

### December 2018

#### The Amazon Effect - US

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

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

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

### October 2018

#### Ingredient Trends in Beauty - US

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

#### Skin Protection - US

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

#### Consumers and the Economic Outlook - US

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

### September 2018

#### Beauty Retailing - US

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

#### Shaving and Hair Removal Products - US

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

#### Black Haircare - US

#### Fragrances - US

## Beauty and Personal Care - USA

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

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

### Salon Services - US

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

## August 2018

### Bodycare and Deodorant - US

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

## July 2018

### Medicated Skincare - US

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

### Consumers and the Economic Outlook - US

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

### Color Cosmetics - US

"Despite a slowdown, color cosmetics continues to post growth, with facial cosmetics still commanding the highest consumer spend. The popularity of the no-makeup look continues to be on-trend, with consumers seeking skincare-based formulas to boost radiance.

Lastly, Black women are a key market, as the inclusivity movement encourages product trial ...

## June 2018

### Oral Health - US

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

## May 2018

### Facial Skincare and Anti-aging - US

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

### Footcare - US

"Footcare industry sales are projected to dip. The industry is slowly stabilizing after a sharp sales increase in 2015 was followed immediately by steep declines, a result of a foot smoothing device fad. Foot pain and aesthetic issues are fairly common, driving footcare product usage. Consumers prioritize functionality over brand ...

## April 2018

### Shampoo, Conditioner and Hairstyling Products - US

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

### Feminine Hygiene and Sanitary Protection Products - US

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

### Consumers and the Economic Outlook - US

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

confidence has been marching forward at record levels, while unemployment ...

## March 2018

### The iGen Beauty Consumer - US

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

### Disposable Baby Products - US

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

## February 2018

### Drug Store Retailing - US

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

### Soap, Bath and Shower Products - US

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

### The Beauty Consumer - US

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

## January 2018

### Consumers and the Economic Outlook - US

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

### Nail Color and Care - US

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



## Beauty and Personal Care - USA

- Jennifer White Boehm, Associate ...