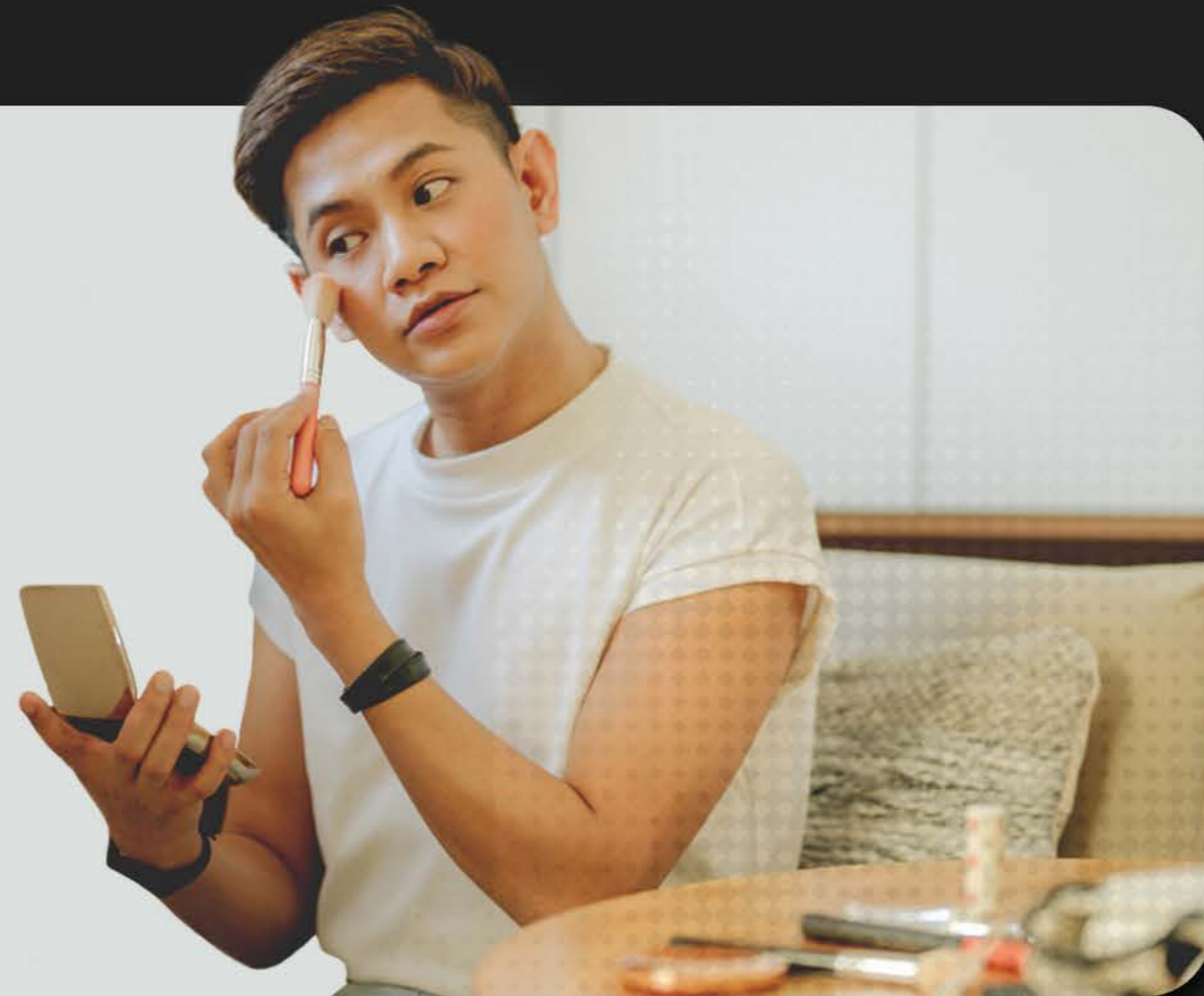


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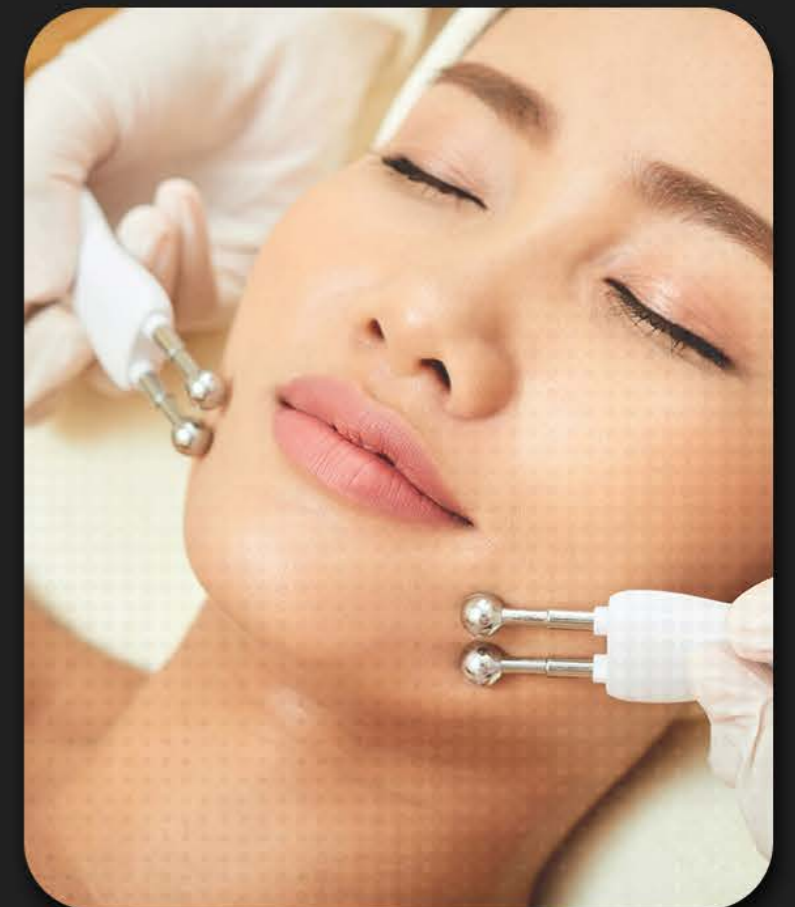
BEAUTY AND PERSONAL CARE TRENDS



2023



What beauty and personal care consumers want and why —now, next and in the future

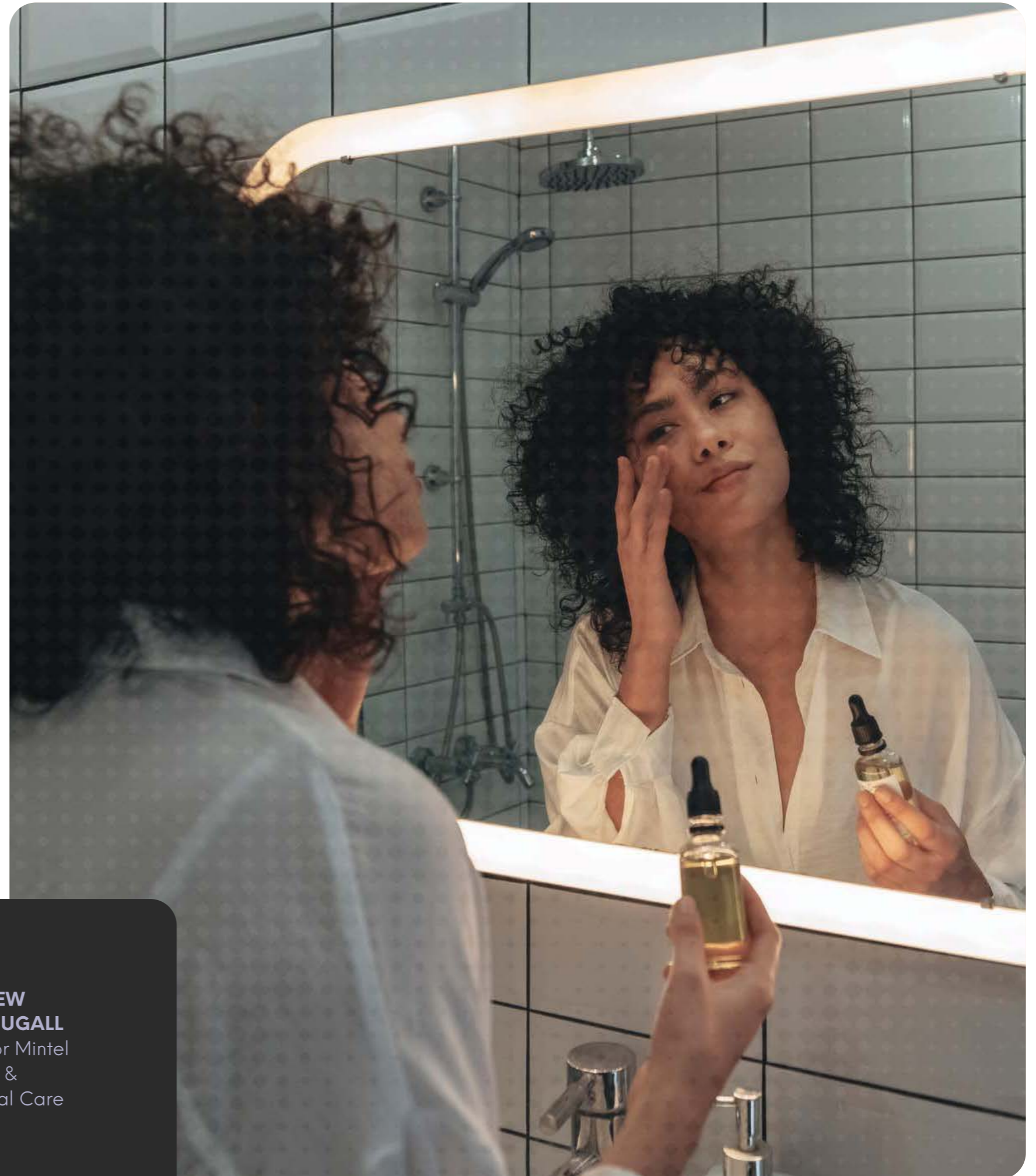


Editors' Note

As the experts in what consumers want and why, Mintel is the trusted market intelligence partner to identify the upcoming trends in consumer behaviour, product innovation and marketing tactics that will impact the future of your business. Mintel was founded by entrepreneurs with a passion for data, and we've been getting it right for over half a century—from consumer research and market analysis to machine learning, artificial intelligence and advanced analytics.

The 2023 Global Beauty and Personal Care Trends are the result of workshops comprised of Mintel's team of beauty and personal care analysts around the world. Our analysts' predictions are supported by consumer data from 36 global markets, product launches from Mintel Global New Products Database (GNPD) and evidence from Mintel's suite of data science and analytics tools.

The following is a preview of three trends that Mintel analysts believe will impact consumer demands for beauty and personal care in 2023, over the next few years, as well as 5+ years into the future. The full and in-depth insight and analysis of the trends are available exclusively to those who subscribe to Mintel's premium insights—who should speak with their Account Manager about setting up a meeting to discuss the implications of these trends for their business. All other Mintel clients should speak to their Account Managers about upgrading their subscription to view the full research and recommendations. If you're not a Mintel client, **visit [mintel.com](https://www.mintel.com) to get in touch.** We look forward to hearing from you.



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MCDUGALL**
Director Mintel
Beauty &
Personal Care

Table of contents



01

Beauty Rx

The medicalisation of beauty is leading to more demand for proof behind claims, creating value through ingredient-led products and driving the market for synthetic natural ingredients.



02

Evolved Self-Care

Beauty is intended to be uplifting and can contribute to a post-pandemic sense of self-care that includes sexual wellness, the hormone journey and wellness for every life stage.



03

New Rules Of Engagement

Brands should embrace disruption in the category to create new rules for engagement and building communities, allowing for more playfulness, experimentation and DIY.



01

Beauty Rx

The medicalisation of beauty is leading to more demand for proof behind claims, creating value through ingredient-led products and driving the market for synthetic natural ingredients.

What's happening now

The pandemic drove the desire and adoption of at-home treatments as consumers didn't want to sacrifice their beauty routines; rather, they wanted professional results they could perform themselves. As normalcy returns, consumers will still want the convenience and access that retailers can afford by offering more professional services. As the hunger for more efficient and potent products and treatments grows, consumers will look further and deeper to find proof that their money is being well spent. The rising influence of professionals and the democratisation of science serve to educate consumers and make more information available to them.



High-end, UK department store **Selfridges** recently opened the By Dr Vali 360 Experiential Centre providing access to innovative skin, face, smile, hair, body and wellness treatments all provided by a team of doctors and expert clinicians.

Source: selfridges.com



Launched in China in June 2022, the **YOUNGMAY SpaceTime Hydro Lifting System** is a micro-needling device with specialised serums that mimic mesotherapy at home. It is designed to help active ingredients further penetrate the outermost layer of the skin for better efficacy.

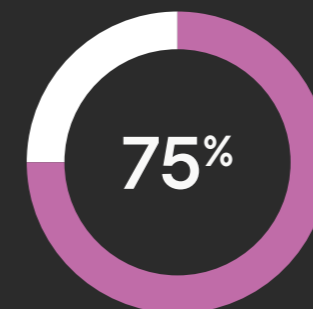
Source: tmall.com

Shiseido's Bio-Performance collection uses Second Skin innovation to non-surgically target undereye puffiness. The 3D-Fix Technology creates a new layer of bio-skin that integrates seamlessly with natural skin to remodel, smooth and firm.

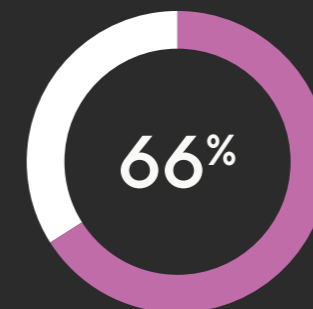
Source: Shiseido



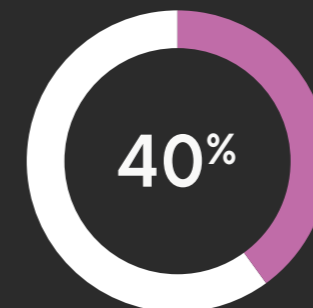
Consumers look for convenience and proof that their money is being well spent



of Spanish consumers agree that beauty brands should provide more scientific evidence to validate the claims they make (eg reducing wrinkles).



of Indian consumers agree it is acceptable to have non-invasive surgery to improve your appearance (eg skin laser treatment, Botox).

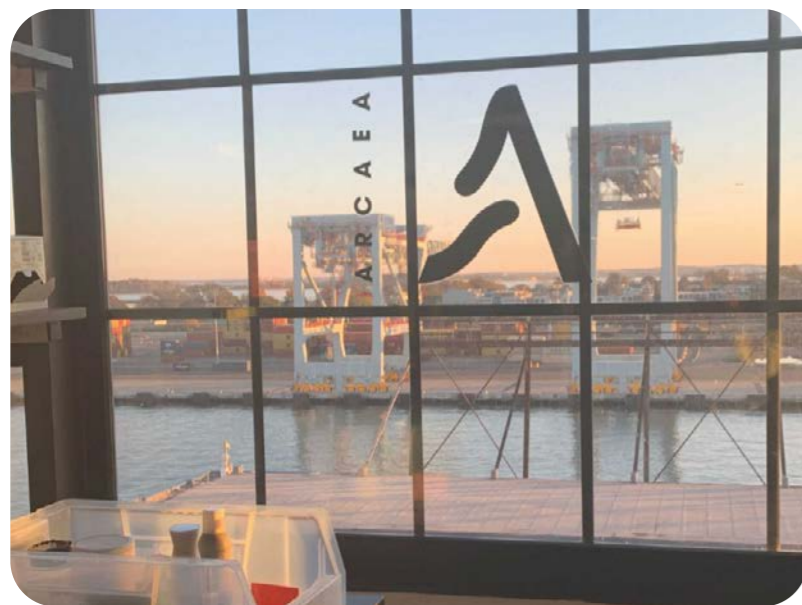


of US consumers who follow beauty influencers use TikTok for beauty information because they say it's educational.

Base: 1,000 Spanish internet users aged 16+; 1,000 Indian internet users aged 18+; 247 US internet users aged 18+ who use TikTok for beauty information
Source: Mintel Global Consumer, Beauty, Personal Care and Household, September 2022; Mintel Reports US, Beauty Influencers, 2021

What's next

Beauty brands will continue to invest in technology, whether it is for ingredient development, devices or new digitally-driven technology. Advances in biology will lead to the next generation of products with proven efficacy. Additional consumer education will appeal to those beauty shoppers already primed for new information and looking for the next greatest innovation.

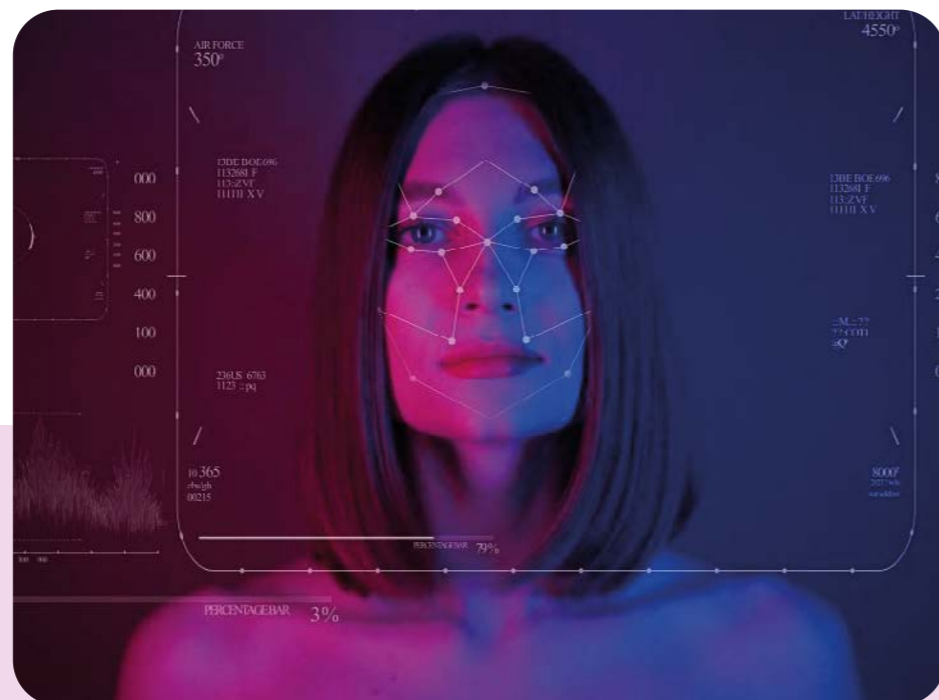


Arcaea is a biology-driven approach to beauty that aims to use DNA sequencing, biological engineering and fermentation to develop new ingredients and products. Leading beauty companies like Chanel and OLAPLEX have already invested in the Boston-based company.

Source: arcaea.com

L’Oreal partnered with Verily to leverage big data and skin sensors to more accurately predict skin health conditions and develop diagnostic tools.

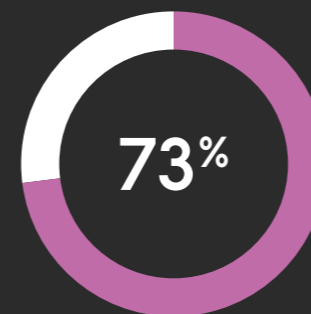
Source: L’Oreal



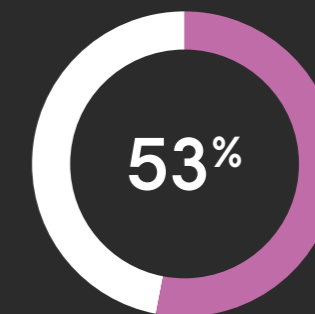
Shiseido is researching the potential of skin diagnostics through skin bacteria, taking the concept of the ‘biome’ to the next level. Indigenous skin bacteria is like a fingerprint and could allow for super-premium personalisation.

Source: corp.shiseido.com

Value in ingredient-led products



of Chinese women who pay attention to beauty ingredients say it is fun to learn about different ingredients in beauty products.



of US BPC users research ingredients to better understand the effectiveness of products.

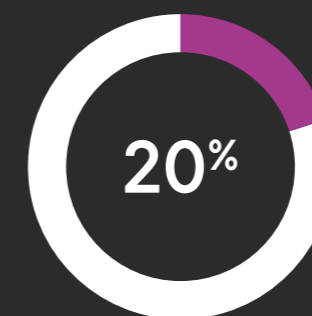
Base: 2,913 Chinese female internet users aged 18-59; 1,545 US internet users aged 18+ who research ingredients used in products
Source: Mintel Reports China, BPC Ingredient Knowledge, 2022; Mintel Reports US, Ingredient Trends in Beauty and Personal Care, 2021

Future forecast

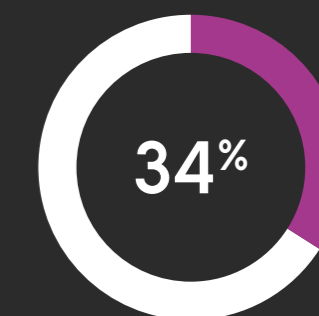
With the emergence of genetic sequencing and advances in diagnostics and wearable devices, there has been a swell of excitement around 'precision medicine' or 'customised' healthcare. This could have big implications for the beauty industry. There are opportunities in hormones, health risk and diagnosis, wearables, 3D printing, personalised vitamins and supplements, and gene editing.

Synthetic biology technologies are finally maturing, becoming the way almost anything can be manufactured competitively and sustainably. For example, according to The Journal of Clinical Investigation, researchers are looking into the possibility of skin microbiota transplants to solve skin problems. Businesses must learn to use 'syn-bio' to develop new products and processes, improve existing ones and reduce costs to remain competitive in the future.

Growing potential for synthetic biology technologies and precision medicine



of US Consumers recognise lab-grown, nature-identical ingredients as effective (20%), safe (22%) and trendy (21%).

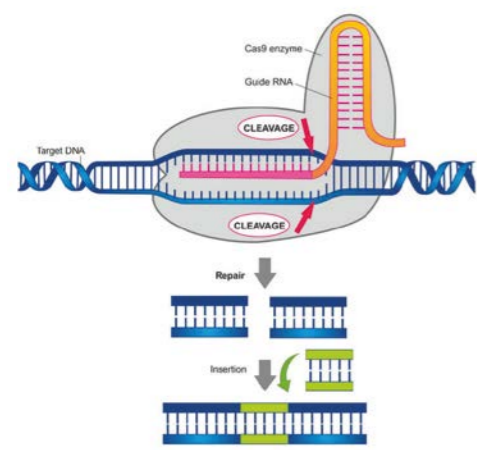


of UK skincare users would be interested in using formulas personalised to their needs.

Base: 1,910 US internet users aged 18+ who used BPC products in the 12 months to Aug. 2021; 1,451 UK internet users aged 16+ who used facial skincare products in the 12 months to Sept. 2021
Source: Mintel Reports US, Ingredient Trends in Beauty and Personal Care, 2021; Mintel Reports UK, Skincare Ingredients and Format Trends, 2021

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The cosmetics industry is looking for greener ingredients as consumers demand more sustainable products. When interviewed by Labiotech.eu, Jon Kratochvil of ERS Genomics said that **CRISP-Cas9**, a highly precise gene-editing technology, could one day meet the demand for nature-based cosmetic ingredients using standard biotechnology facilities.

Source: labiotech.eu

Engineers at the **University of Pennsylvania** have developed a way to brush teeth using lots of tiny robots. The system uses magnetic fields to manipulate iron oxide nanoparticles to form bristles or floss and it can even release antimicrobials to kill bad bacteria in your mouth.

Source: grasp.upenn.edu

Toothbrushing Microbots

Innovative robotic "swarm" technology improves oral hygiene

- 1 Align**
Iron nanoparticles self assemble in the presence of a magnetic field
- 2 Take Shape**
Manipulating the magnetic field changes bristle shape to adapt to teeth and gums
- 3 Kill Microbes**
Nanoparticles generate free radicals and eliminate pathogens
- 4 Brush and Floss**
Mechanical scrubbing disrupts dental plaque on and in between teeth



02

Evolved Self-Care

Beauty is intended to be uplifting and can contribute to a post-pandemic sense of self-care that includes sexual wellness, the hormone journey and wellness for every life stage.

What's happening now

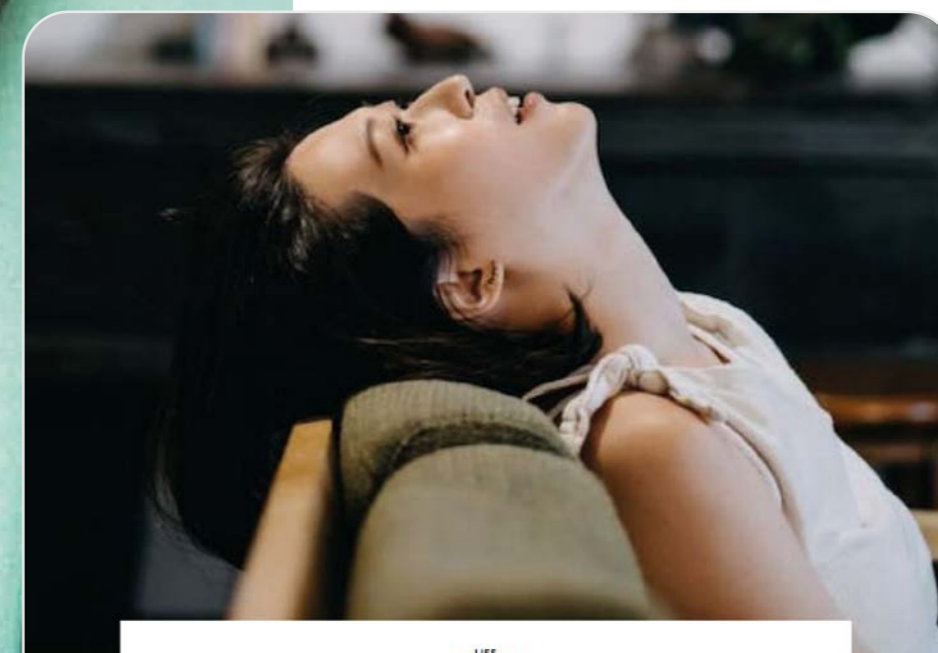
With more time at home over the last few years, consumers' routines have expanded. The stress of a global pandemic, combined with lifestyle shifts, has led to a new embracing of wellness and self-care rituals and products. As we move back to a state of 'new normalcy', the amount of time consumers have available to spend on wellness routines is contracting.

When faced with stress and upheaval, consumers look to find ways of lifting themselves up and beauty is the perfect product category to support that. The 'lipstick index'—a financial indicator that uses cosmetic sales to forecast bear markets or recessions—shows that sales of lipstick rise in times of economic uncertainty as consumers look to find simple, inexpensive ways to treat themselves.

Retail has the opportunity to continue its evolution and cement itself back into shopper routines with wellness offerings.

No matter the approach brands and retailers take, it's critical to ensure that all consumers feel seen and spoken to. Identity, representation and body positivity are changing the way consumers see themselves but also the way in which they want to be marketed.

Research by Starling Bank in the UK found that one in five under-35s are 'downsizing' their lifestyles because of the cost of living crisis. It also found that young adults are around twice as likely as over-55s to say they are using credit cards to help them cope cope and that they feel stressed about budgeting, with women in particular reporting that money worries are causing them sleepless nights.



“I can't keep living like I used to”: what 'downsizing' your social life looks like for women in a cost of living crisis

Source: [stylist.co.uk](https://www.stylist.co.uk)

Using simple formulas, a source-to-bottle philosophy and ingredients from Himalayan locales, Pahadi Local in India creates luxurious skincare products that are good for both consumers and the planet.

Source: pahadilocal/Instagram



A new website called Mental (clubmental.com), from a former editor of Women's Health magazine, Amy Keller Laird, is a resource for all things at the intersection of lifestyle and mental health.

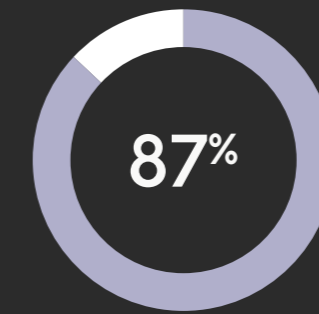
Source: club_mental/Instagram



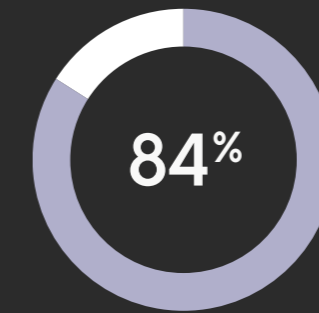
Allkinds is an Australian BPC brand that saw an opportunity for a new generation of self-care that supports kids, teens and tweens in feeling their best every day.

Source: allkinds.com and allkinds/Instagram

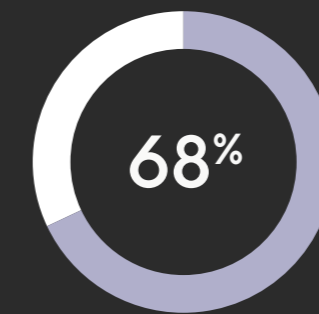
The impact of BPC on mental wellness



87% of Chinese consumers are actively seeking ways to reduce stress.



84% of Indian consumers agree that using beauty and personal care products makes them feel good about themselves.



68% of French consumers say that looking good makes them feel more confident.

Base: 1,000 French internet users aged 16+; 1,000 Chinese internet users aged 18+; 1,000 Indian internet users aged 18+
Source: Mintel Global Consumer, Beauty, Personal Care & Household, March 2022; Mintel Global Consumer, The Holistic Consumer, September 2022

What's next

The importance of community will continue to grow post-pandemic as people look to reconnect with like-minded individuals and want to feel a part of the collective. No longer will a singular approach to wellness be acceptable. The concept of community self-care will gain popularity as people recognise the importance of helping one another as a way to help everyone live better and feel better.

This concept will apply to everyone, regardless of age, gender or life stage. For example, as the topics of hormones, periods and hot flashes become more socially acceptable, brands will be more open to having honest conversations with their consumers, providing them with products that address their needs, as well as useful information to make their lives better.



The world's first luxury intimate care brand, **TWO L(I)PS** opened a physical store in Singapore in December 2021 dedicated to vulva care.

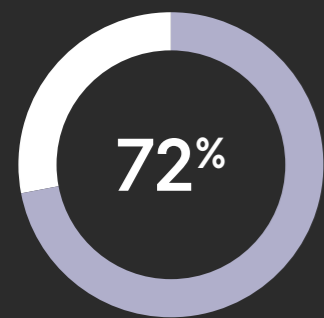
Source: sgmagazine.com

Health food retailer **Holland & Barratt** launched a campaign and pledge to offer free menopause consultations across the UK and trained over 4,000 menopause advisors.

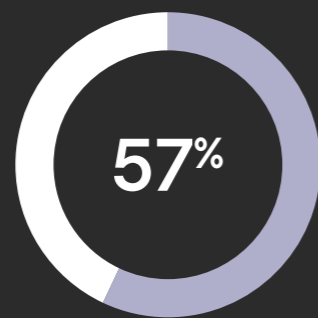
Source: theretailbulletin.com



Consumers want a more inclusive definition of beauty



72% of US consumers say society's idea of beauty is too rigidly defined.



57% of US consumers say there needs to be more beauty products for people with mobility challenges.

Base: 2,000 US internet users aged 18+; 2,000 US internet users aged 18+
Source: Mintel Reports US, Diversity and Inclusivity in Beauty, 2021



Japanese cosmetics company **SHIRO** plans to open 'Minnano-Kojo' ('Everyone's Factory') in Sunagawa, Hokkaido, in May of 2023. With the aim of revitalising the community, the factory concept was based on feedback from nine workshops with local residents.

Source: h2w.hokkaido-np.co.jp

Future forecast

Global beauty companies are focusing on products for sleep and blood circulation and their connection to beauty, suggesting that more holistic approaches to beauty, such as creams or serums, aren't enough to give consumers beautiful skin. A combination of holistic habits and products is needed and something brands could further explore.



Shiseido announced the launch of new ingestible beauty brand INRYU, which aims to improve the overall health of the skin from the inside to support people in realising unique beauty and wellness throughout their lives. There are a total of three products: Advanced Radiance, Night Ritual+ and Laser Refine.

Source: Shiseido

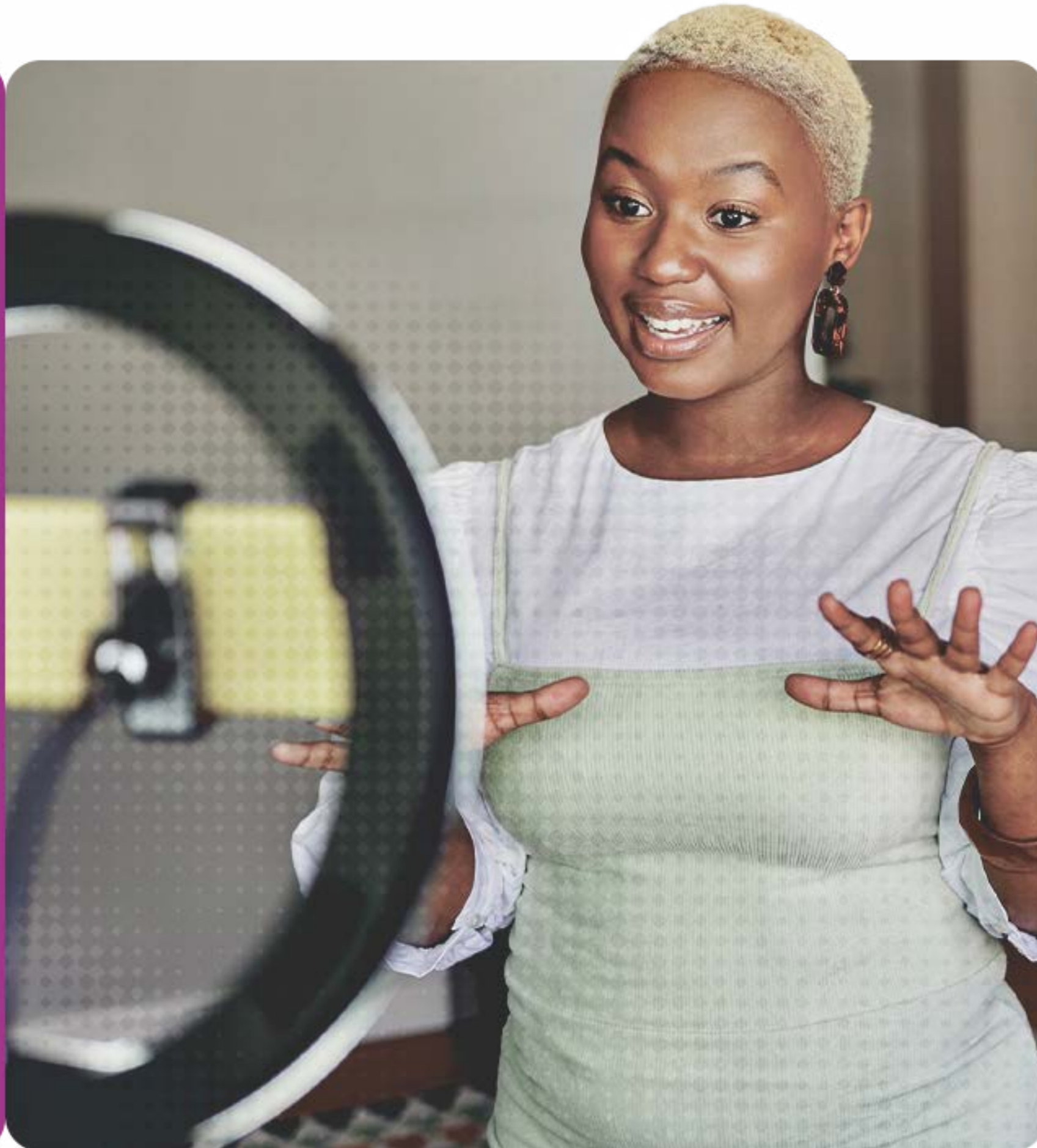
Vitalbeautie, a Korean beauty-food brand, joins traditional ingredients, modern technology and a 'philosophy that real beauty is nurtured inside to be expressed outside'. The brand says it has conducted multi-layer studies on customers' age, gender, body shape, lifestyle and psychology and developed original technology using heritage ingredients such as ginseng, green tea and soybean, solidifying its position as a trusted brand.

Source: amoremall.com



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03

New Rules Of Engagement

Brands should embrace disruption in the category to create new rules for engagement and building communities, allowing for more playfulness, experimentation and DIY.

What's happening now

Shopping behaviours have shifted away from bricks-and-mortar stores out of necessity. Post-pandemic, retailers are looking to bring value back to the real-life shopping experience beyond what consumers can get online. The storefront is no longer just about selecting a product; it needs to be engaging, fun and exciting. Direct-to-consumer (DTC) brands thrived during the pandemic, but the cost of acquiring new customers is growing, leaving DTC brands forced to evolve in order to remain relevant.



Kose is to open its Kose Beauty Studio inside Kidzania Tokyo in October 2022. The space allows children to experience working as a beauty or hair artist at Kose.

Source: Kose

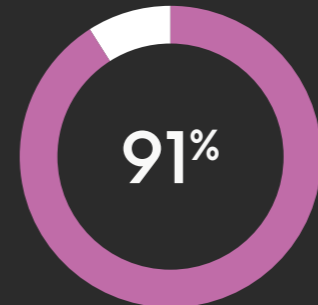


Launched in August 2022, **FOOPE** offers vegan fragrances that claim to be affordable yet luxurious and good for the skin and environment. The brand offers a five-day try before you buy programme.

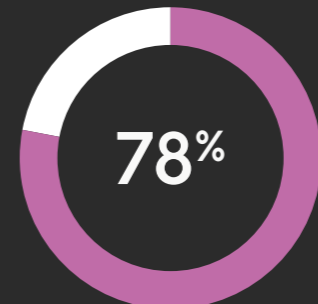
Source: FOOPE



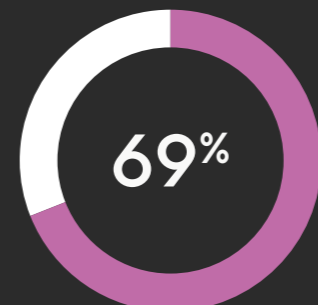
'Feel-good' factor of beauty and personal care



of German consumers find it comforting to use familiar products.



of French consumers think having professional treatments is enjoyable.



of Spanish consumers say that shopping for new products boosts their mood.

Base: 1,000 French internet users aged 16+; 1,000 Chinese internet users aged 18+; 1,000 Indian internet users aged 18+
 Source: Mintel Global Consumer, Beauty, Personal Care & Household, March 2022; Mintel Global Consumer, The Holistic Consumer, September 2022

What's next

Experimentation drives engagement, and technology will usher in the next generation of experience, whether in the store or in the home. As online and offline formats continue to merge, technology will allow for the replication of experiences across channels with simple approaches, from RFID (radio-frequency identification) to digital avatars and the metaverse.



Vending machines powered by artificial intelligence (AI) are already popping up in countries like Japan, appealing to Gen Z consumers with large touchscreens and cashless payments. With the emergence of AI in vending machines, brands are able to offer customers a suite of machine learning features that increase efficiencies, including augmented reality (AR), product recognition and usage analytics.

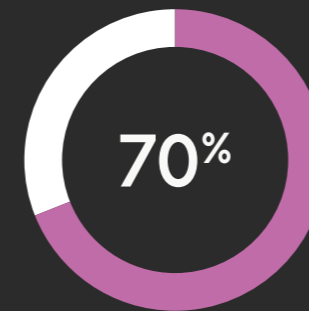
Source: thesundaily.my

Thailand's duty-free retailer King Power Group is launching an offline-to-online (O2O) store called **Firster** for beauty and lifestyle enthusiasts, highlighting the omnichannel shopping experience.

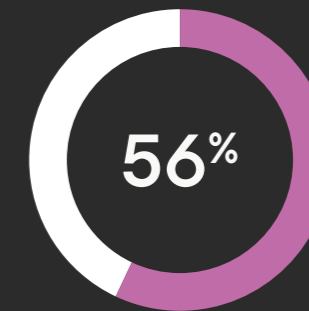
Source: Kose



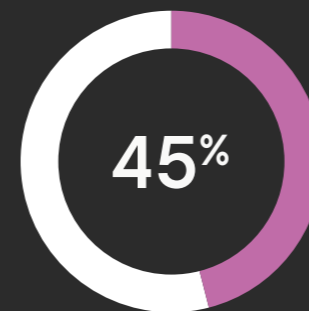
Building beauty communities online



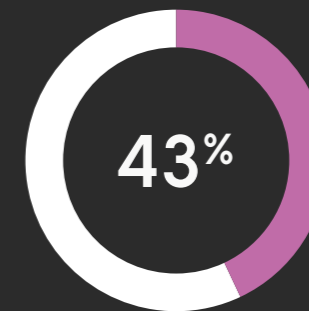
of Mexican consumers enjoy discovering new beauty and personal care products.



of Nigerian consumers enjoy connecting with other members of a brand community on a digital platform.



of Italian consumers aged 16-34 enjoy giving their opinions on beauty or grooming products/routines on social media.



of Singaporean consumers have joined a brand community just to purchase a product and then formed an emotional connection to it.

Base: 1,000 Mexican internet users aged 18+; 319 Nigerian internet users aged 18+ who participate in beauty communities; 1,000 Italian internet users aged 16+; 138 Singaporean internet users aged 18+ who participate in beauty communities
Source: Mintel Global Consumer, Beauty, Personal Care and Household, March 2022; Mintel Future Forward Leadership Strategic Brief: Community, 2022

Future forecast

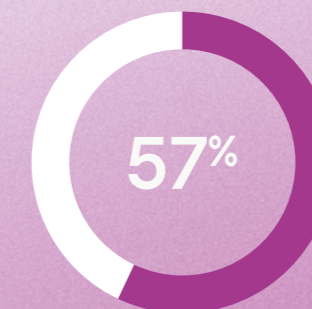
AR will continue to provide intriguing 'phygital' (physical and digital) experiences that bring fantasies into the real world. The development of virtual reality (VR), in terms of technology, hardware and content, will be exciting if it becomes convenient and practical enough for consumers to use every day. Brands could use these technologies strategically to create 'phygital' experiences that will eventually dominate the way consumers discover, shop and connect with brands.

Brands must anticipate significant changes in consumer expectations and behaviour, with technology influencing the way consumers and brands engage with one another. While the rules of the metaverse are still being worked out, its strengths lie in the communities that it builds and how people engage in them. Just like gaming has done with games like Roblox and Minecraft, leveraging social interaction will be key for brands.

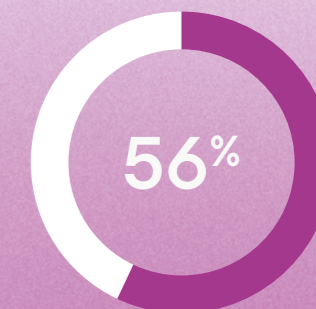


Experimenting in the metaverse

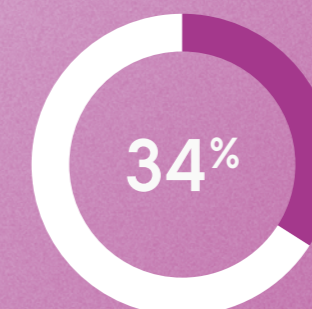
"I would be interested in trying things in the metaverse that I would not try in real life."



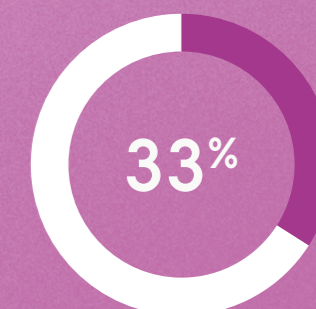
Brazil



Mexico



Spain



Italy

Base: 1,000 Brazilian internet users aged 16+; 1,000 Mexican internet users aged 18+
Source: Mintel Global Consumer, The Holistic Consumer, September 2022

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