Global Consumer Trends in Beauty and Home Care

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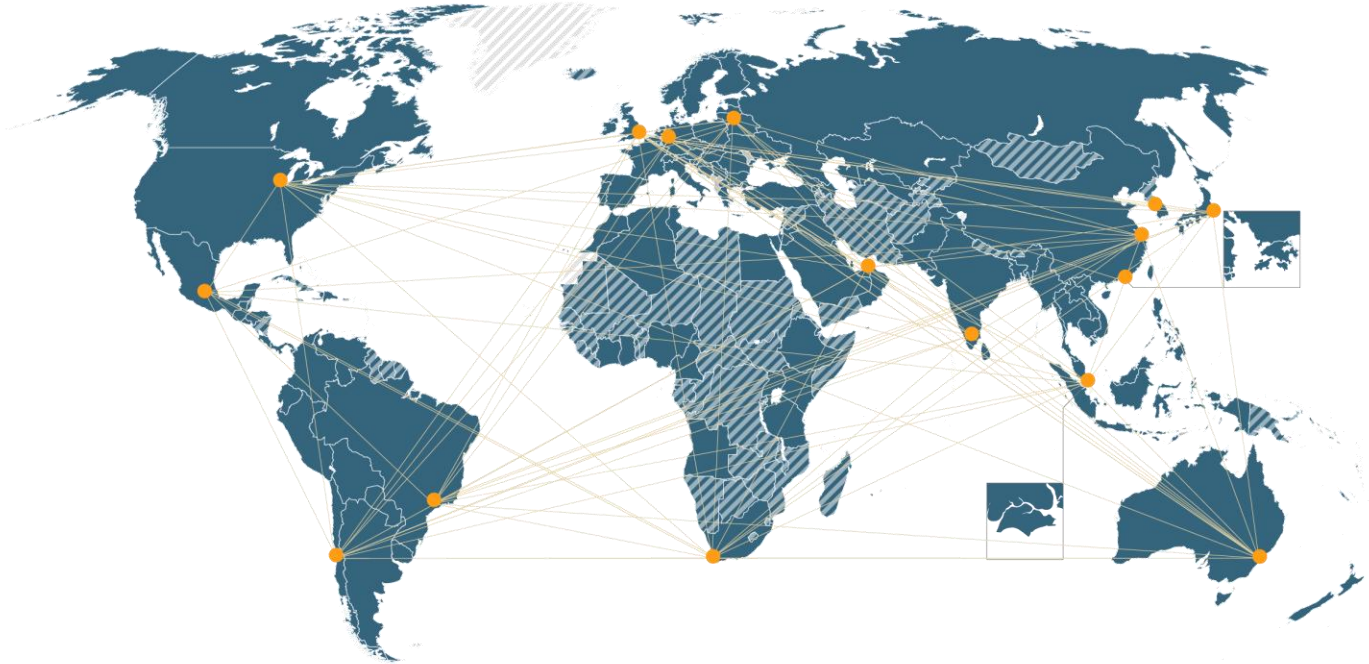
Euromonitor International network and coverage



16 OFFICES

London	Tokyo
Chicago	Sydney
Singapore	Bangalore
Shanghai	São Paulo
Vilnius	Hong Kong
Santiago	Seoul
Dubai	Düsseldorf
Cape Town	Mexico City

100 COUNTRIES
in-depth analysis on consumer goods and service industries

210 COUNTRIES AND TERRITORIES
\+
demographic, macro- and socio-economic data on consumers and economies

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Research expertise

Consumer Products

- Alcoholic Drinks
- Apparel
- Automotive
- Beauty and Personal Care
- Cannabis
- Consumer Appliances
- Consumer Electronics
- Consumer Health
- Eyewear
- Fresh Food
- Health and Wellness
- Home and Garden
- Home Care
- Hot Drinks
- Luxury Goods
- Nutrition
- Packaged Food
- Personal Accessories
- Pet Care
- Product Claims and Positioning
- Soft Drinks
- Tissue and Hygiene
- Tobacco
- Toys and Games

Services

- Consumer Finance
- Consumer Foodservice
- Retailing
- Sports
- Travel

Supply

- Ingredients
- Packaging

Analytics

- Competitor Analytics
- Industry Forecast Models

Economies

- Business Dynamics
- Cities
- Economy, Finance and Trade
- Industrial
- Natural Resources

Consumers

- Digital Consumer
- Households
- Income and Expenditure
- Lifestyles
- Population

Overview

Global Overview – Key Takeaways

- Beauty and Personal Care
- Home Care

Top Trends Shaping the Industry

Future Developments

USD 593 bn

Global Beauty & Personal Care Industry **2024**

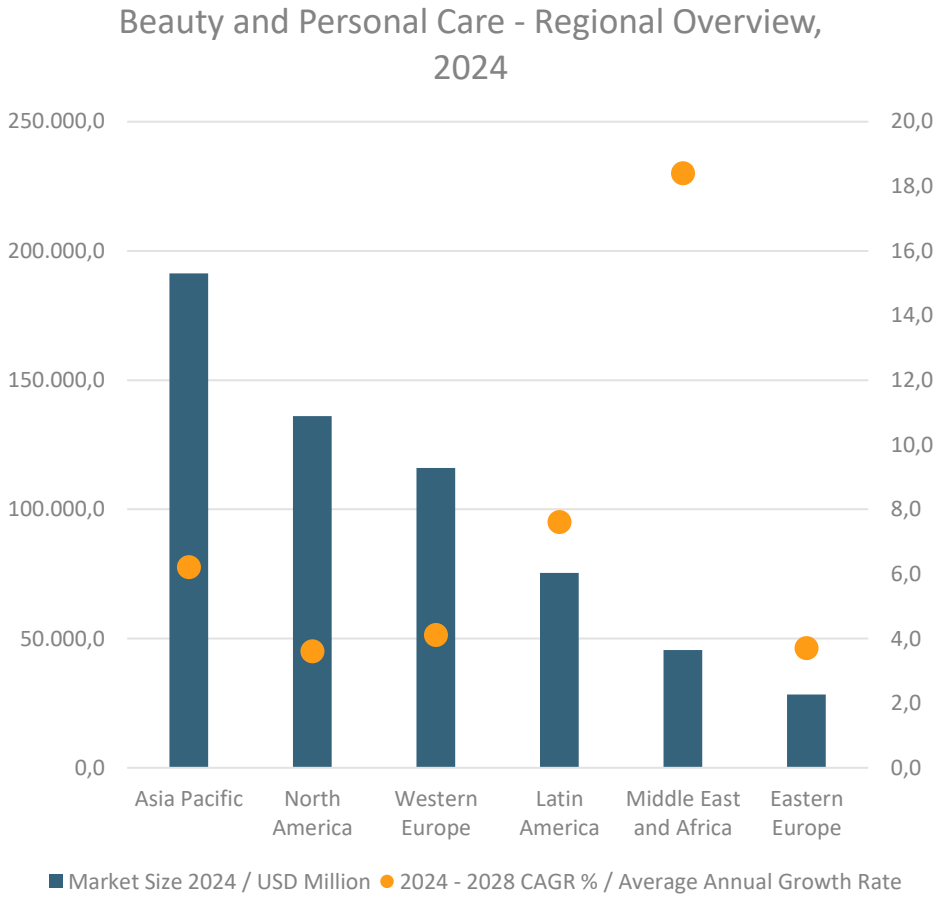
7%

Global Beauty and Personal Care Growth in **2024** (current value, fixed ex rate)

USD 688 bn

Global Estimated Beauty & Personal Care Industry by **2029**

Image source: vecteezy.com



Source: Euromonitor International Beauty and Personal Care 2024ed

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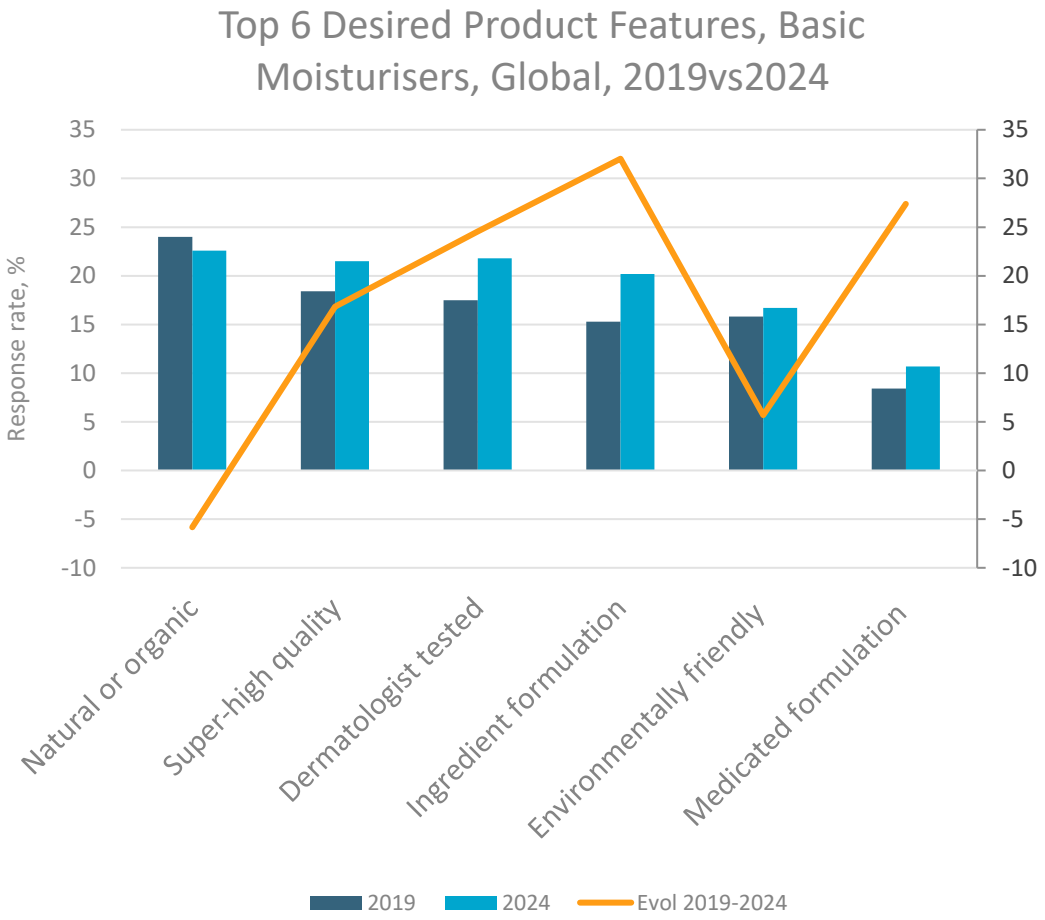
Key Drivers of the BPC Industry

Growing convergence of health and beauty

Science-backed beauty

Ingredients and high concentration products

Innovation and hybrid approach

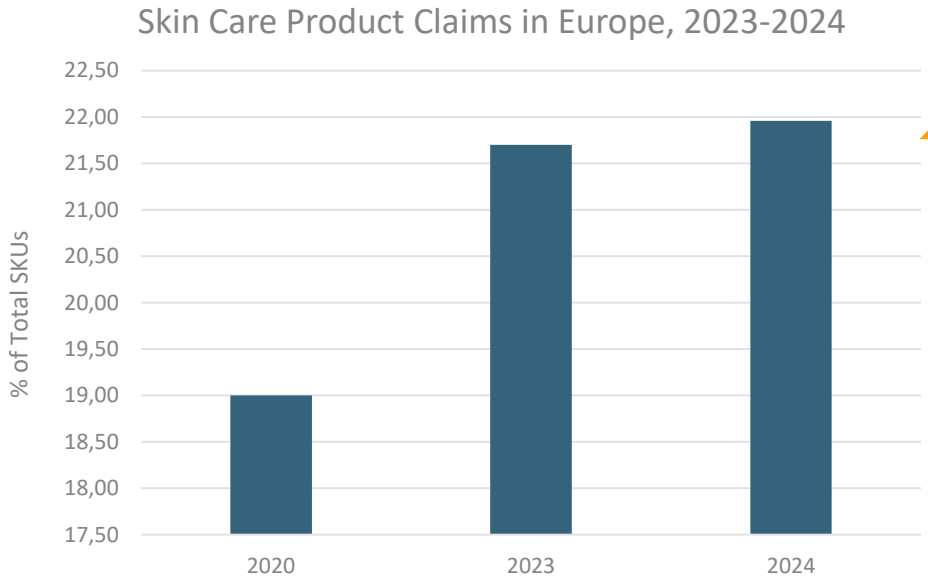


Natural or eco-friendly beauty lose importance, whilst *dermocosmetics and therapeutic ingredients gain popularity.*

Source: Euromonitor International Voice of the Consumer: Beauty Survey, ed2024, n=1468

Image source: specialprojects.news24.com

Ingredient spotlight on winners



Product Claim “Vegan” in Skin Care, Europe, 2023-2024

WINNERS

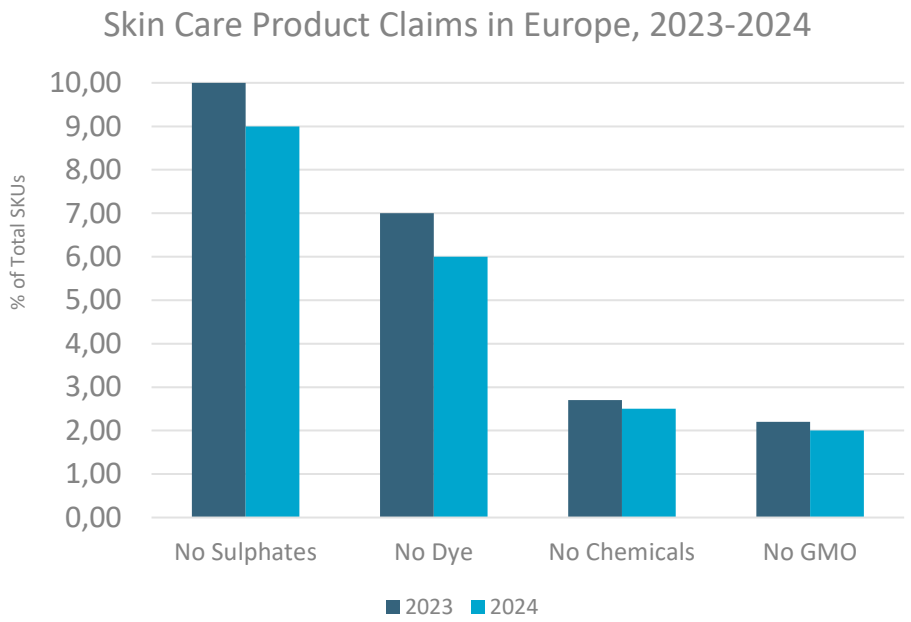
Winners:

- Hyaluronic Acid
- Niacinamide
- Retinol
- Vitamin C

Source: Euromonitor International VIA Product Claims

Image source: specialprojects.news24.com

Ingredient spotlight on losers



Source: Euromonitor International VIA Product Claims

LOSERS

Losers:

- Sulphates
- Synthetic dyes
- Parabens

Image source: specialprojects.news24.com

$191 bn

GLOBAL SALES OF HOME CARE IN 2024

$28.3 bn

GLOBAL SALES OF SURFACE CARE IN 2024

$52.9 bn

APAC – THE WORLD'S LARGEST MARKET

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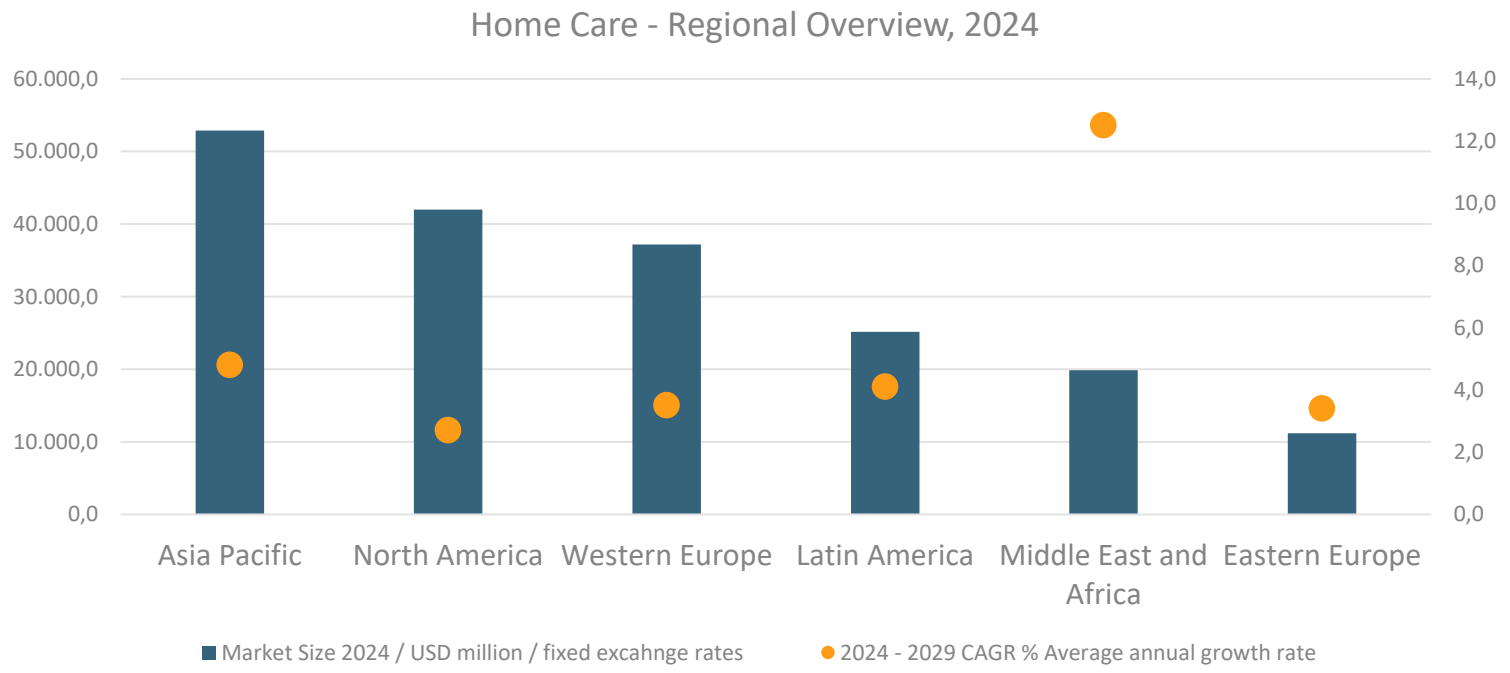
Emerging and Developing Countries with Most Dynamic Growth

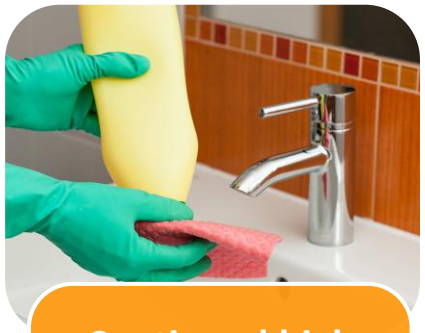


Source: Euromonitor, Passport Home Care

Home Care – Growth Drivers

Private Label benefits from inflation

Self-care products are growing faster over time



Continued high consumer demand for hygiene in emerging markets

Brands respond through innovation

Mood enhancing emerges as a consistent self-care experiential claim in premium positioning at the top of the step-up structure

Image source: Therapyclean.com
Source: Euromonitor Voice of the Consumer: Health and Nutrition Survey, fielded January to February 2024 (n=21,221)

Procter & Gamble introduces mood boosting claims to its leading air freshening brand

Image source: Procter & Gamble US

Beauty Care Brand Diptyque Expands into Home Care with Line of Cleaning Products

7.5% of those taking supplements do it for mood or relaxation effects

50% of home care companies think emotive scents will strongly impact results

4th after quality, price and performance, next comes appealing scent in the key buying factors

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Key Consumer Trends Impacting the Global Home Care Industry

Premium vs Value

Channels

Sustainability

Wellness

Sources: Euromonitor Voice of the Consumer: Lifestyles, Sustainability, Digital Consumer, and Health and Nutrition Surveys

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BPC and HC Markets – Longer-term Shifts

1 Formulation & sourcing

2 Reinforced blurring

3 Self-care

4 Future consumer

Legacy of inflation will continue into the forecast period

Though inflation has tapered considerably, consumers have reoriented purchasing behaviour and will need affirmative reasons to restart prior rates of engagement.

Consumer incentives point to demands for multifunctionality

Consumer interest in toward holistic solutions will continue unabated going into the forecast period. Offering options that meet consumers' broad lifestyle considerations is critical to build and sustain loyalty.

E-commerce innovations sustain interest in key markets

The rise of DTC selling, livestreaming, and social commerce will continue to drive growth f home care products.

Thank You

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