			
Fragrances			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

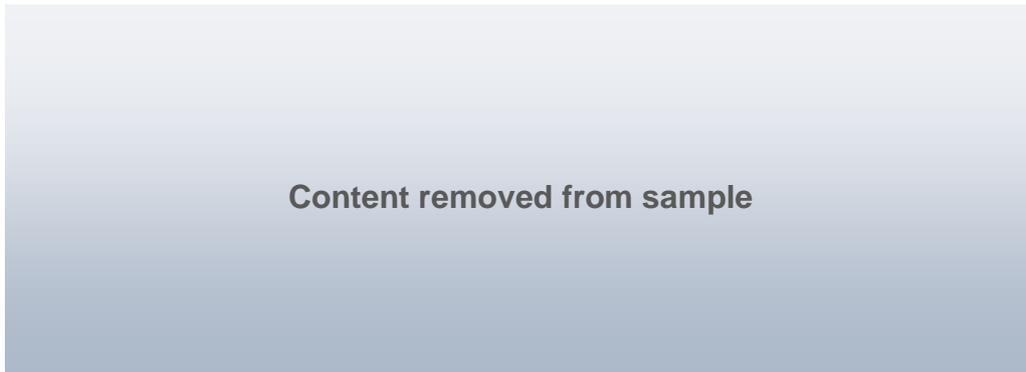
HAIR CARE IN THE US - CATEGORY ANALYSIS

KEY DATA FINDINGS

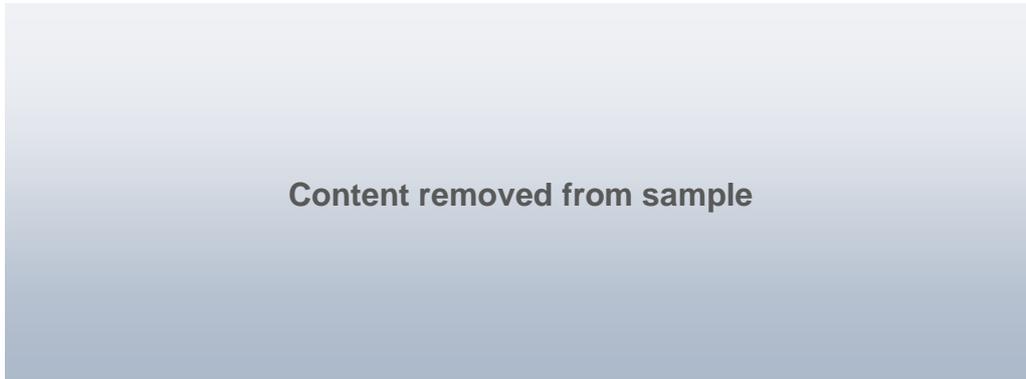


2021 DEVELOPMENTS

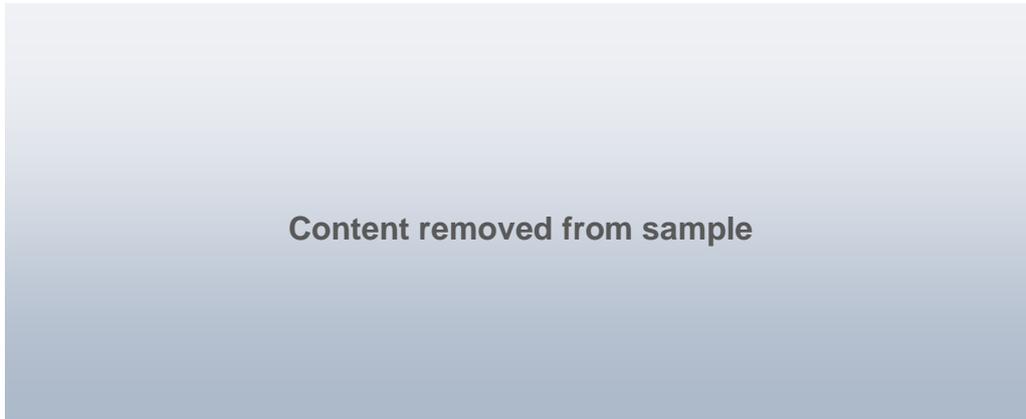
Salon professional hair care rebounds following the acceleration of purchases outside the salon



Colourants sees A dip in demand as DIY hair care loses momentum but continues to see innovation

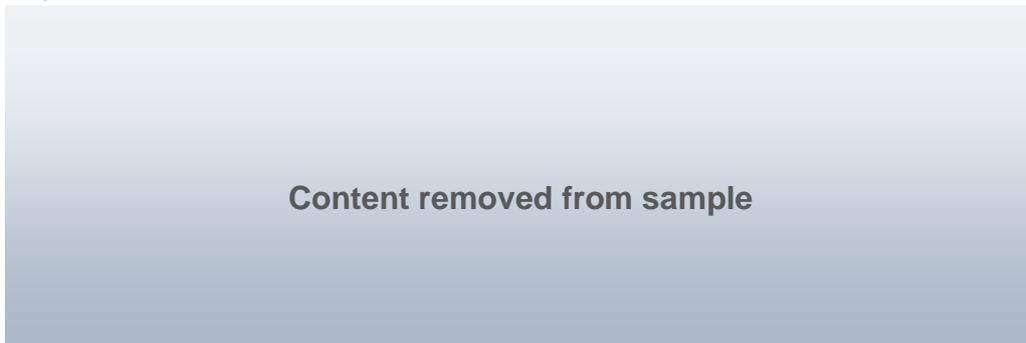


Procter & Gamble moves into premium hair care with the acquisition of OUAİ

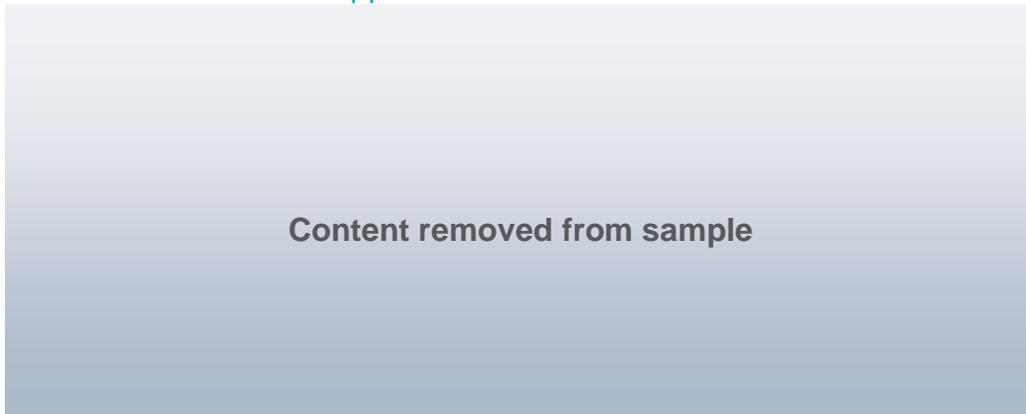


PROSPECTS AND OPPORTUNITIES

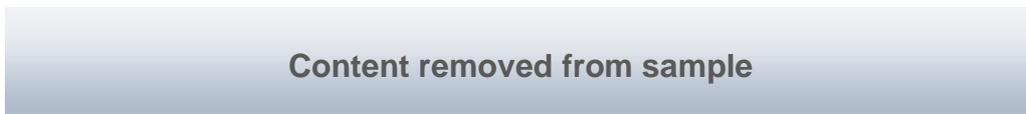
Liquid hair to be the latest skinification trend

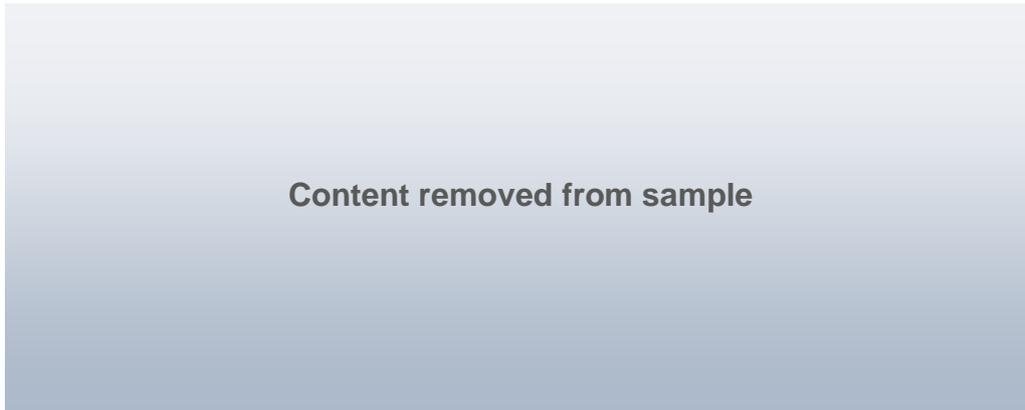


Skin care brands seek opportunities in hair care



Celebrity-owned hair care brands look to gain traction amongst fans and consumers on social media





CATEGORY DATA

Table 65 Sales of Hair Care by Category: Value 2016-2021

USD million	2016	2017	2018	2019	2020	2021
2-in-1 Products	Data removed from sample					
Colourants						
Conditioners and Treatments						
Hair Loss Treatments						
Perms and Relaxants						
Salon Professional Hair Care						
Shampoos						
- Medicated Shampoos						
- Standard Shampoos						
Styling Agents						
Hair Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 66 Sales of Hair Care by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
2-in-1 Products	Data removed from sample		
Colourants			
Conditioners and Treatments			
Hair Loss Treatments			
Perms and Relaxants			
Salon Professional Hair Care			
Shampoos			
- Medicated Shampoos			
- Standard Shampoos			
Styling Agents			
Hair Care			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 67 Sales of Hair Care by Premium vs Mass: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Premium	Data removed from sample					
Mass						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 68 NBO Company Shares of Hair Care: % Value 2017-2021

% retail value rsp	2017	2018	2019	2020	2021
Company	Data removed from sample				

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 69 NBO Company Shares of Salon Professional Hair Care: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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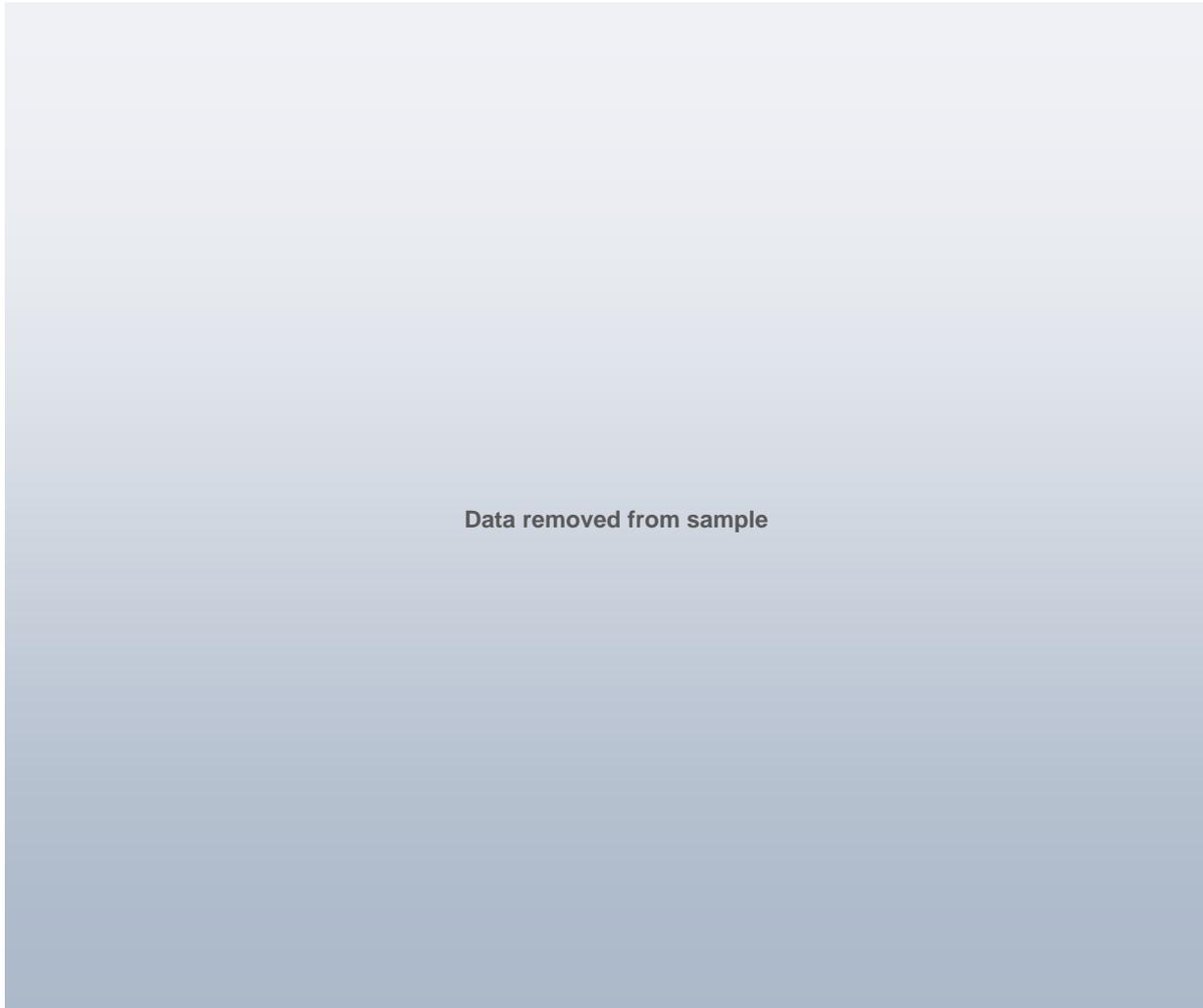
Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 70 LBN Brand Shares of Hair Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------

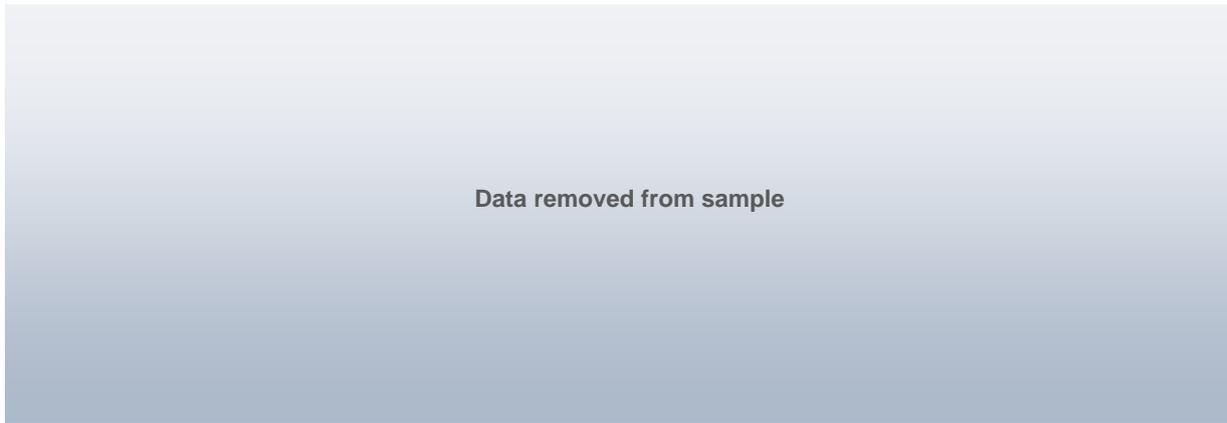
Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 71 LBN Brand Shares of Colourants: % Value 2018-2021

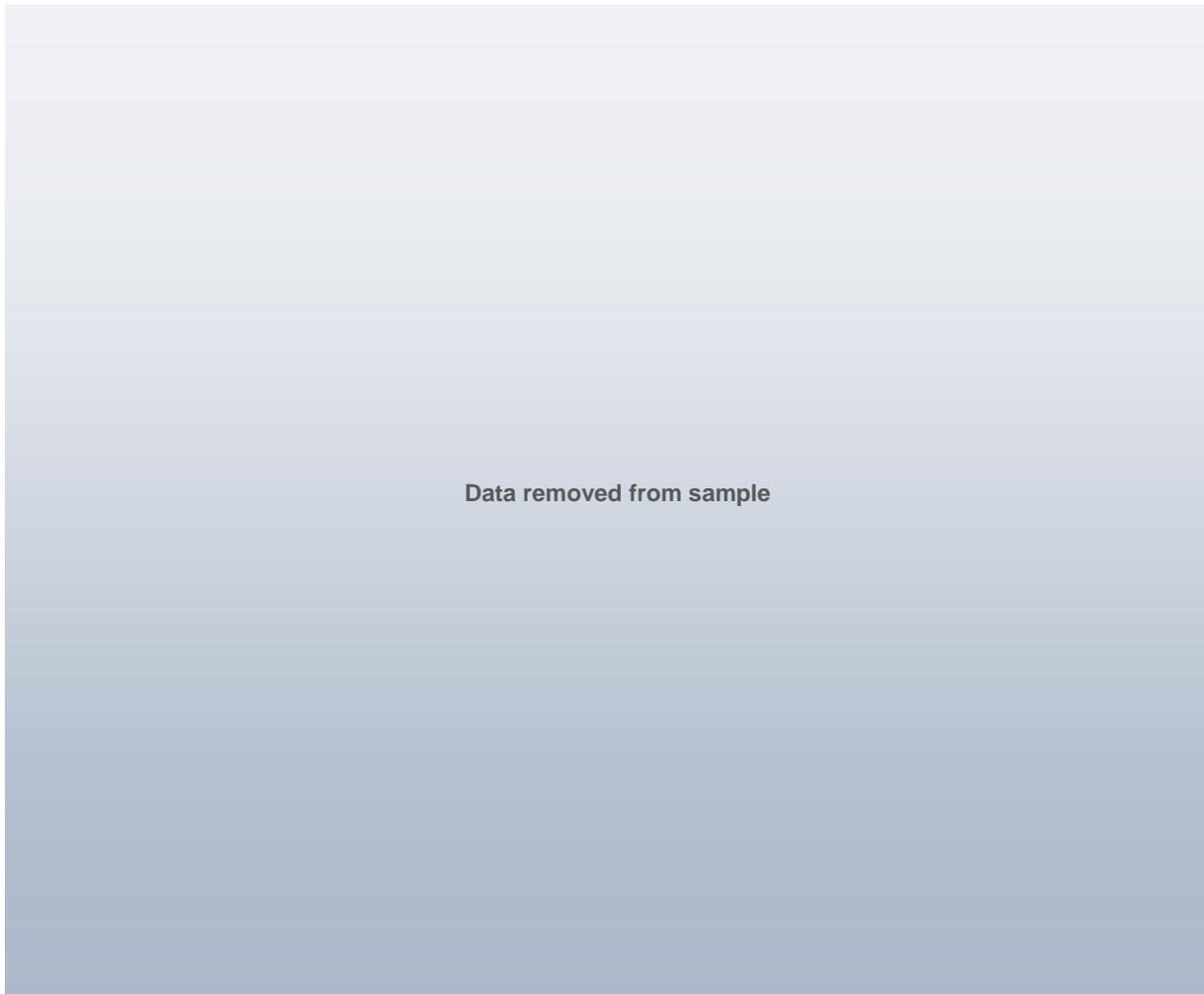
% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 72 LBN Brand Shares of Salon Professional Hair Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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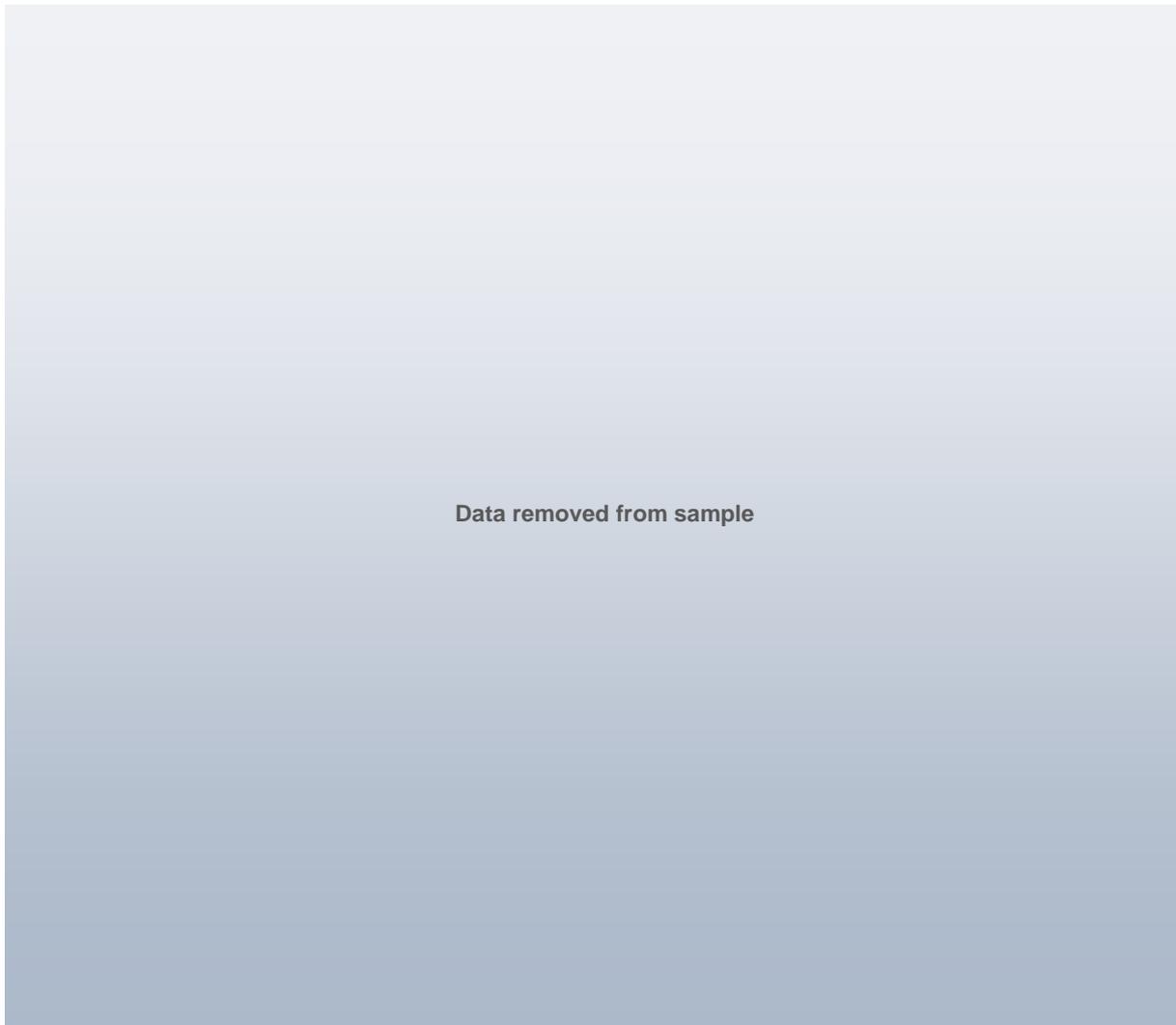




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 73 LBN Brand Shares of Styling Agents: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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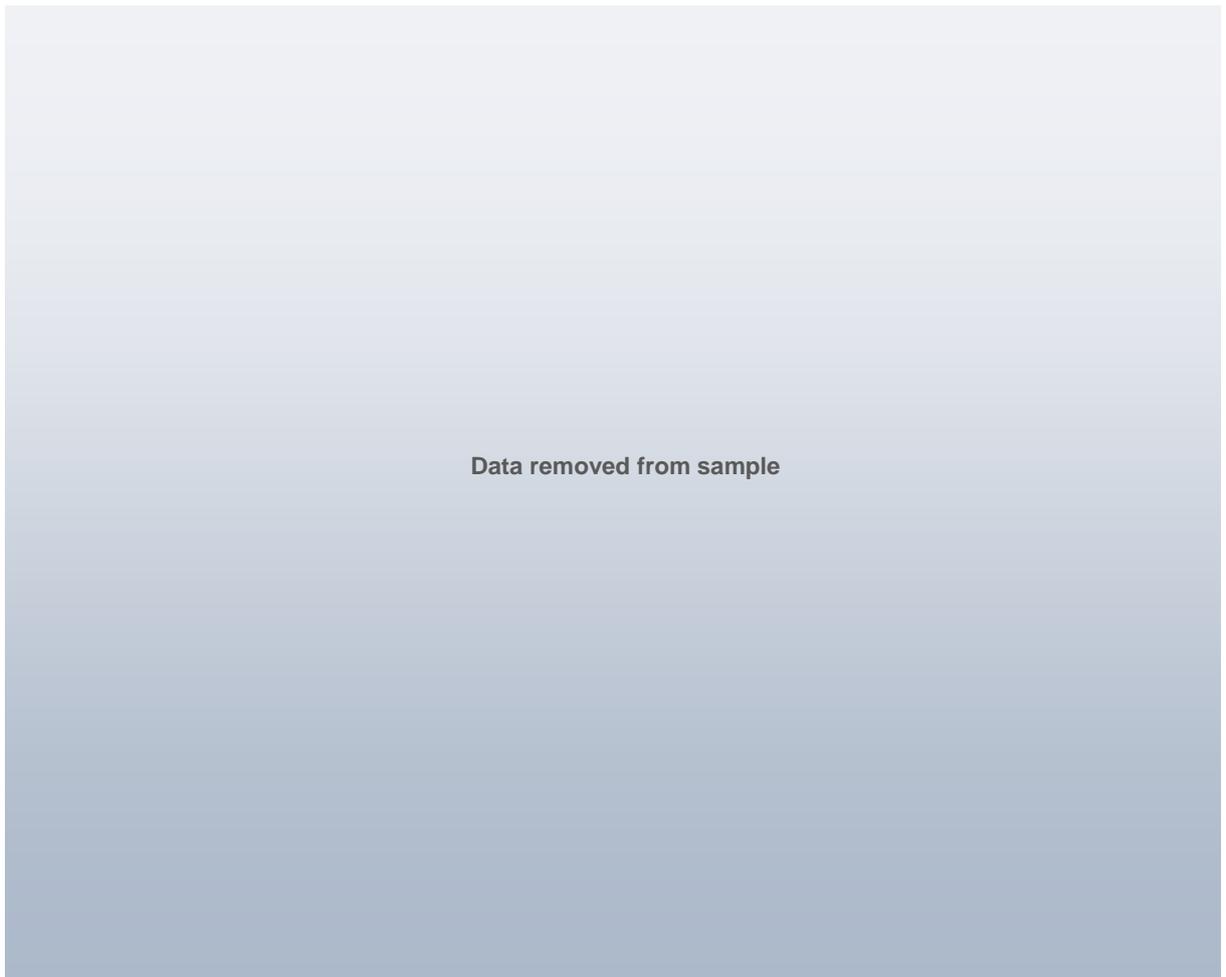




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 74 LBN Brand Shares of Premium Hair Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------





Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

USD million	2021	2022	2023	2024	2025	2026
2-in-1 Products	Data removed from sample					
Colourants						
Conditioners and Treatments						
Hair Loss Treatments						
Perms and Relaxants						
Salon Professional Hair Care						
Shampoos						
- Medicated Shampoos						
- Standard Shampoos						
Styling Agents						
Hair Care						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
2-in-1 Products	Data removed from sample		
Colourants			
Conditioners and Treatments			
Hair Loss Treatments			
Perms and Relaxants			
Salon Professional Hair Care			
Shampoos			
- Medicated Shampoos			
- Standard Shampoos			
Styling Agents			
Hair Care			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

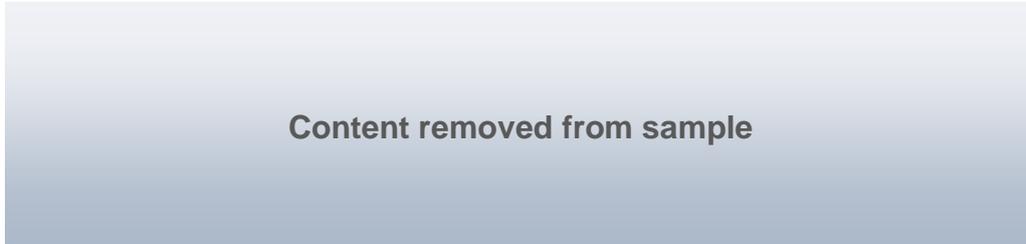
Table 77 Forecast Sales of Hair Care by Premium vs Mass: % Value 2021-2026

% retail value rsp	2021	2022	2023	2024	2025	2026
Premium	Data removed from sample					
Mass						
Total						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

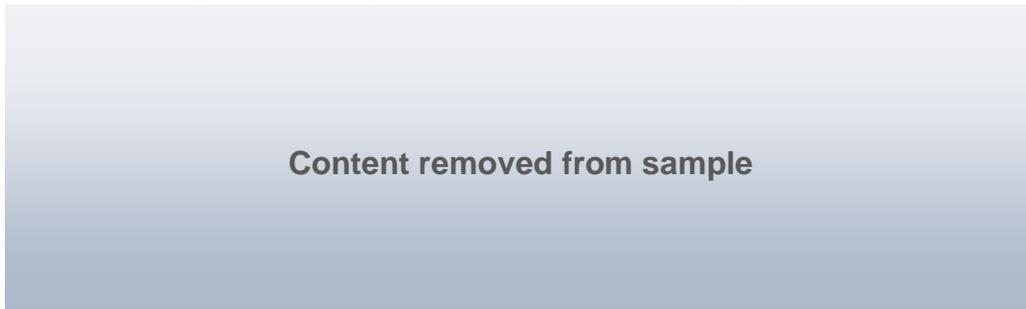
MEN'S GROOMING IN THE US - CATEGORY ANALYSIS

KEY DATA FINDINGS

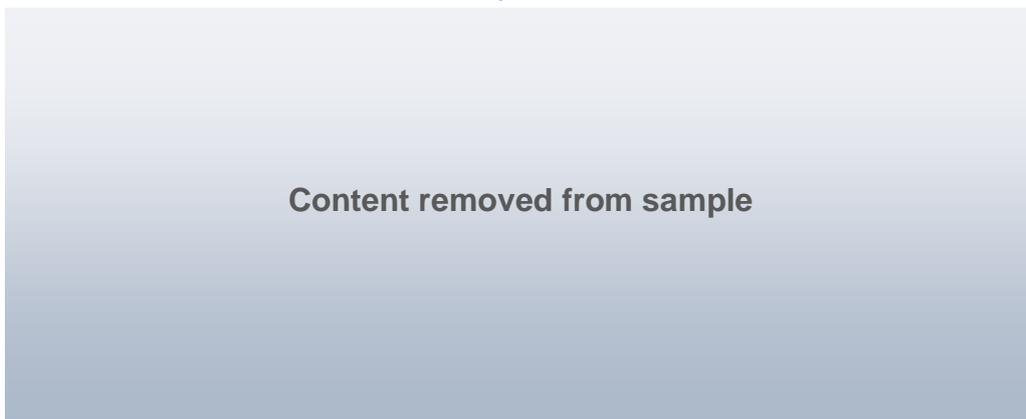


2021 DEVELOPMENTS

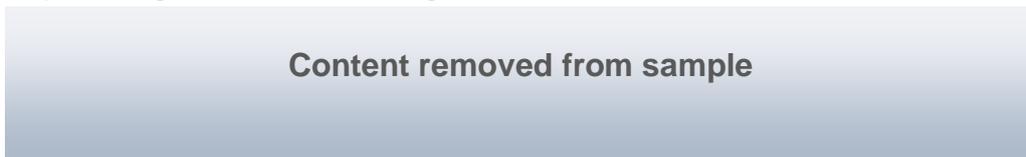
Men's shaving sees new growth for the first time in years



Brands seek to redefine masculinity



Explosive growth in men's fragrances



Content removed from sample

PROSPECTS AND OPPORTUNITIES

Unisex brands increasingly used by men

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Small brands establish unique identities

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Men's brands embrace the self-care philosophy

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CATEGORY DATA

Table 78 Sales of Men's Grooming by Category: Value 2016-2021

USD million	2016	2017	2018	2019	2020	2021
Men's Shaving	Data removed from sample					
- Men's Post-Shave						
- Men's Pre-Shave						
- Men's Razors and Blades						
Men's Toiletries						
- Men's Bath and Shower						
-- Premium Men's Bath and Shower						
-- Mass Men's Bath and Shower						
- Men's Deodorants						
-- Premium Men's Deodorants						
-- Mass Men's Deodorants						
- Men's Hair Care						
-- Premium Men's Hair Care						
-- Mass Men's Hair Care						
- Men's Skin Care						
-- Premium Men's Skin Care						
-- Mass Men's Skin Care						
Men's Fragrances						
- Premium Men's Fragrances						
- Mass Men's Fragrances						
Men's Grooming						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 79 Sales of Men's Grooming by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Men's Shaving	Data removed from sample		
- Men's Post-Shave			
- Men's Pre-Shave			
- Men's Razors and Blades			
Men's Toiletries			
- Men's Bath and Shower			
-- Premium Men's Bath and Shower			
-- Mass Men's Bath and Shower			
- Men's Deodorants			
-- Premium Men's Deodorants			
-- Mass Men's Deodorants			
- Men's Hair Care			
-- Premium Men's Hair Care			
-- Mass Men's Hair Care			
- Men's Skin Care			

- Premium Men's Skin Care
- Mass Men's Skin Care
- Men's Fragrances
- Premium Men's Fragrances
- Mass Men's Fragrances
- Men's Grooming

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 80 Sales of Men's Razors and Blades by Type: % Value Breakdown 2018-2021

% retail value rsp	2018	2019	2020	2021
Disposables	Data removed from sample			
Systems				
Systems - Razors				
Systems - Refill Blades				
Other Razors and Blades				
Total				

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 81 Sales of Men's Skin Care by Type: % Value Breakdown 2018-2021

% retail value rsp	2018	2019	2020	2021
Facial Care	Data removed from sample			
Body Care				
Hand Care				
Total				

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 82 NBO Company Shares of Men's Grooming: % Value 2017-2021

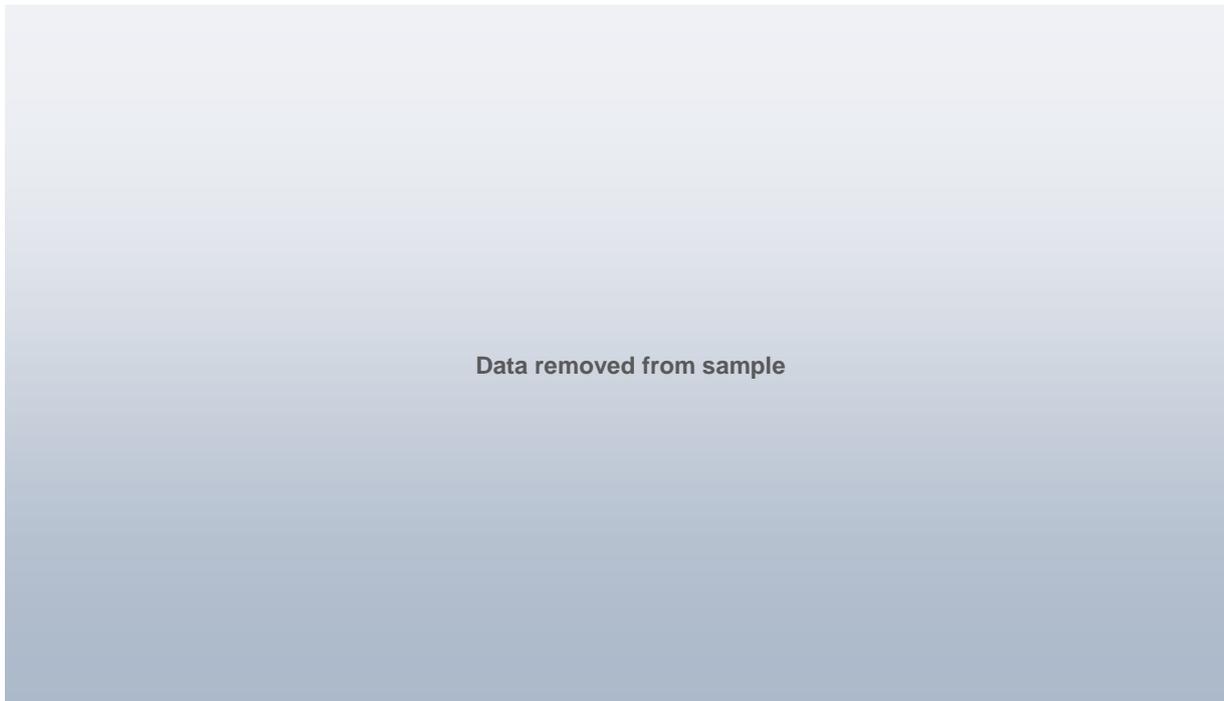
% retail value rsp	2017	2018	2019	2020	2021
Company	Data removed from sample				

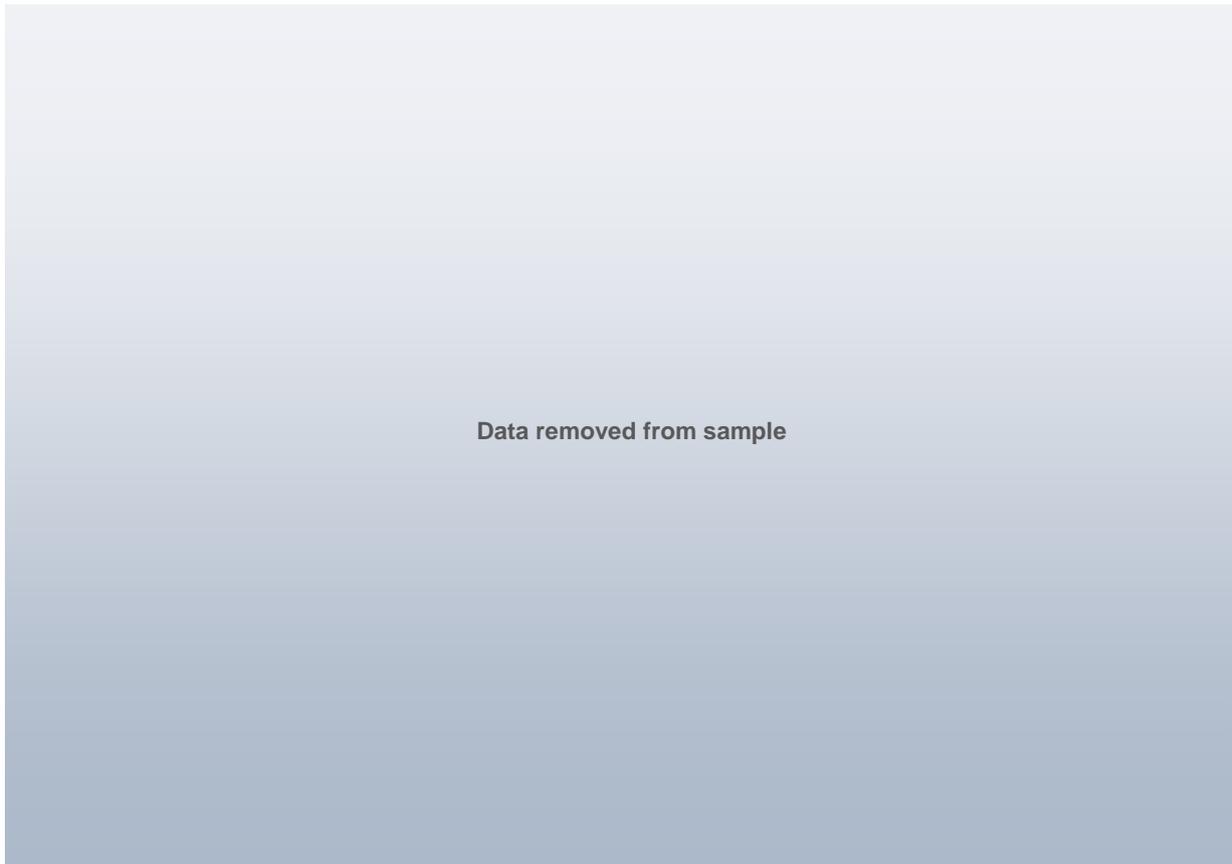


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 83 LBN Brand Shares of Men's Grooming: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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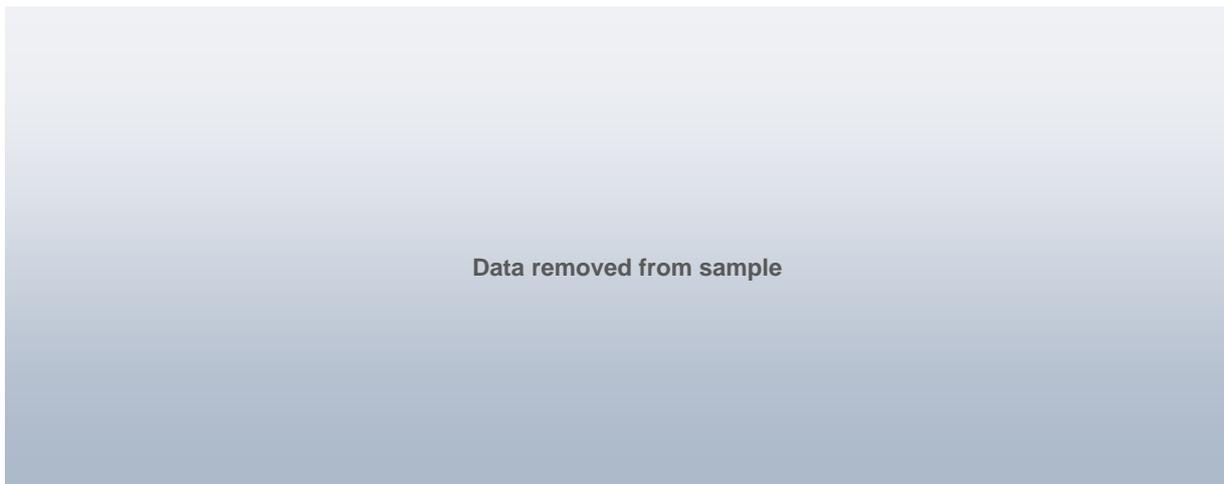




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 84 LBN Brand Shares of Men's Razors and Blades: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 85 Forecast Sales of Men's Grooming by Category: Value 2021-2026

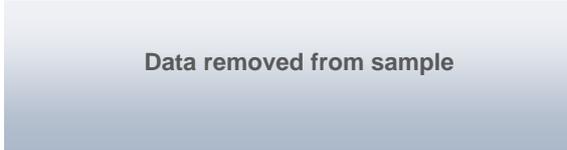
USD million	2021	2022	2023	2024	2025	2026
Men's Shaving	Data removed from sample					
- Men's Post-Shave						
- Men's Pre-Shave						
- Men's Razors and Blades						
Men's Toiletries						
- Men's Bath and Shower						
-- Premium Men's Bath and Shower						
-- Mass Men's Bath and Shower						
- Men's Deodorants						
-- Premium Men's Deodorants						
-- Mass Men's Deodorants						
- Men's Hair Care						
-- Premium Men's Hair Care						
-- Mass Men's Hair Care						
- Men's Skin Care						
-- Premium Men's Skin Care						
-- Mass Men's Skin Care						
Men's Fragrances						
- Premium Men's Fragrances						
- Mass Men's Fragrances						
Men's Grooming						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 86 Forecast Sales of Men's Grooming by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Men's Shaving	Data removed from sample		
- Men's Post-Shave			
- Men's Pre-Shave			
- Men's Razors and Blades			
Men's Toiletries			
- Men's Bath and Shower			
-- Premium Men's Bath and Shower			
-- Mass Men's Bath and Shower			
- Men's Deodorants			
-- Premium Men's Deodorants			
-- Mass Men's Deodorants			
- Men's Hair Care			
-- Premium Men's Hair Care			
-- Mass Men's Hair Care			
- Men's Skin Care			
-- Premium Men's Skin Care			

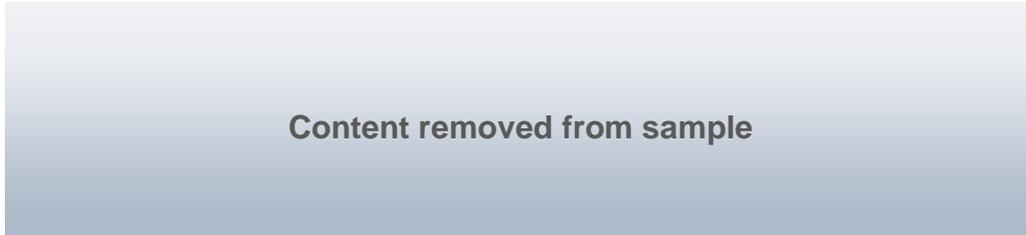
- Mass Men's Skin Care
- Men's Fragrances
- Premium Men's Fragrances
- Mass Men's Fragrances
- Men's Grooming



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

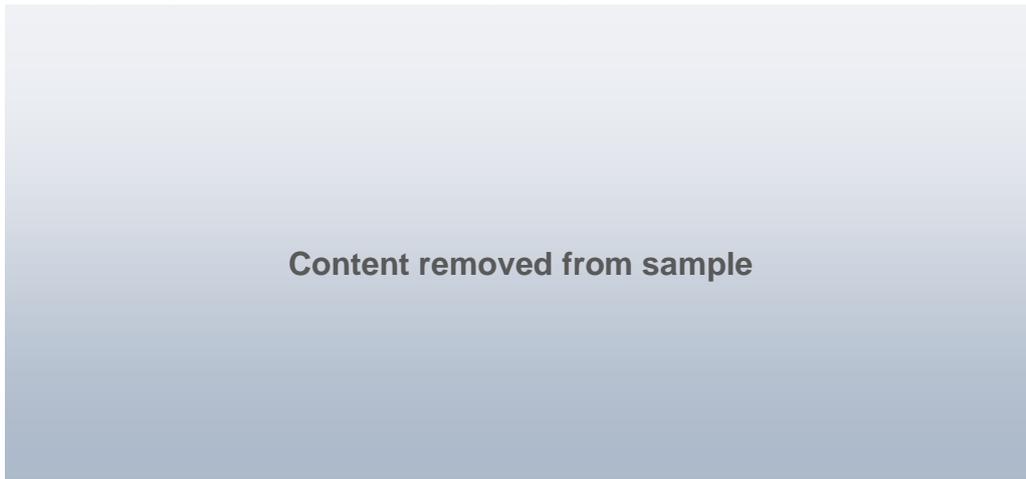
ORAL CARE IN THE US - CATEGORY ANALYSIS

KEY DATA FINDINGS

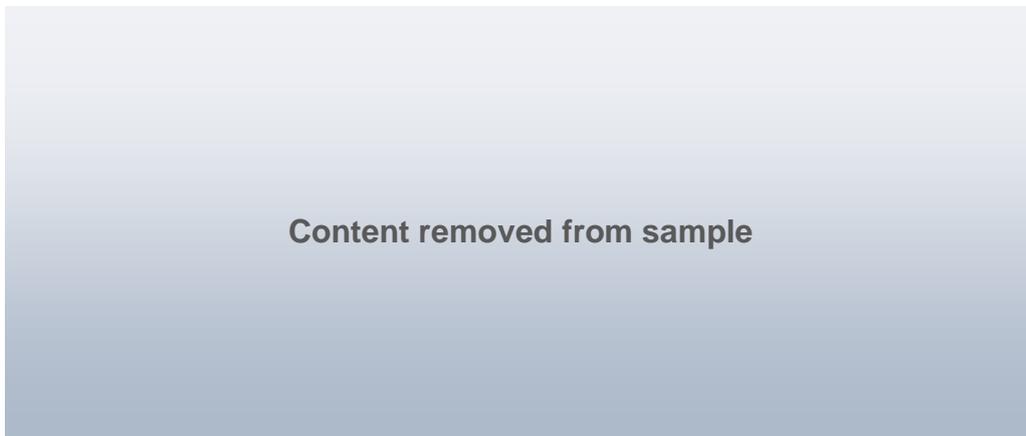


2021 DEVELOPMENTS

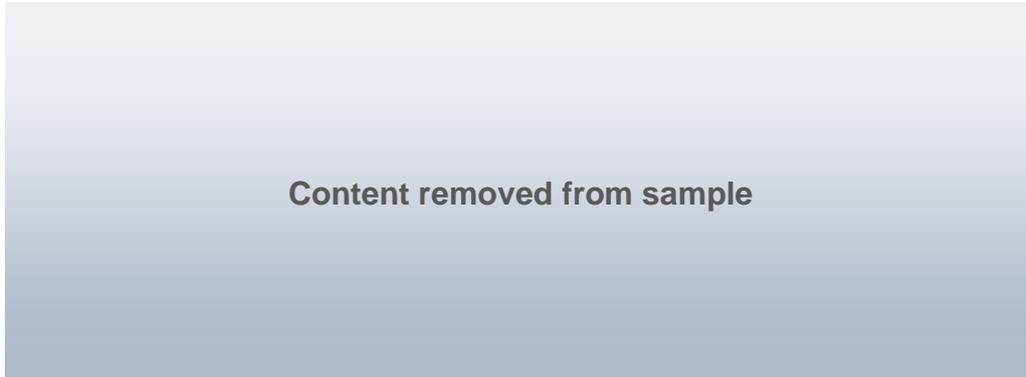
CO. by Colgate tackles oral beauty for gen Z consumers



Consumers swap out professional teeth whitening services for at-home kits

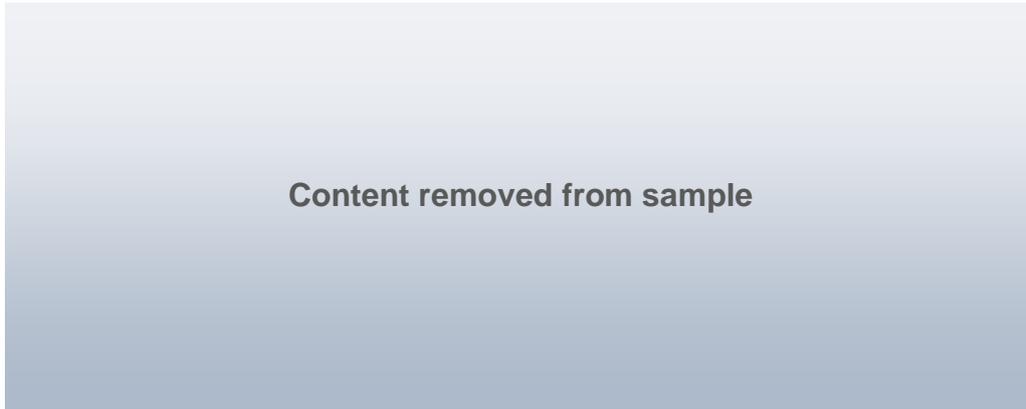


Manual toothbrushes sees A bump in demand as replaceable heads gain traction

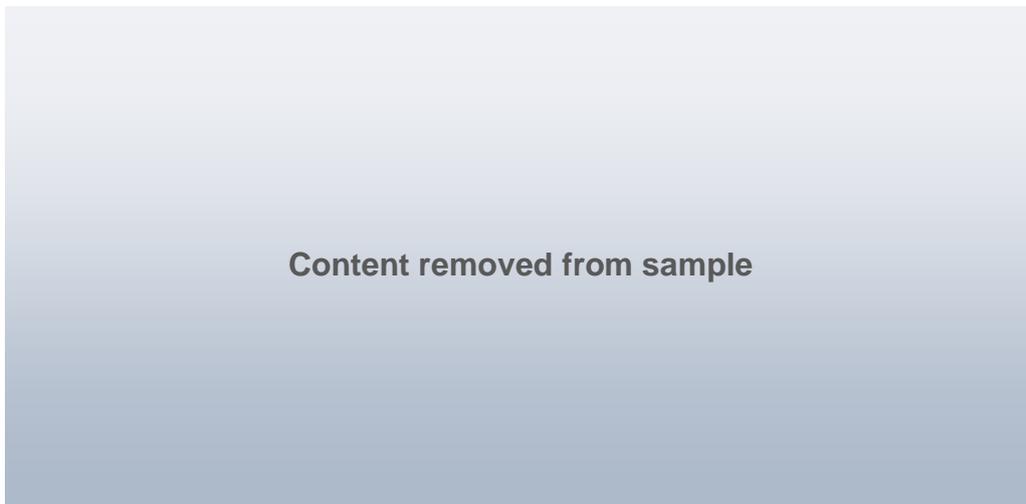


PROSPECTS AND OPPORTUNITIES

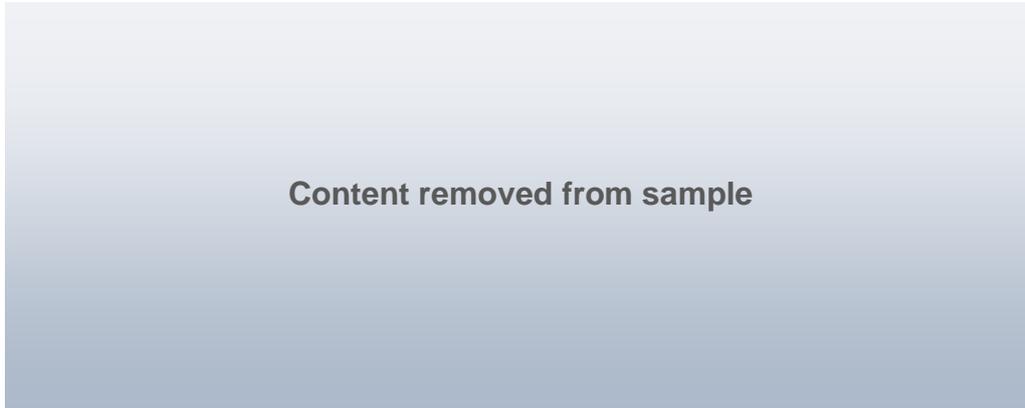
Sustainability in packaging and format top-of-mind for oral care brands



As oral care looks to establish itself in the beauty space, so strategies should change



Prebiotic toothpaste looks to strike A conversation on beneficial bacteria



CATEGORY DATA

Table 87 Sales of Oral Care by Category: Value 2016-2021

USD million	2016	2017	2018	2019	2020	2021
Dental Floss	Data removed from sample					
Denture Care						
- Denture Cleansers						
- Denture Fixatives						
Mouth Fresheners						
Mouthwashes/Dental Rinses						
Tooth Whiteners						
Toothbrushes						
- Manual Toothbrushes						
- Power Toothbrushes						
Toothpaste						
Oral Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Oral Care total excludes the category total for manual and power toothbrushes

Table 88 Sales of Oral Care by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Dental Floss	Data removed from sample		
Denture Care			
- Denture Cleansers			
- Denture Fixatives			
Mouth Fresheners			
Mouthwashes/Dental Rinses			
Tooth Whiteners			
Toothbrushes			
- Manual Toothbrushes			
- Power Toothbrushes			

Toothpaste Oral Care	Data removed from sample
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources	
Note: Oral Care total excludes the category total for manual and power toothbrushes	

Table 89 Sales of Toothbrushes by Category: Value 2016-2021

USD million	2016	2017	2018	2019	2020	2021
Toothbrushes - Manual Toothbrushes - Power Toothbrushes -- Battery Toothbrushes --- Battery Toothbrush Replacement Heads --- Battery Toothbrush Units -- Electric Toothbrushes --- Electric Toothbrush Replacement Heads --- Electric Toothbrush Units	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 90 Sales of Toothbrushes by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Toothbrushes - Manual Toothbrushes - Power Toothbrushes -- Battery Toothbrushes --- Battery Toothbrush Replacement Heads --- Battery Toothbrush Units -- Electric Toothbrushes --- Electric Toothbrush Replacement Heads --- Electric Toothbrush Units	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 91 Sales of Toothpaste by Type: % Value Breakdown 2017-2021

% retail value rsp	2017	2018	2019	2020	2021
Traditional/Standard/ Basic Total Care/Complete Care Whitening Fresh Breath	Data removed from sample				

Children's
Sensitive
Gum Health
Acid Wear/Enamel
Strengthening
Others
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 92 NBO Company Shares of Oral Care: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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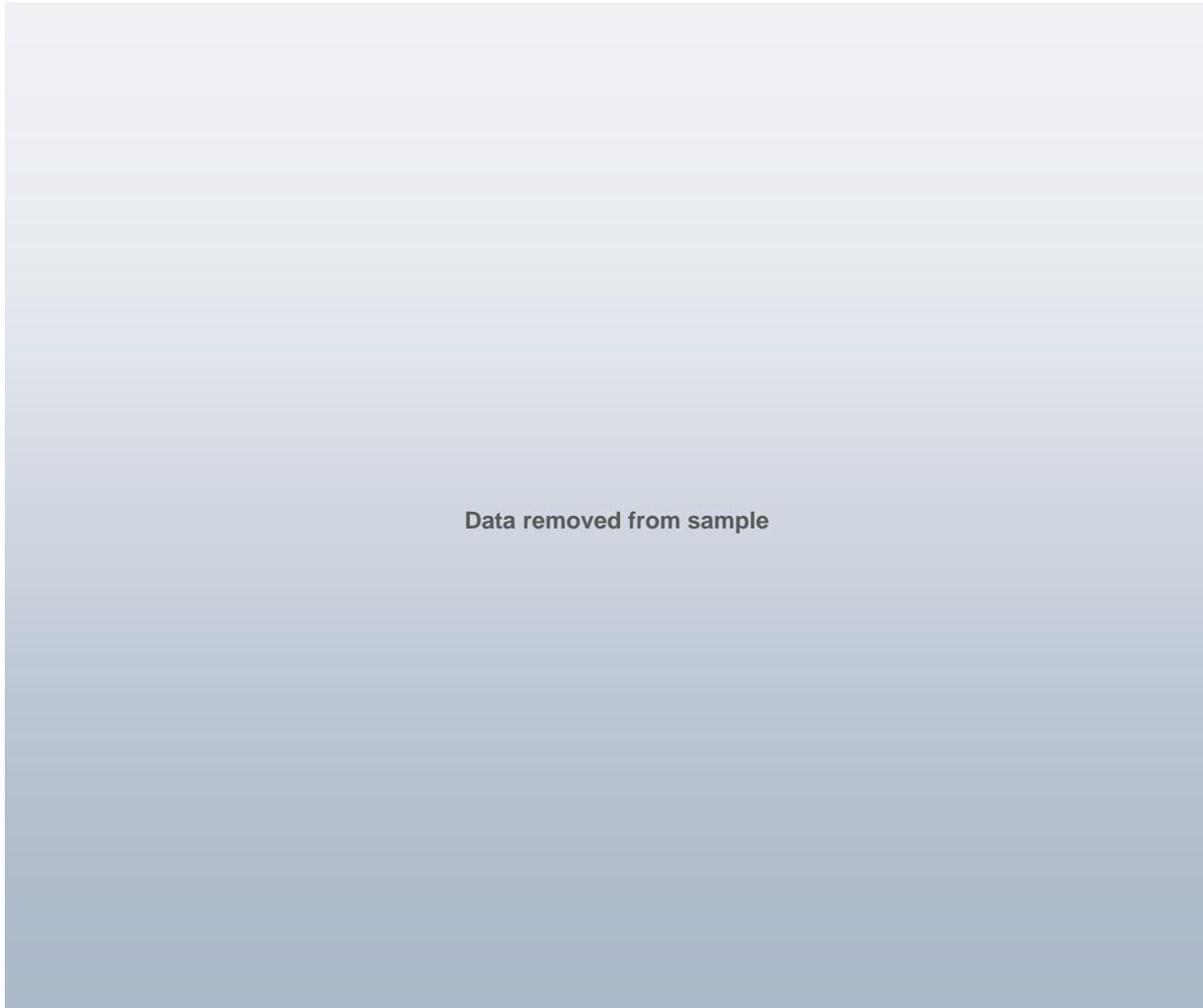
Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 93 LBN Brand Shares of Oral Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 94 LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 95 LBN Brand Shares of Toothpaste: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 96 Forecast Sales of Oral Care by Category: Value 2021-2026

USD million	2021	2022	2023	2024	2025	2026
Dental Floss	Data removed from sample					
Denture Care						
- Denture Cleansers						
- Denture Fixatives						
Mouth Fresheners						
Mouthwashes/Dental Rinses						
Tooth Whiteners						
Toothbrushes						
- Manual Toothbrushes						
- Power Toothbrushes						
Toothpaste						
Oral Care						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Oral Care total excludes the category total for manual and power toothbrushes

Table 97 Forecast Sales of Oral Care by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

- Dental Floss
- Denture Care
- Denture Cleansers
- Denture Fixatives
- Mouth Fresheners
- Mouthwashes/Dental Rinses
- Tooth Whiteners
- Toothbrushes
- Manual Toothbrushes
- Power Toothbrushes
- Toothpaste
- Oral Care



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

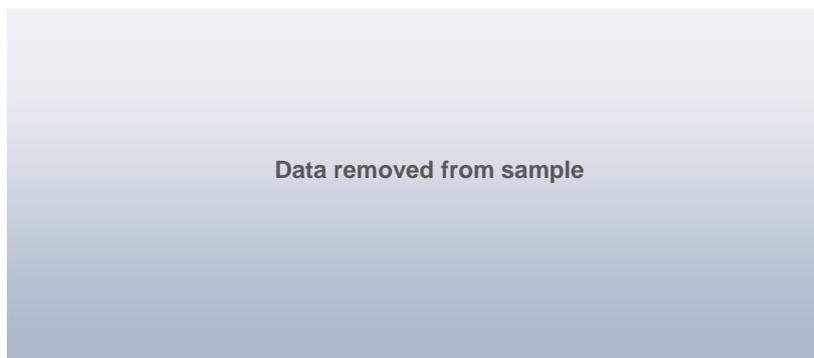
Note: Oral Care total excludes the category total for manual and power toothbrushes

Table 98 Forecast Sales of Toothbrushes by Category: Value 2021-2026

USD million

2021 2022 2023 2024 2025 2026

- Toothbrushes
- Manual Toothbrushes
- Power Toothbrushes
- Battery Toothbrushes
- Battery Toothbrush Replacement Heads
- Battery Toothbrush Units
- Electric Toothbrushes
- Electric Toothbrush Replacement Heads
- Electric Toothbrush Units



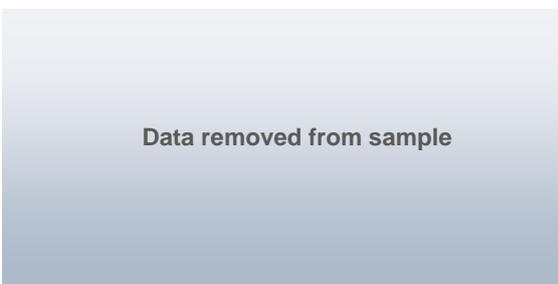
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 99 Forecast Sales of Toothbrushes by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

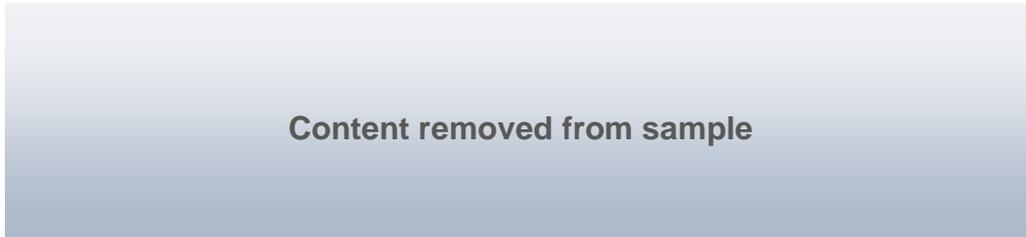
- Toothbrushes
- Manual Toothbrushes
- Power Toothbrushes
- Battery Toothbrushes
- Battery Toothbrush Replacement Heads
- Battery Toothbrush Units
- Electric Toothbrushes
- Electric Toothbrush Replacement Heads
- Electric Toothbrush Units



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

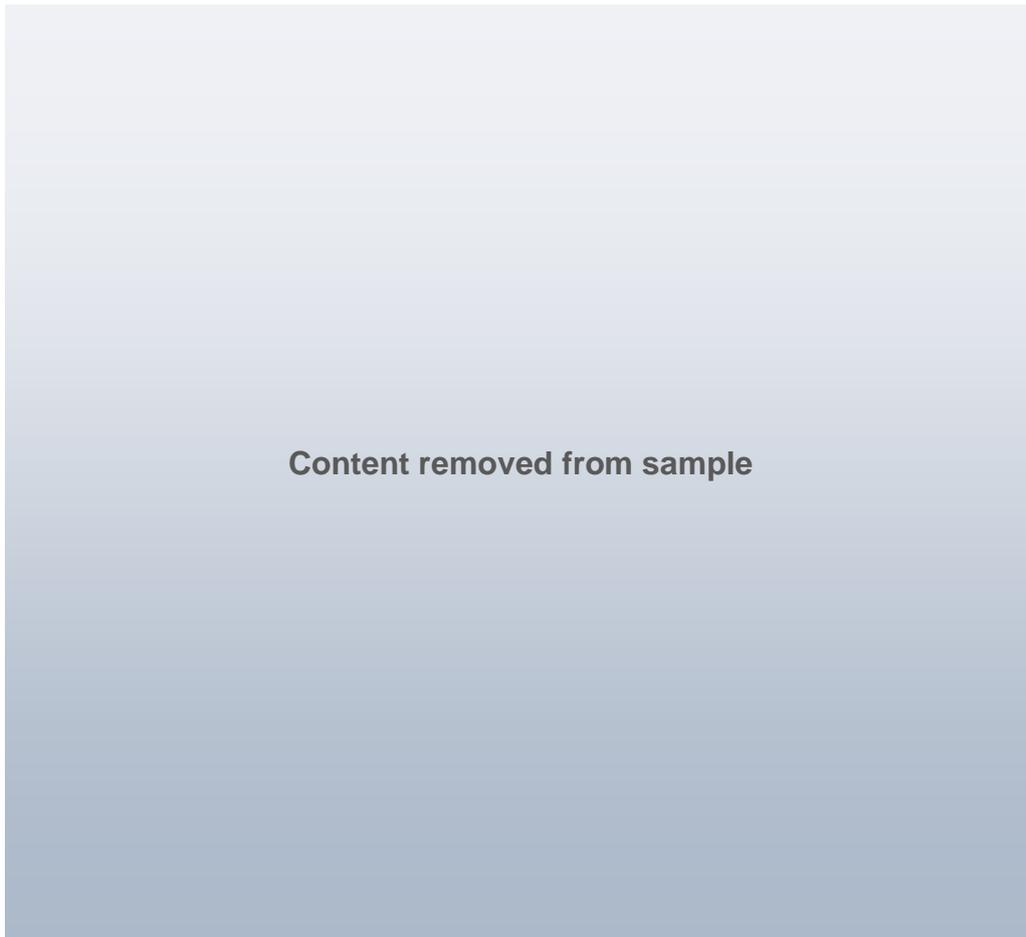
SKIN CARE IN THE US - CATEGORY ANALYSIS

KEY DATA FINDINGS

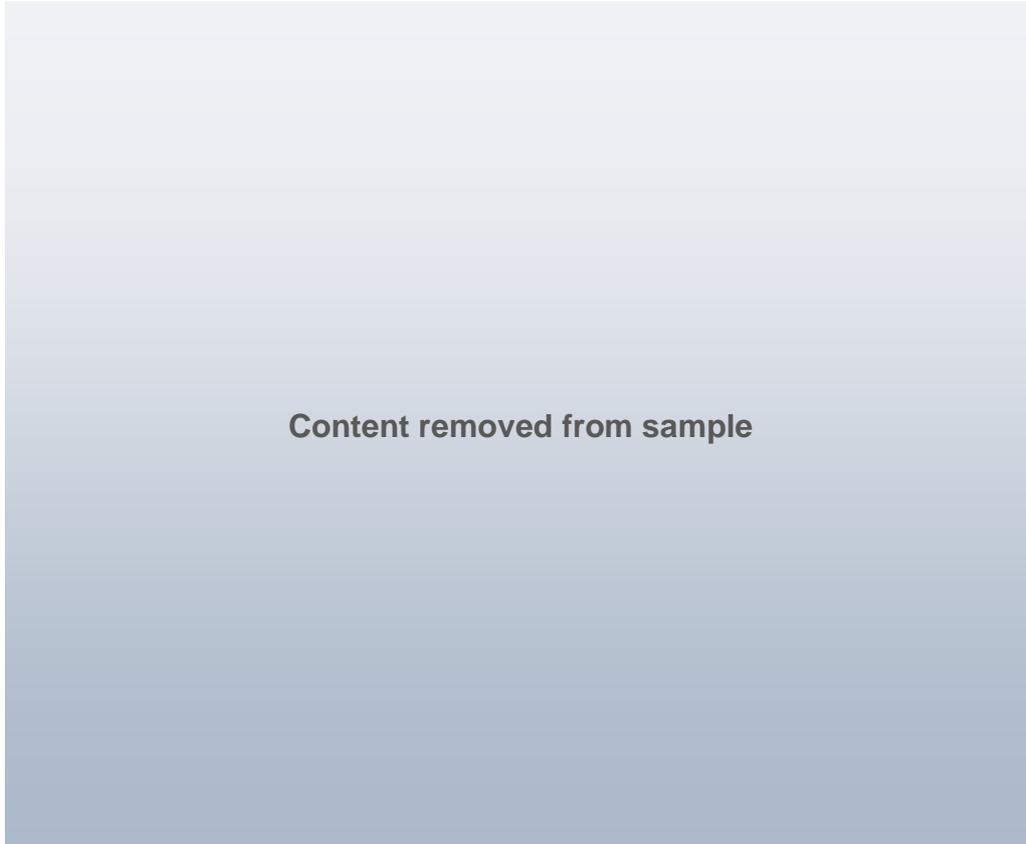


2021 DEVELOPMENTS

Self-care and skiminalism trends propel skin care in 2021



Innovation brings much-needed life to acne treatments and anti-agers



Attention turns towards ingredients as consumers seek tailored skin solutions



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PROSPECTS AND OPPORTUNITIES

Innovation and novelty will be required to maintain skin care's momentum

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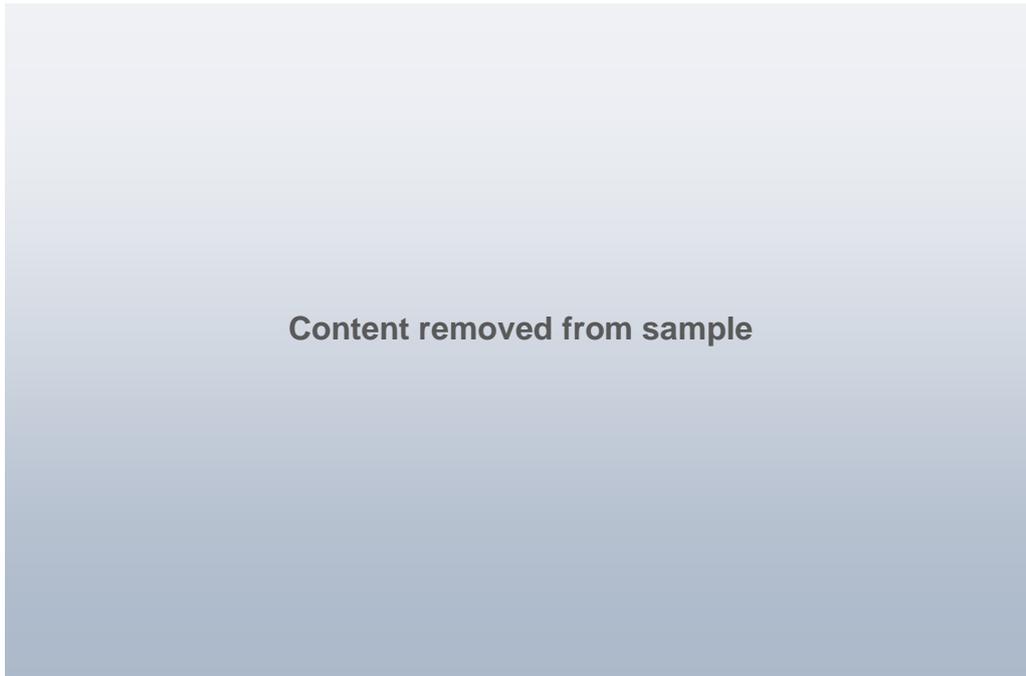
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Players should innovate in line with consumers' quest for wellness and efficacious products

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Investments in beauty apps to continue, as they empower consumers with educational content to find the right products

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CATEGORY DATA

Table 100 Sales of Skin Care by Category: Value 2016-2021

USD million	2016	2017	2018	2019	2020	2021
Body Care	Data removed from sample					
- Firming/Anti-Cellulite Body Care						
-- Premium Firming/Anti-Cellulite Body Care						
-- Mass Firming/Anti-Cellulite Body Care						
- General Purpose Body Care						
-- Premium General Purpose Body Care						
-- Mass General Purpose Body Care						
Facial Care						
- Acne Treatments						
-- Premium Acne Treatments						
-- Mass Acne Treatments						
- Face Masks						
-- Premium Face Masks						
-- Mass Face Masks						
- Facial Cleansers						
-- Liquid/Cream/Gel/Bar Cleansers						
--- Premium Liquid/Cream/Gel/Bar Cleansers						

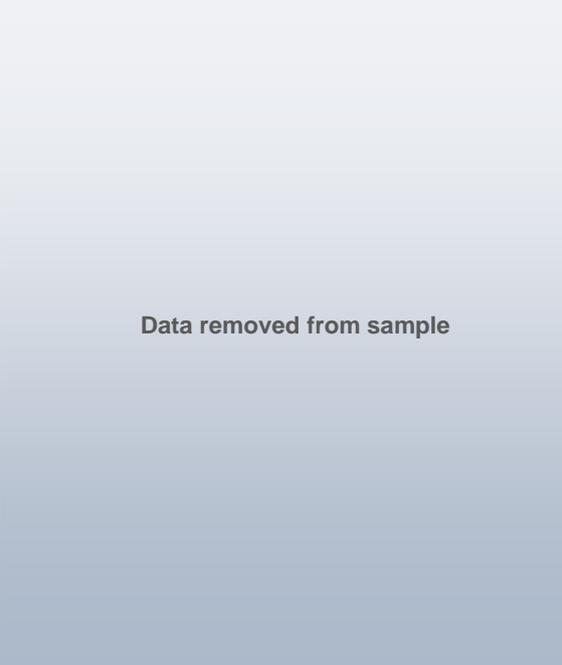
--- Mass Liquid/Cream/ Gel/Bar Cleansers	1,510.7	1,670.4	1,872.5	2,001.2	2,141.2	2,191.3
-- Facial Cleansing Wipes	Data removed from sample					
--- Premium Facial Cleansing Wipes						
--- Mass Facial Cleansing Wipes						
- Moisturisers And Treatments						
-- Basic Moisturisers						
--- Premium Basic Moisturisers						
--- Mass Basic Moisturisers						
-- Anti-Agers						
--- Premium Anti-Agers						
--- Mass Anti-Agers						
- Lip Care						
-- Premium Lip Care						
-- Mass Lip Care						
- Toners						
-- Premium Toners						
-- Mass Toners						
Hand Care						
- Premium Hand Care						
- Mass Hand Care						
Skin Care Sets/Kits						
- Premium Skin Care Sets/Kits						
- Mass Skin Care Sets/ Kits						
Skin Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 101 Sales of Skin Care by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Body Care	Data removed from sample		
- Firming/Anti-Cellulite Body Care			
-- Premium Firming/Anti-Cellulite Body Care			
-- Mass Firming/Anti-Cellulite Body Care			
- General Purpose Body Care			
-- Premium General Purpose Body Care			
-- Mass General Purpose Body Care			
Facial Care			
- Acne Treatments			
-- Premium Acne Treatments			
-- Mass Acne Treatments			
- Face Masks			
-- Premium Face Masks			
-- Mass Face Masks			
- Facial Cleansers			
-- Liquid/Cream/Gel/Bar Cleansers			
--- Premium Liquid/Cream/Gel/Bar Cleansers			

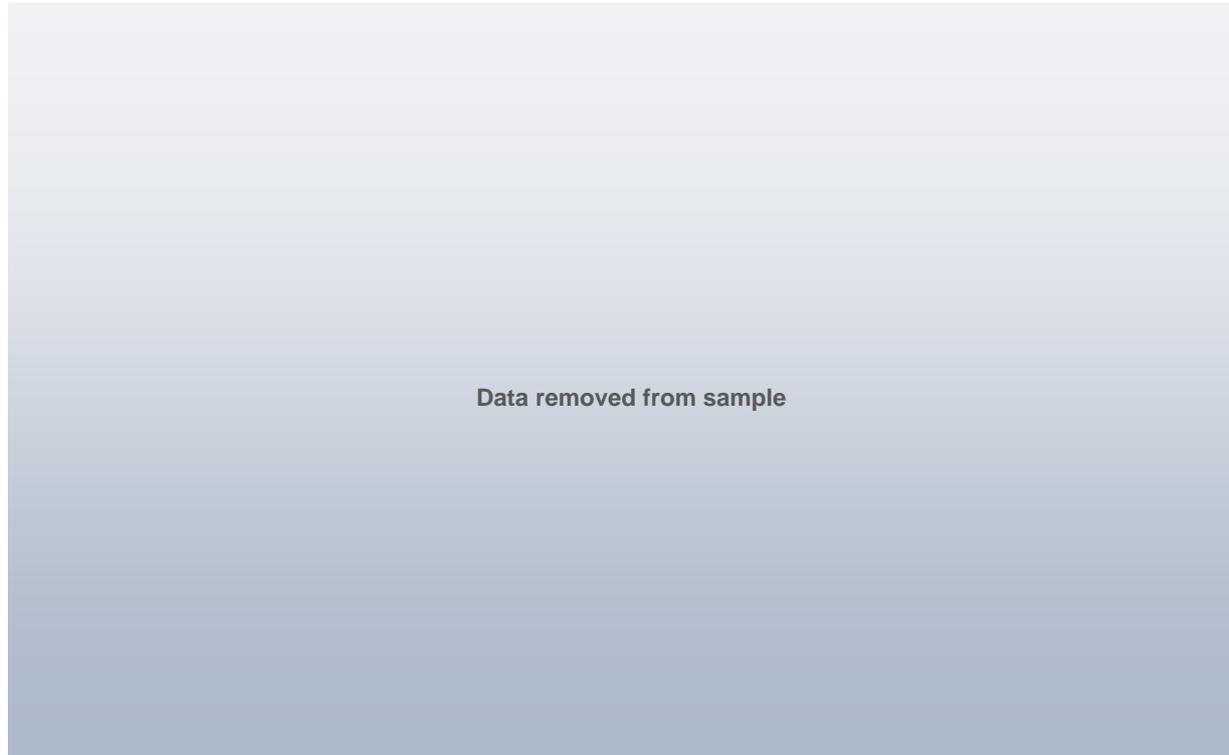
- Mass Liquid/Cream/Gel/Bar Cleansers
- Facial Cleansing Wipes
- Premium Facial Cleansing Wipes
- Mass Facial Cleansing Wipes
- Moisturisers And Treatments
- Basic Moisturisers
- Premium Basic Moisturisers
- Mass Basic Moisturisers
- Anti-Agers
- Premium Anti-Agers
- Mass Anti-Agers
- Lip Care
- Premium Lip Care
- Mass Lip Care
- Toners
- Premium Toners
- Mass Toners
- Hand Care
- Premium Hand Care
- Mass Hand Care
- Skin Care Sets/Kits
- Premium Skin Care Sets/Kits
- Mass Skin Care Sets/Kits
- Skin Care



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 102 NBO Company Shares of Skin Care: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------



Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 103 LBN Brand Shares of Skin Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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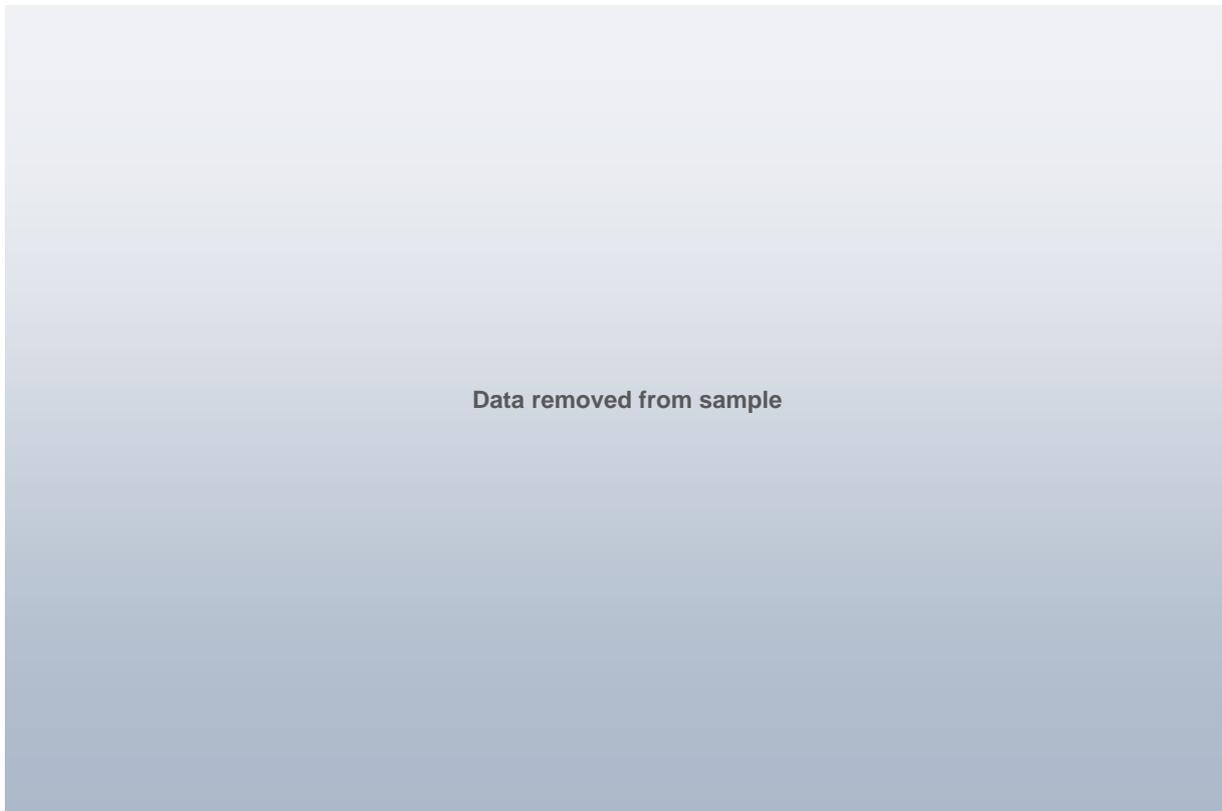
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 104 LBN Brand Shares of Basic Moisturisers: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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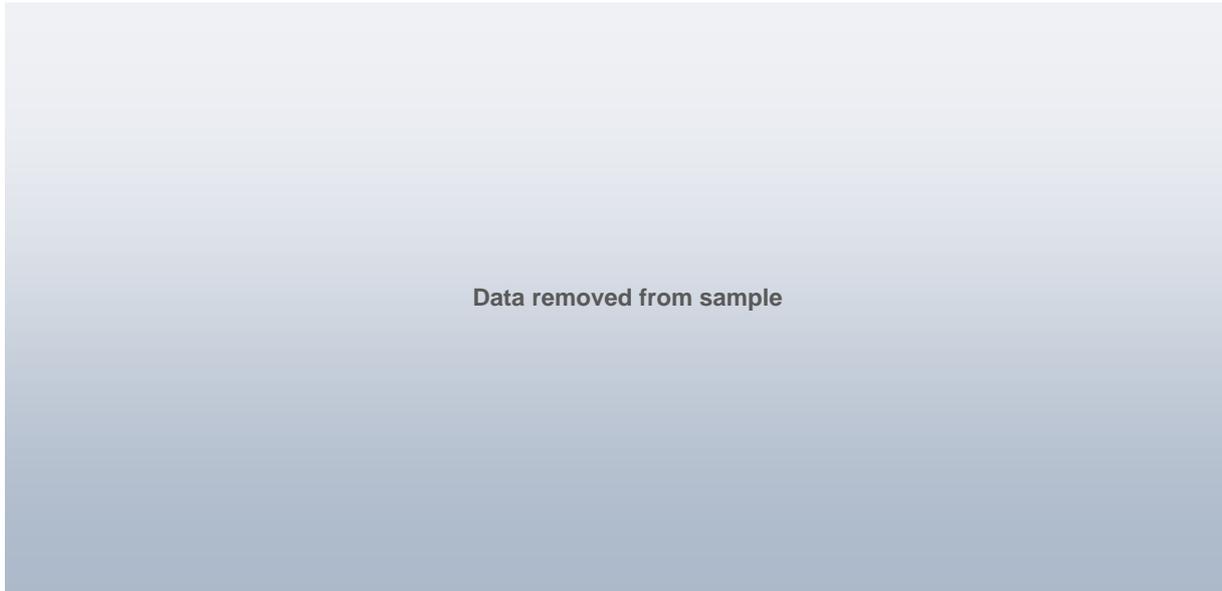


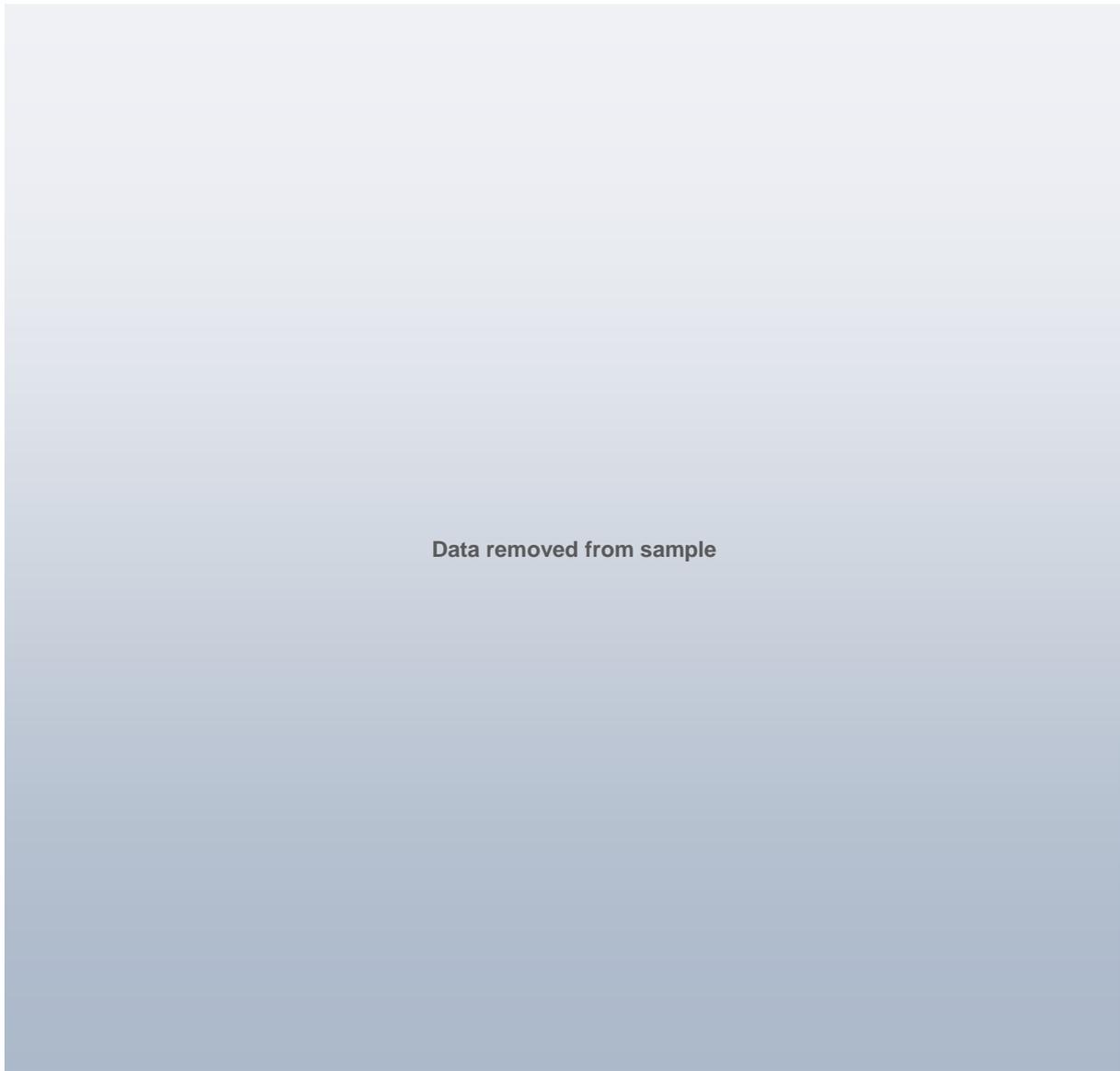


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 105 LBN Brand Shares of Anti-agers: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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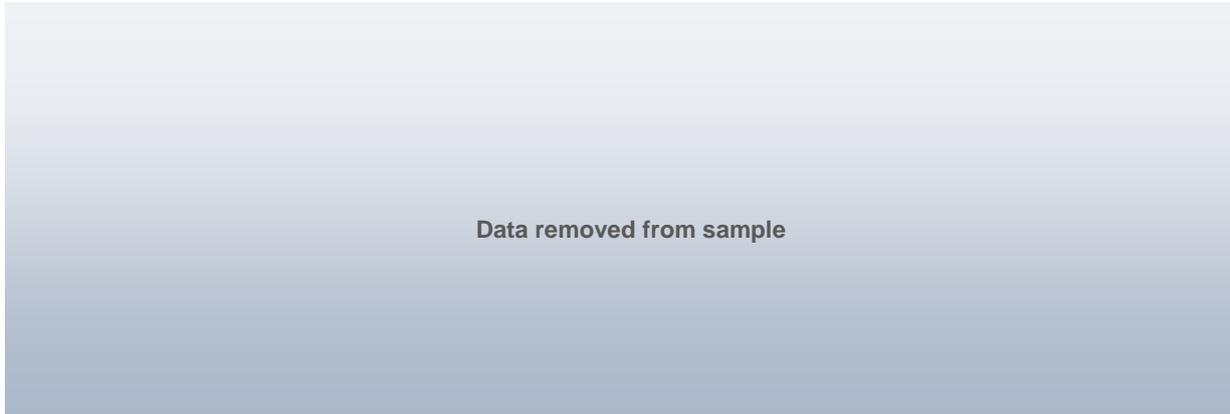




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 106 LBN Brand Shares of Firming/Anti-cellulite Body Care: % Value 2018-2021

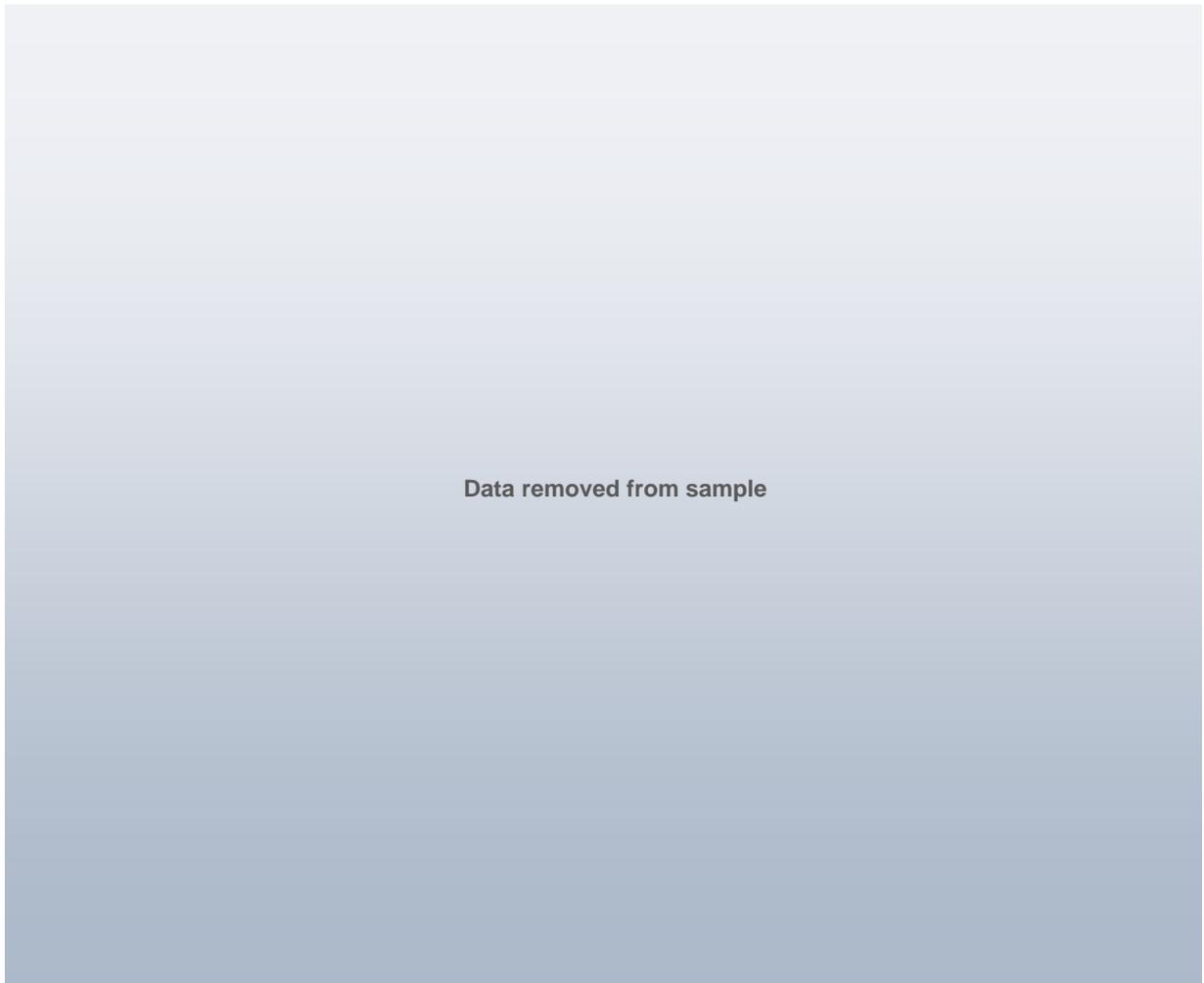
% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					

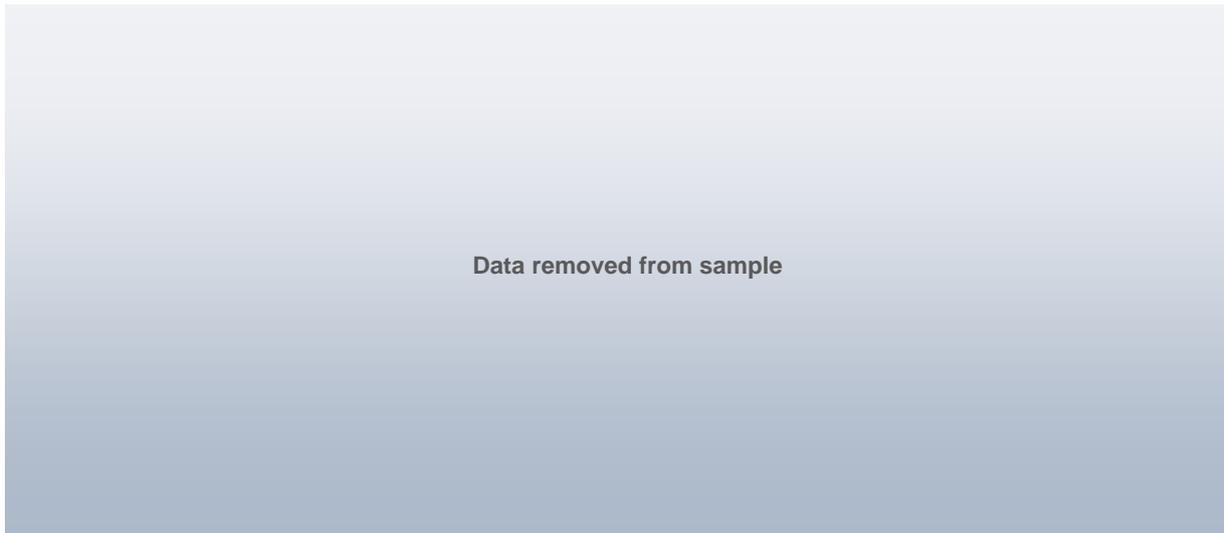


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 107 LBN Brand Shares of General Purpose Body Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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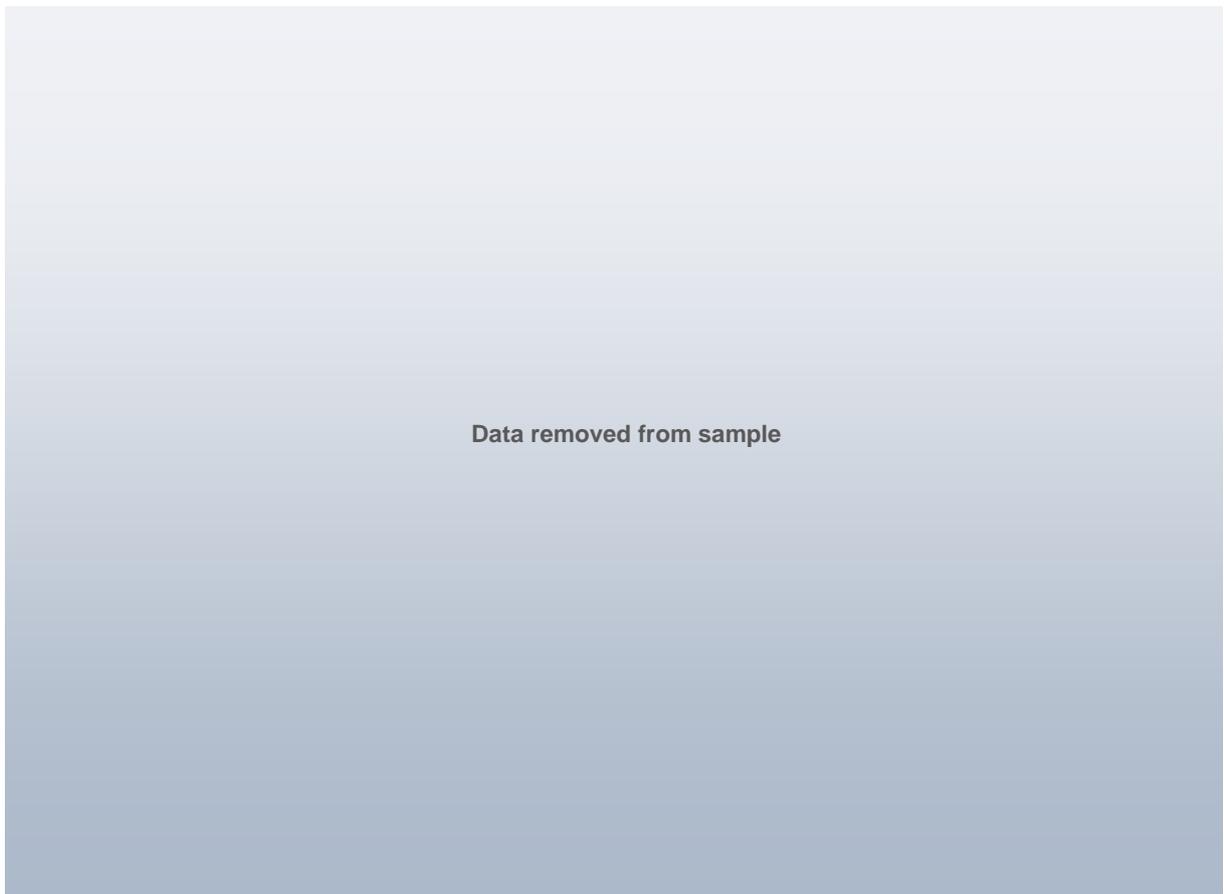




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 108 LBN Brand Shares of Premium Skin Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 109 Forecast Sales of Skin Care by Category: Value 2021-2026

USD million	2021	2022	2023	2024	2025	2026
Body Care	Data removed from sample					
- Firming/Anti-Cellulite Body Care						
-- Premium Firming/Anti-Cellulite Body Care						
-- Mass Firming/Anti-Cellulite Body Care						
- General Purpose Body Care						
-- Premium General Purpose Body Care						
-- Mass General Purpose Body Care						
Facial Care						
- Acne Treatments						
-- Premium Acne Treatments						
-- Mass Acne Treatments						
- Face Masks						
-- Premium Face Masks						
-- Mass Face Masks						
- Facial Cleansers						
-- Liquid/Cream/Gel/Bar Cleansers						
--- Premium Liquid/Cream/Gel/Bar Cleansers						
--- Mass Liquid/Cream/Gel/Bar Cleansers						
-- Facial Cleansing Wipes						
--- Premium Facial Cleansing Wipes						
--- Mass Facial Cleansing Wipes						
- Moisturisers And Treatments						
-- Basic Moisturisers						
--- Premium Basic Moisturisers						
--- Mass Basic Moisturisers						
-- Anti-Agers						
--- Premium Anti-Agers						
--- Mass Anti-Agers						
- Lip Care						

- Premium Lip Care
- Mass Lip Care
- Toners
- Premium Toners
- Mass Toners
- Hand Care
- Premium Hand Care
- Mass Hand Care
- Skin Care Sets/Kits
- Premium Skin Care Sets/Kits
- Mass Skin Care Sets/Kits
- Skin Care



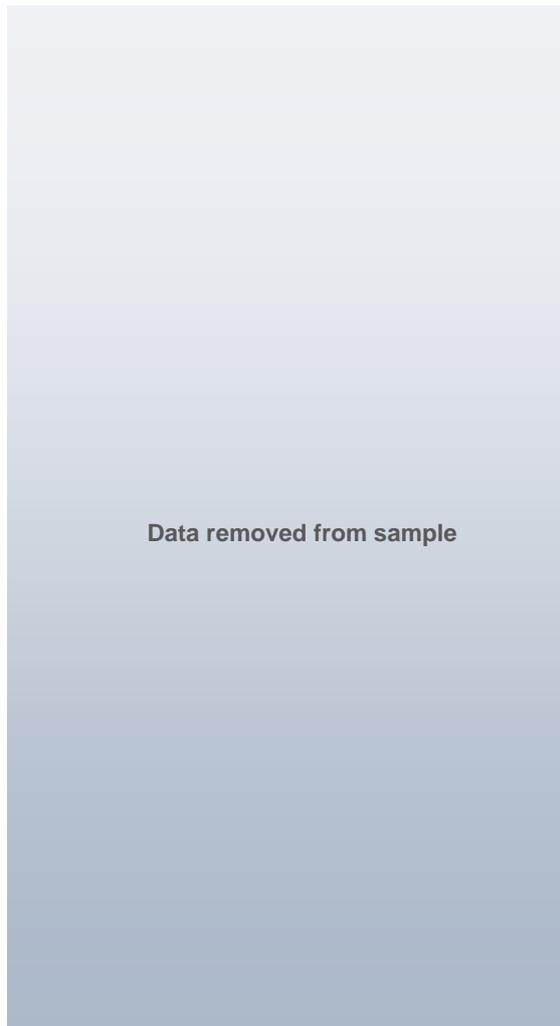
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 110 Forecast Sales of Skin Care by Category: % Value Growth 2021-2026

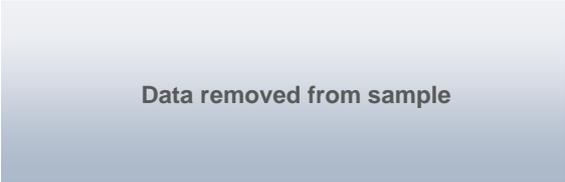
% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

- Body Care
- Firming/Anti-Cellulite Body Care
- Premium Firming/Anti-Cellulite Body Care
- Mass Firming/Anti-Cellulite Body Care
- General Purpose Body Care
- Premium General Purpose Body Care
- Mass General Purpose Body Care
- Facial Care
- Acne Treatments
- Premium Acne Treatments
- Mass Acne Treatments
- Face Masks
- Premium Face Masks
- Mass Face Masks
- Facial Cleansers
- Liquid/Cream/Gel/Bar Cleansers
- Premium Liquid/Cream/Gel/Bar Cleansers
- Mass Liquid/Cream/Gel/Bar Cleansers
- Facial Cleansing Wipes
- Premium Facial Cleansing Wipes
- Mass Facial Cleansing Wipes
- Moisturisers And Treatments
- Basic Moisturisers
- Premium Basic Moisturisers
- Mass Basic Moisturisers
- Anti-Agers
- Premium Anti-Agers
- Mass Anti-Agers
- Lip Care
- Premium Lip Care
- Mass Lip Care
- Toners
- Premium Toners
- Mass Toners
- Hand Care



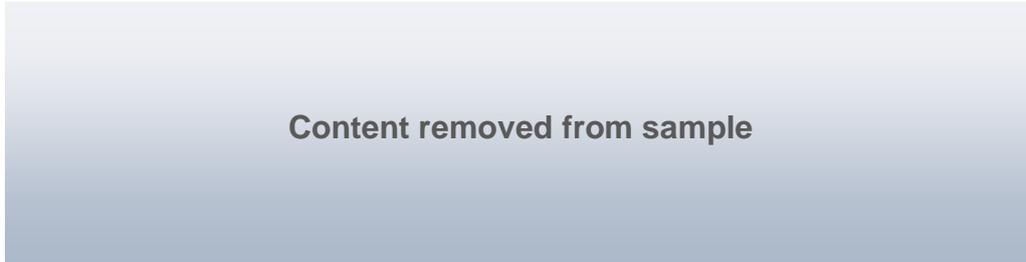
- Premium Hand Care
- Mass Hand Care
- Skin Care Sets/Kits
- Premium Skin Care Sets/Kits
- Mass Skin Care Sets/Kits
- Skin Care



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

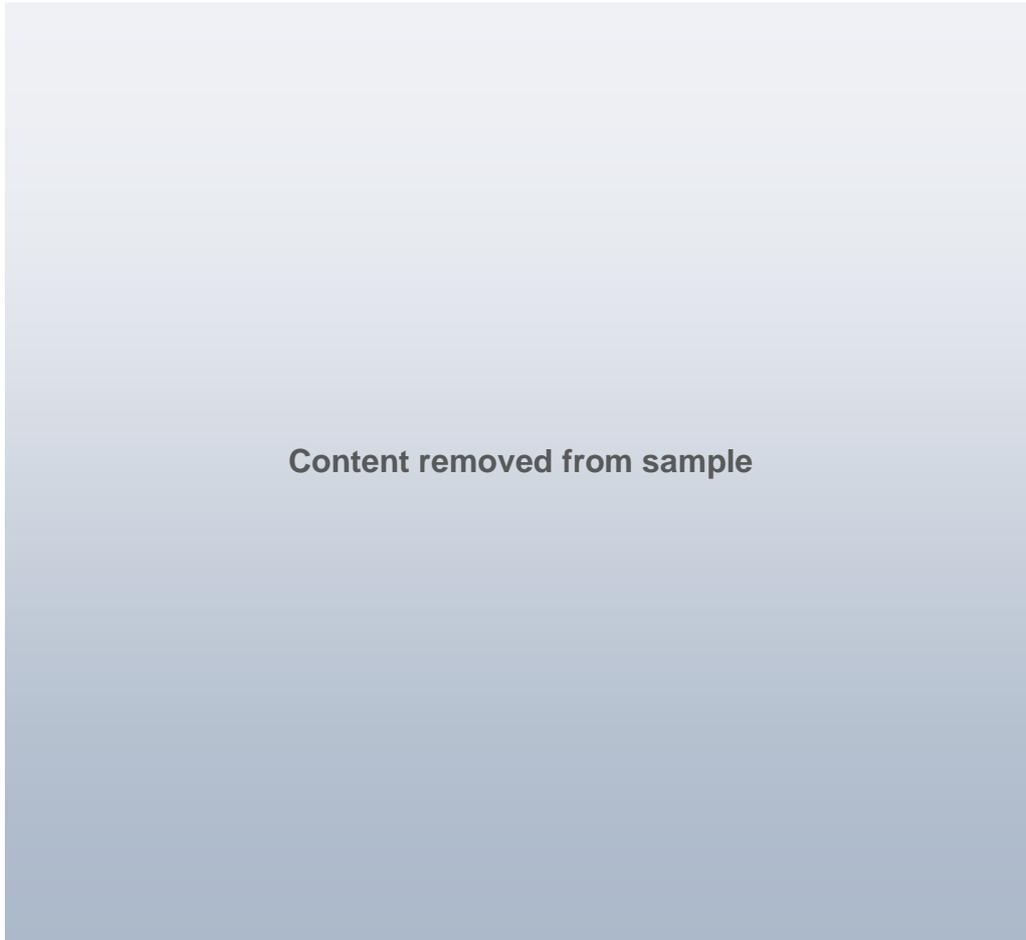
SUN CARE IN THE US - CATEGORY ANALYSIS

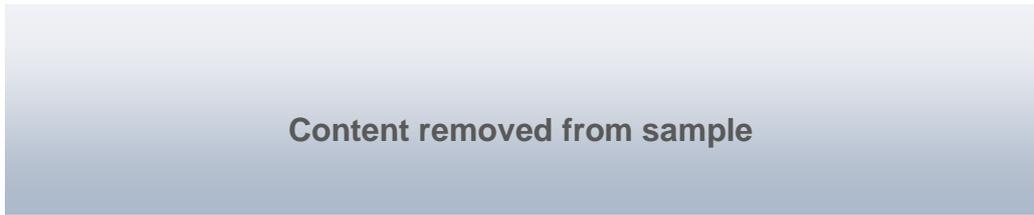
KEY DATA FINDINGS



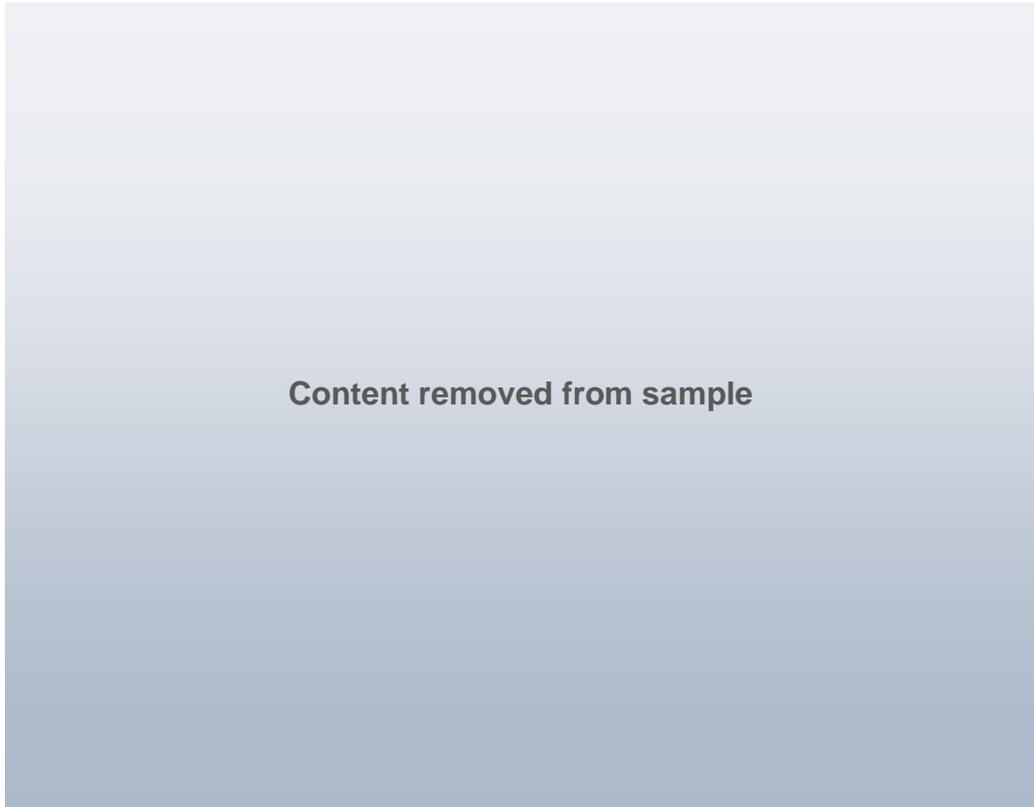
2021 DEVELOPMENTS

Strong domestic travel contributes to recovery of sun protection, but daily use remains the key driving force

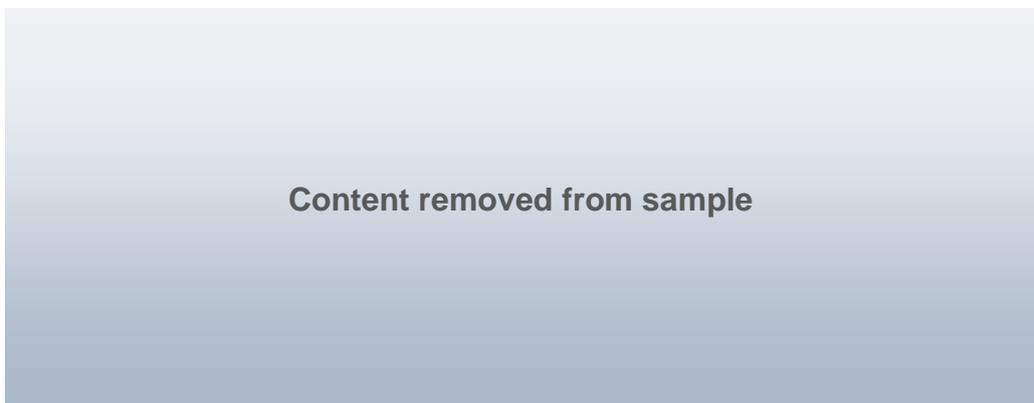




Momentum for self-tanning continues as players improve formulations and distribution



Expanding competitive pressures force players to expedite new product development and focus on digital channels for educational efforts



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PROSPECTS AND OPPORTUNITIES

Self-care and preventative health trends provide A strong outlook

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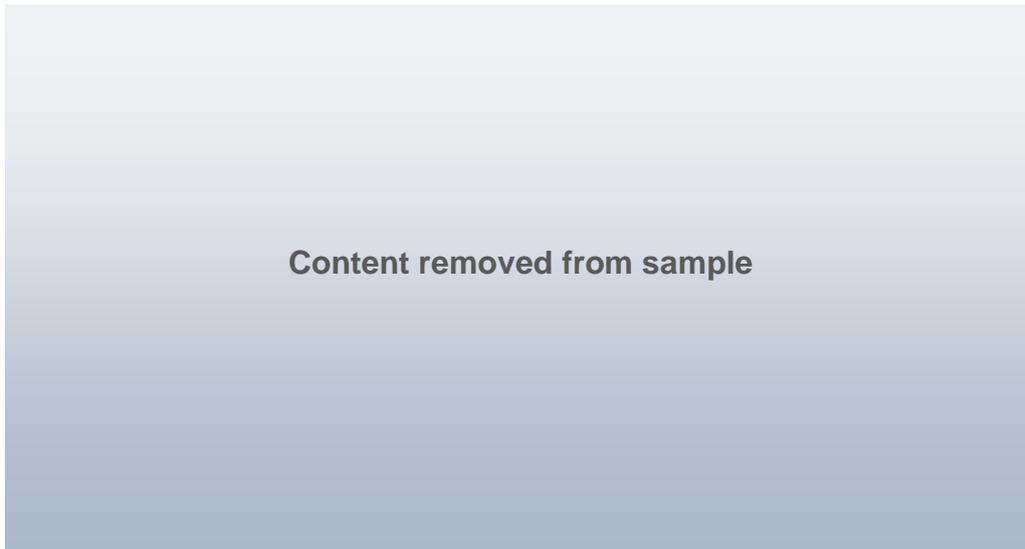
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The appetite for multifunctional products will encourage competitive pressure from other beauty categories

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Safety concerns will remain top-of-mind, which may open up further opportunities for dermocosmetics players

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CATEGORY DATA

Table 111 Sales of Sun Care by Category: Value 2016-2021

USD million	2016	2017	2018	2019	2020	2021
Adult Sun Care	Data removed from sample					
- Aftersun						
-- Premium Aftersun						
-- Mass Aftersun						
- Self-Tanning						
-- Premium Self-Tanning						
-- Mass Self-Tanning						
- Sun Protection						
-- Premium Sun Protection						
-- Mass Sun Protection						
Baby and Child-specific Sun Care						
Sun Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 112 Sales of Sun Care by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Adult Sun Care	Data removed from sample		
- Aftersun			
-- Premium Aftersun			
-- Mass Aftersun			
- Self-Tanning			
-- Premium Self-Tanning			
-- Mass Self-Tanning			
- Sun Protection			

-- Premium Sun Protection
 -- Mass Sun Protection
 Baby and Child-specific Sun Care
 Sun Care

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 113 NBO Company Shares of Sun Care: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 114 LBN Brand Shares of Sun Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 115 LBN Brand Shares of Premium Adult Sun Care: % Value 2018-2021

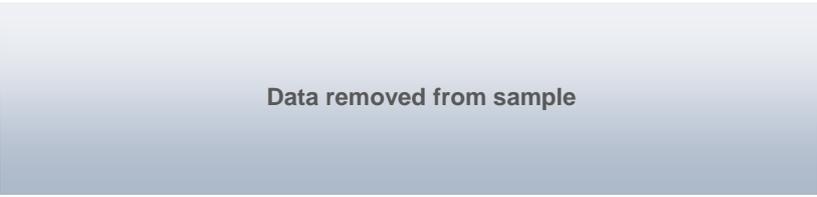
% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 116 Forecast Sales of Sun Care by Category: Value 2021-2026

USD million	2021	2022	2023	2024	2025	2026
Adult Sun Care	Data removed from sample					
- Aftersun						
-- Premium Aftersun						
-- Mass Aftersun						
- Self-Tanning						
-- Premium Self-Tanning						

- Mass Self-Tanning
- Sun Protection
- Premium Sun Protection
- Mass Sun Protection
- Baby and Child-specific Sun Care
- Sun Care



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 117 Forecast Sales of Sun Care by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

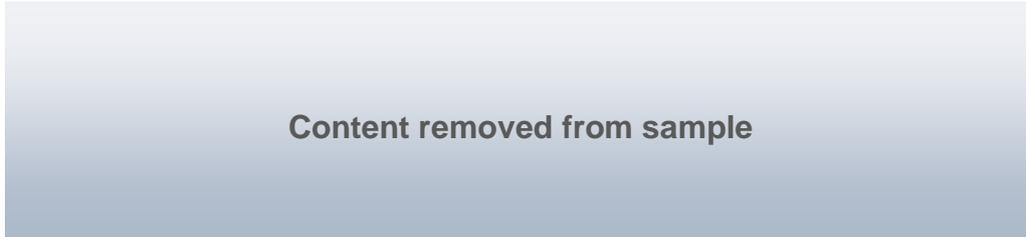
- Adult Sun Care
- Aftersun
- Premium Aftersun
- Mass Aftersun
- Self-Tanning
- Premium Self-Tanning
- Mass Self-Tanning
- Sun Protection
- Premium Sun Protection
- Mass Sun Protection
- Baby and Child-specific Sun Care
- Sun Care



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

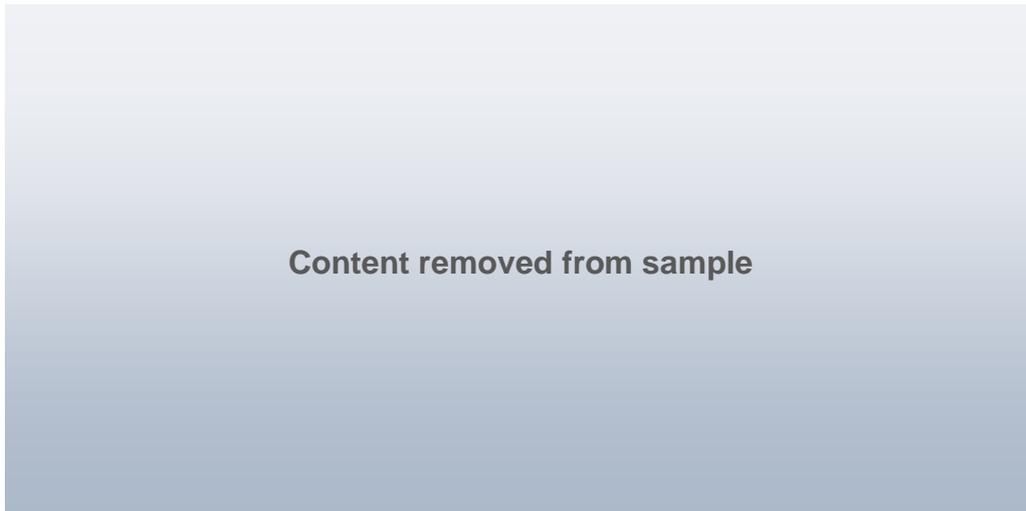
PREMIUM BEAUTY AND PERSONAL CARE IN THE US - CATEGORY ANALYSIS

KEY DATA FINDINGS

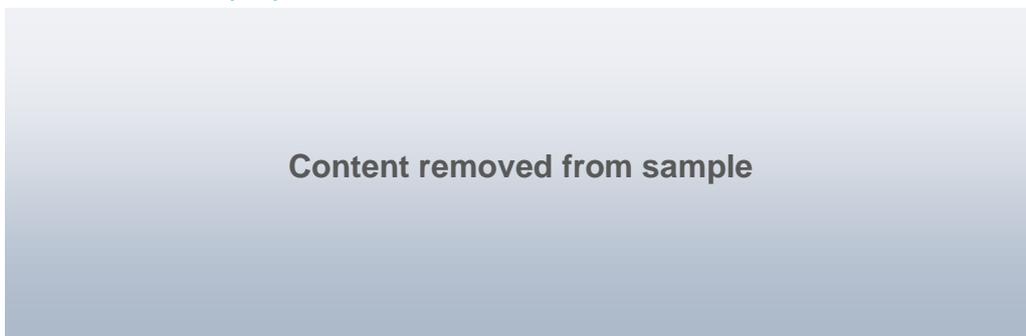


2021 DEVELOPMENTS

Premium fragrances contributes largest absolute value gains to premium beauty and personal care



Skinification helps premium colour cosmetics rebound



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Premium dermocosmetics ripe for expansion despite smaller footprint compared with mass

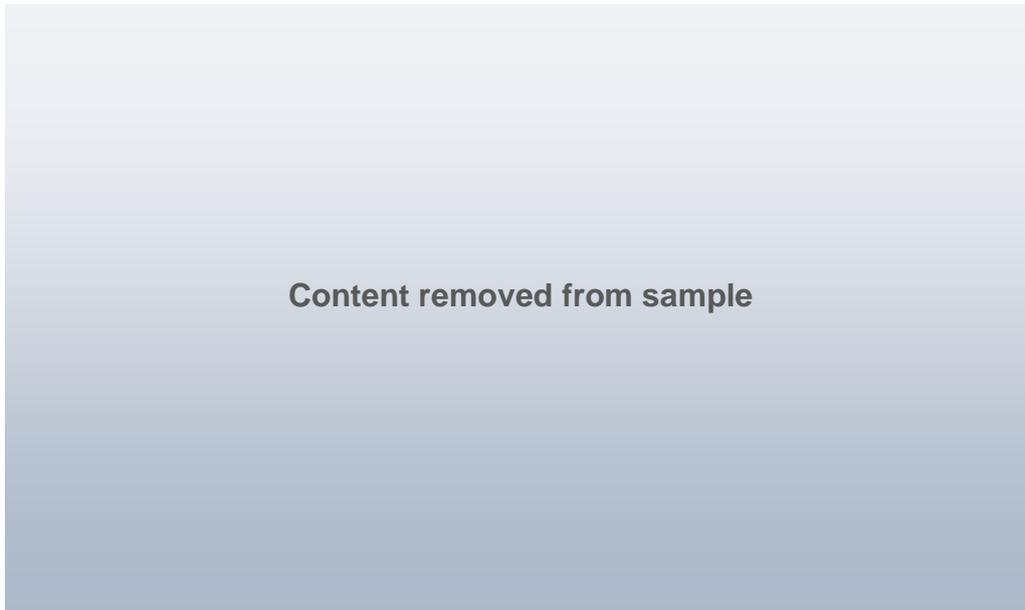
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PROSPECTS AND OPPORTUNITIES

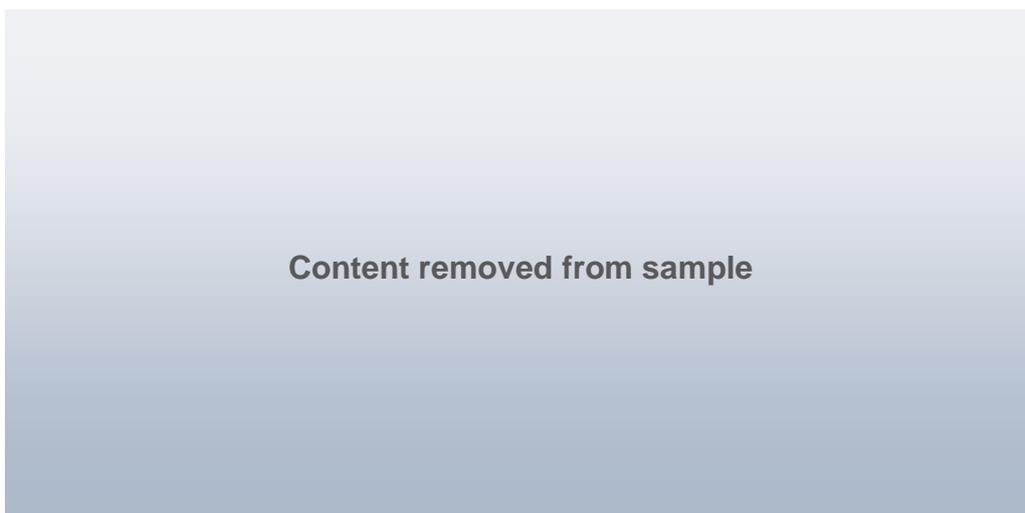
Sustainable features to ramp up in premium beauty and personal care

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Mergers and acquisitions activity to focus on premium indie brands and clean beauty



Personalisation to enhance the premium beauty consumer experience



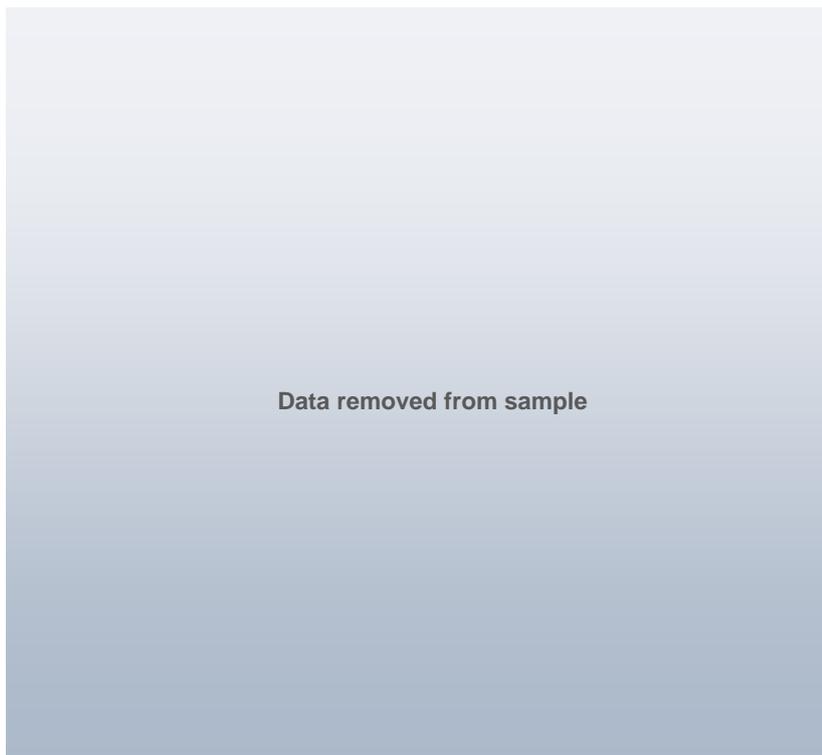
CATEGORY DATA

Table 118 Sales of Premium Beauty and Personal Care by Category: Value 2016-2021

USD million

	2016	2017	2018	2019	2020	2021
Premium Baby and Child-specific Products	Data removed from sample					
Premium Bath and Shower						
Premium Colour Cosmetics						
- Premium Eye Make-Up						

- Premium Facial Make-Up
- Premium Lip Products
- Premium Nail Products
- Premium Colour
Cosmetics Sets/Kits
- Premium Deodorants
- Premium Fragrances
- Premium Men's
Fragrances
- Premium Women's
Fragrances
- Premium Unisex
Fragrances
- Premium Fragrance
Sets/Kits
- Premium Hair Care
- Premium Skin Care
- Premium Body Care
- Premium Facial Care
- Premium Hand Care
- Premium Skin Care
Sets/Kits
- Premium Adult Sun Care
- Premium Aftersun
- Premium Self-Tanning
- Premium Sun Protection
- Premium Beauty and
Personal Care



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

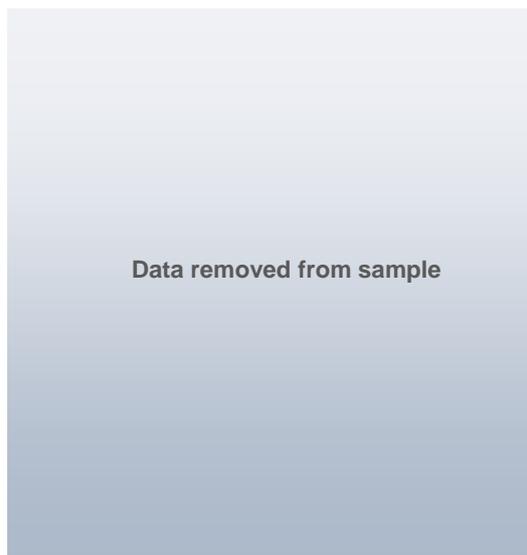
Note: Premium beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Table 119 Sales of Premium Beauty and Personal Care by Category: % Value Growth 2016-2021

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

- Premium Baby and Child-specific Products
- Premium Bath and Shower
- Premium Colour Cosmetics
- Premium Eye Make-Up
- Premium Facial Make-Up
- Premium Lip Products
- Premium Nail Products
- Premium Colour Cosmetics Sets/Kits
- Premium Deodorants
- Premium Fragrances
- Premium Men's Fragrances
- Premium Women's Fragrances
- Premium Unisex Fragrances
- Premium Fragrance Sets/Kits
- Premium Hair Care
- Premium Skin Care
- Premium Body Care
- Premium Facial Care
- Premium Hand Care
- Premium Skin Care Sets/Kits



Premium Adult Sun Care
 - Premium Aftersun
 - Premium Self-Tanning
 - Premium Sun Protection
 Premium Beauty and Personal Care

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Premium beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Table 120 NBO Company Shares of Premium Beauty and Personal Care: % Value 2017-2021

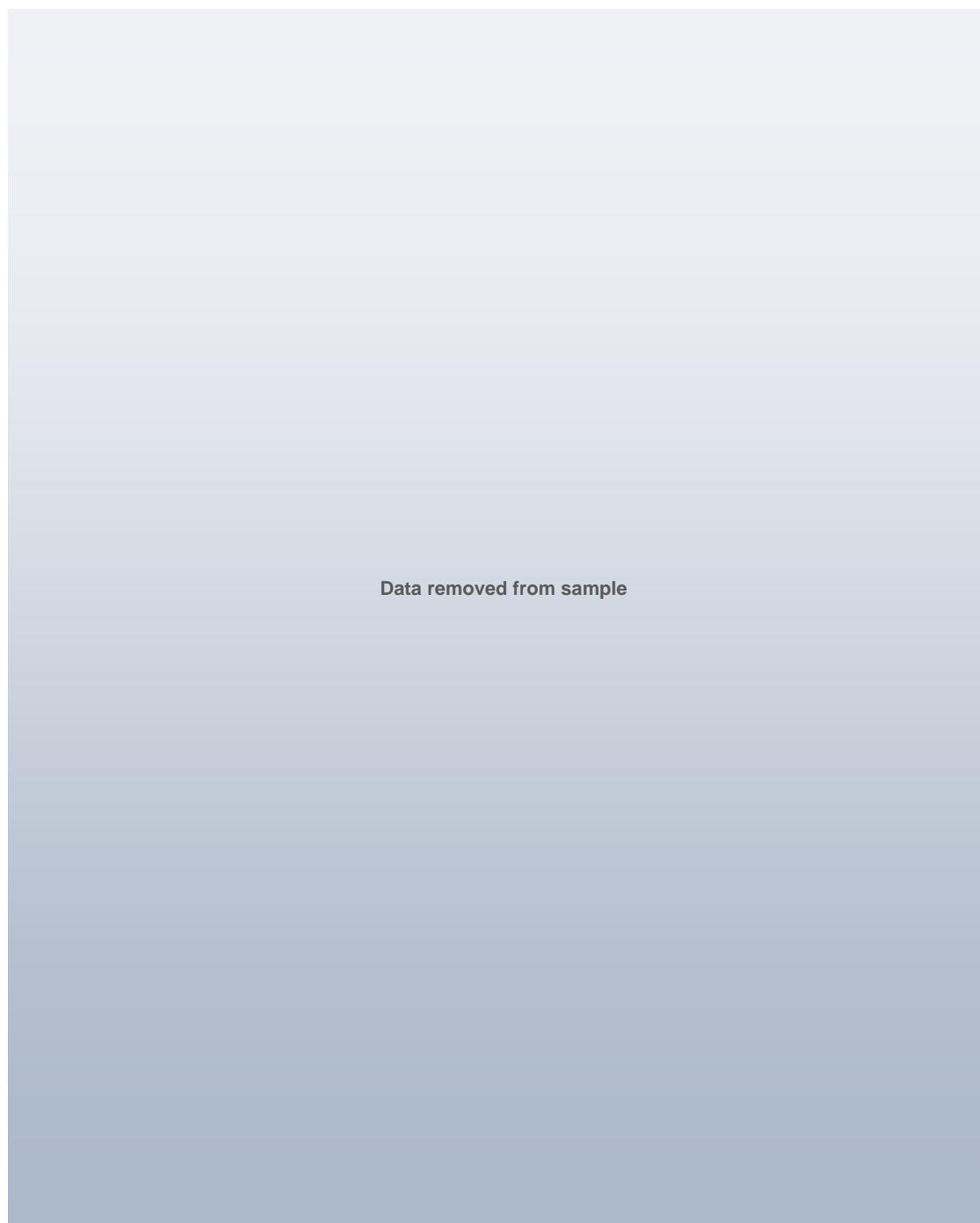
% retail value rsp Company	2017	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 121 LBN Brand Shares of Premium Beauty and Personal Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 122 Forecast Sales of Premium Beauty and Personal Care by Category: Value 2021-2026

USD million	2021	2022	2023	2024	2025	2026
Premium Baby and Child-specific Products	Data removed from sample					
Premium Bath and Shower						
Premium Colour Cosmetics						
- Premium Eye Make-Up						
- Premium Facial Make-Up						
- Premium Lip Products						
- Premium Nail Products						
- Premium Colour Cosmetics Sets/Kits						
Premium Deodorants						
Premium Fragrances						
- Premium Men's Fragrances						
- Premium Women's Fragrances						
- Premium Unisex Fragrances						
- Premium Fragrance Sets/Kits						
Premium Hair Care						
Premium Skin Care						
- Premium Body Care						
- Premium Facial Care						
- Premium Hand Care						
- Premium Skin Care Sets/Kits						
Premium Adult Sun Care						
- Premium Aftersun						
- Premium Self-Tanning						
- Premium Sun Protection						
Premium Beauty and Personal Care						

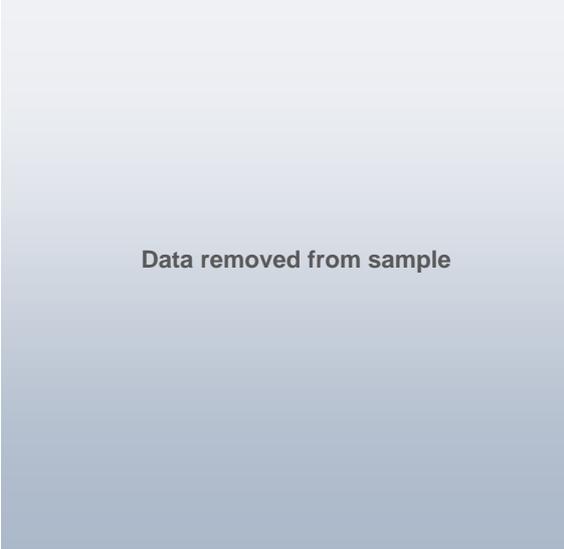
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Premium beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Table 123 Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Premium Baby and Child-specific Products	Data removed from sample		
Premium Bath and Shower			
Premium Colour Cosmetics			
- Premium Eye Make-Up			
- Premium Facial Make-Up			

- Premium Lip Products
- Premium Nail Products
- Premium Colour Cosmetics Sets/Kits
- Premium Deodorants
- Premium Fragrances
- Premium Men's Fragrances
- Premium Women's Fragrances
- Premium Unisex Fragrances
- Premium Fragrance Sets/Kits
- Premium Hair Care
- Premium Skin Care
- Premium Body Care
- Premium Facial Care
- Premium Hand Care
- Premium Skin Care Sets/Kits
- Premium Adult Sun Care
- Premium Aftersun
- Premium Self-Tanning
- Premium Sun Protection
- Premium Beauty and Personal Care



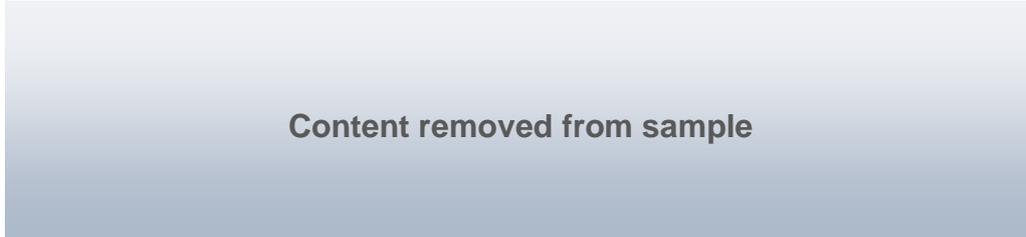
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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Premium beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

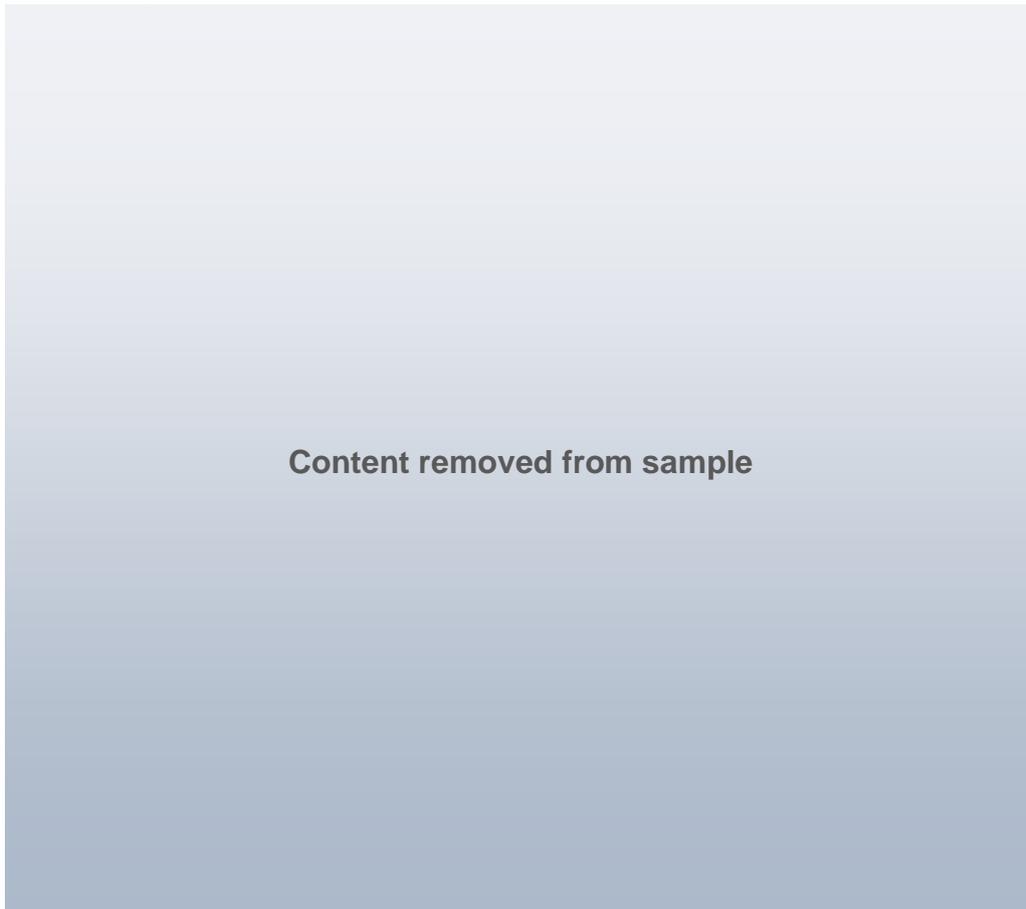
MASS BEAUTY AND PERSONAL CARE IN THE US - CATEGORY ANALYSIS

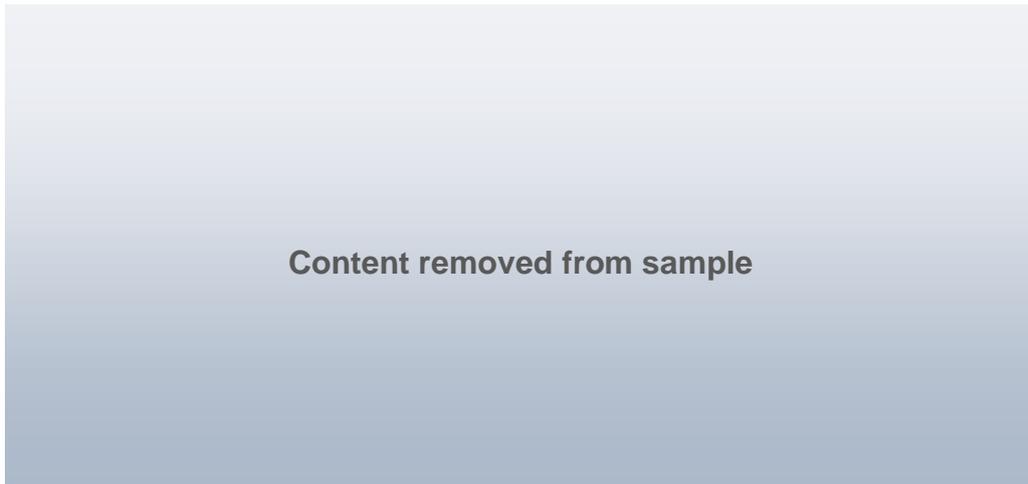
KEY DATA FINDINGS



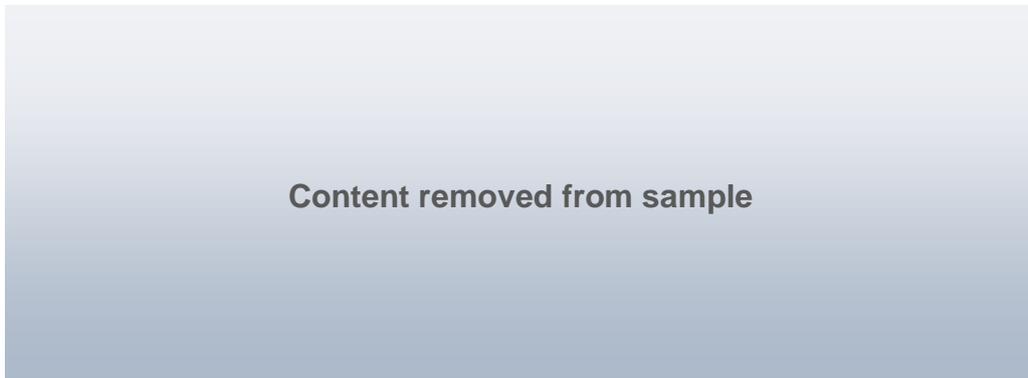
2021 DEVELOPMENTS

Wellness drives up skinification, dermocosmetics and self-care positioning

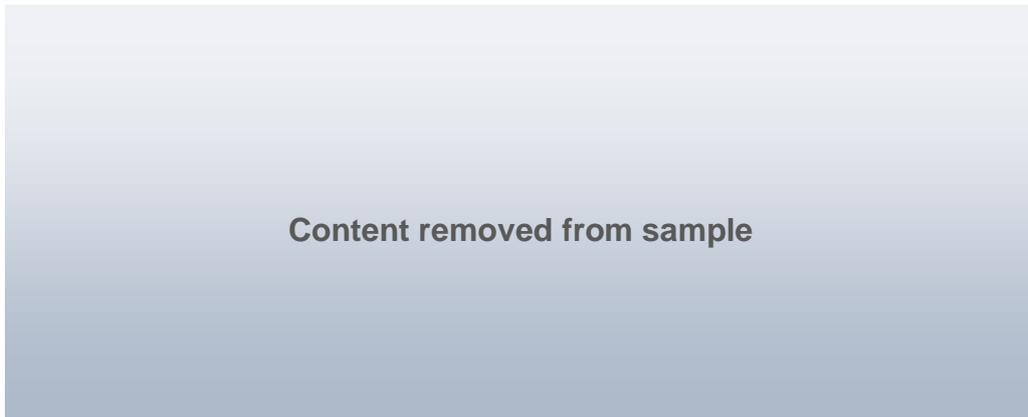




Demand for mass hygiene products slows, but remains above pre-COVID-19 levels



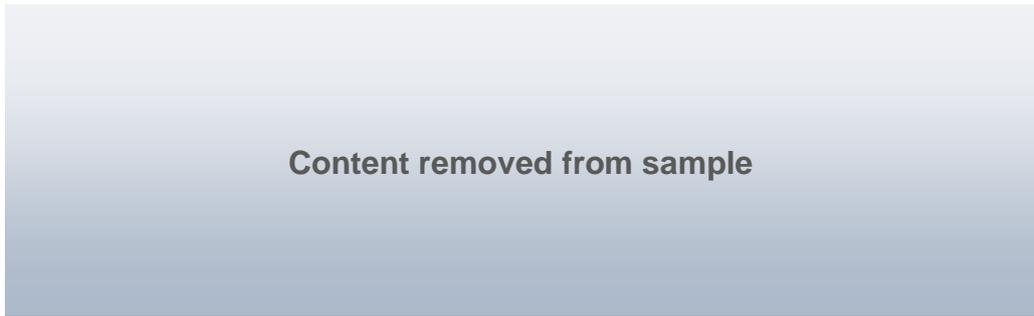
Mass brands expand "clean" offerings with refillable packaging



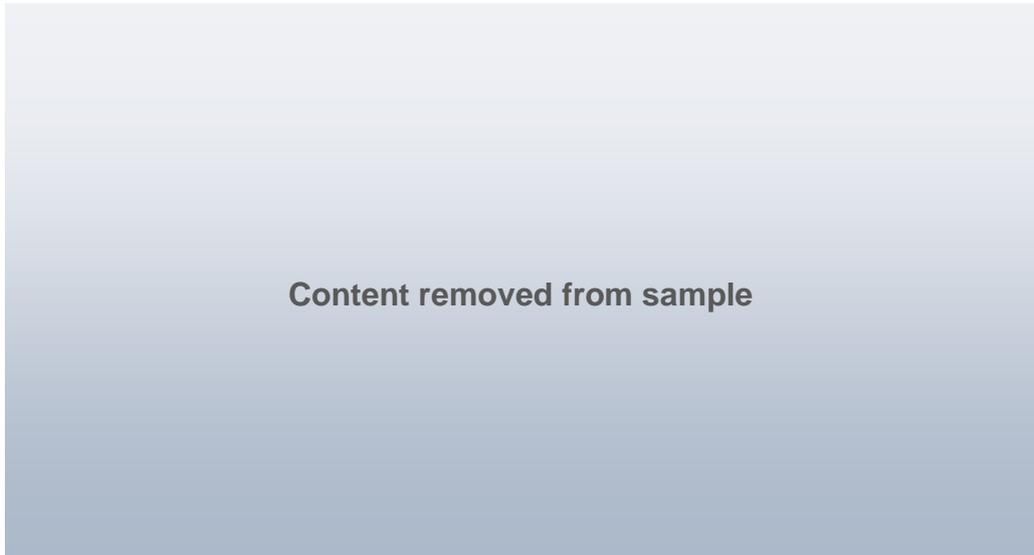
PROSPECTS AND OPPORTUNITIES

Increasing hybridity between beauty and personal care products

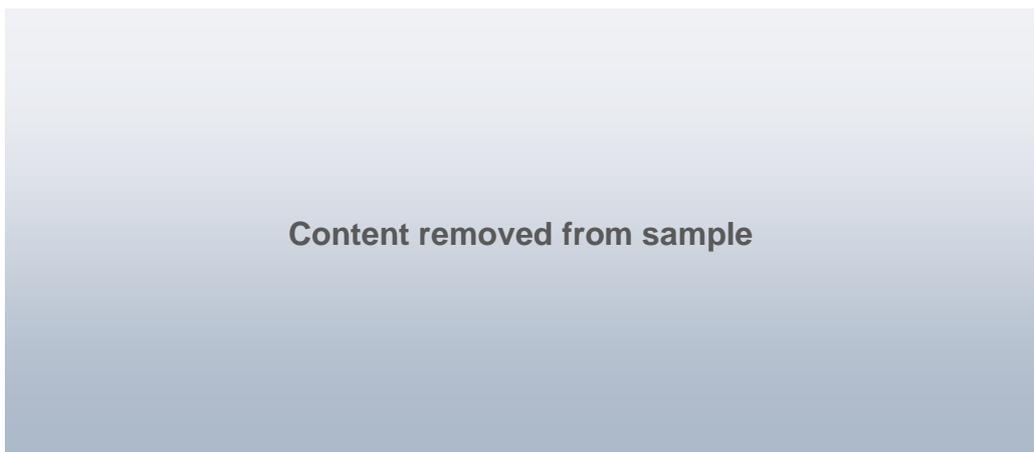




Mass brands adopt innovative solutions to make sustainability achievable and affordable



Social media key to renewing interest in beauty discovery amongst mass brands



CATEGORY DATA

Table 124 Sales of Mass Beauty and Personal Care by Category: Value 2016-2021

USD million

	2016	2017	2018	2019	2020	2021
Mass Baby and Child-specific Products	Data removed from sample					
Mass Bath and Shower						
Mass Colour Cosmetics						
- Mass Eye Make-Up						
- Mass Facial Make-Up						
- Mass Lip Products						
- Mass Nail Products						
- Mass Colour Cosmetics Sets/Kits						
Mass Deodorants						
Mass Fragrances						
- Mass Men's Fragrances						
- Mass Women's Fragrances						
- Mass Unisex Fragrances						
- Mass Fragrance Sets/Kits						
Mass Hair Care						
Mass Skin Care						
- Mass Body Care						
- Mass Facial Care						
- Mass Hand Care						
- Mass Skin Care Sets/Kits						
Mass Adult Sun Care						
- Mass Aftersun						
- Mass Self-Tanning						
- Mass Sun Protection						
Mass Beauty and Personal Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Table 125 Sales of Mass Beauty and Personal Care by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Mass Baby and Child-specific Products	Data removed from sample		
Mass Bath and Shower			
Mass Colour Cosmetics			
- Mass Eye Make-Up			
- Mass Facial Make-Up			
- Mass Lip Products			
- Mass Nail Products			
- Mass Colour Cosmetics Sets/Kits			
Mass Deodorants			
Mass Fragrances			
- Mass Men's Fragrances			
- Mass Women's Fragrances			
- Mass Unisex Fragrances			
- Mass Fragrance Sets/Kits			

- Mass Hair Care
- Mass Skin Care
- Mass Body Care
- Mass Facial Care
- Mass Hand Care
- Mass Skin Care Sets/Kits
- Mass Adult Sun Care
- Mass Aftersun
- Mass Self-Tanning
- Mass Sun Protection
- Mass Beauty and Personal Care

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: Mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Table 126 NBO Company Shares of Mass Beauty and Personal Care: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 127 LBN Brand Shares of Mass Beauty and Personal Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 128 Forecast Sales of Mass Beauty and Personal Care by Category: Value 2021-2026

USD million	2021	2022	2023	2024	2025	2026
Mass Baby and Child-specific Products	Data removed from sample					
Mass Bath and Shower						
Mass Colour Cosmetics						
- Mass Eye Make-Up						
- Mass Facial Make-Up						
- Mass Lip Products						
- Mass Nail Products						
- Mass Colour Cosmetics Sets/Kits						
Mass Deodorants						
Mass Fragrances						
- Mass Men's Fragrances						
- Mass Women's Fragrances						
- Mass Unisex Fragrances						
- Mass Fragrance Sets/Kits						
Mass Hair Care						
Mass Skin Care						
- Mass Body Care						
- Mass Facial Care						
- Mass Hand Care						
- Mass Skin Care Sets/Kits						
Mass Adult Sun Care						
- Mass Aftersun						
- Mass Self-Tanning						
- Mass Sun Protection						
Mass Beauty and Personal Care						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care.

Table 129 Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
	Data removed from sample		

Mass Baby and Child-specific Products

Mass Bath and Shower

Mass Colour Cosmetics

- Mass Eye Make-Up

- Mass Facial Make-Up

- Mass Lip Products

- Mass Nail Products

- Mass Colour Cosmetics Sets/Kits

Mass Deodorants

Mass Fragrances

- Mass Men's Fragrances

- Mass Women's Fragrances

- Mass Unisex Fragrances

- Mass Fragrance Sets/Kits

Mass Hair Care

Mass Skin Care

- Mass Body Care

- Mass Facial Care

- Mass Hand Care

- Mass Skin Care Sets/Kits

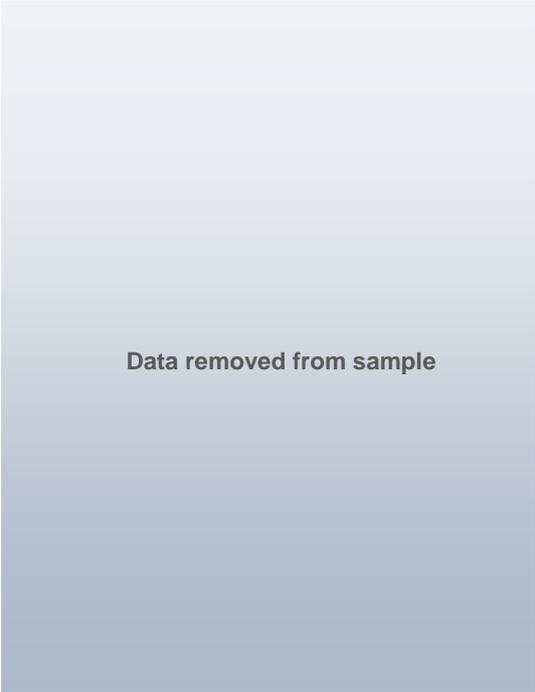
Mass Adult Sun Care

- Mass Aftersun

- Mass Self-Tanning

- Mass Sun Protection

Mass Beauty and Personal Care



Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care.