Cosmetic Industry in Figures 2022

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Cosmetics and Skincare Drive Growth

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2022 saw a better performance for the toiletry and beauty markets after a tough post COVID 2021.

The industry is now worth £8.94 billion up 5.4% year on year, this is a considerable improvement from a -1.6% decline 2021 v 2020. Some inflation boosted this top line performance as we see actual packs purchased down 2.4%, so we should not get too excited!

Standout categories were the beauty markets with cosmetics growing 9.3% year on year closely followed by skincare at 8.4%. Fragrance also performed well with an 8% increase in value but could still do better at the crucial Christmas period.

Haircare, with our changing usage, struggled with growth of 1.5% and the rest of toiletries at 1.2% year on year, below the inflation rate.

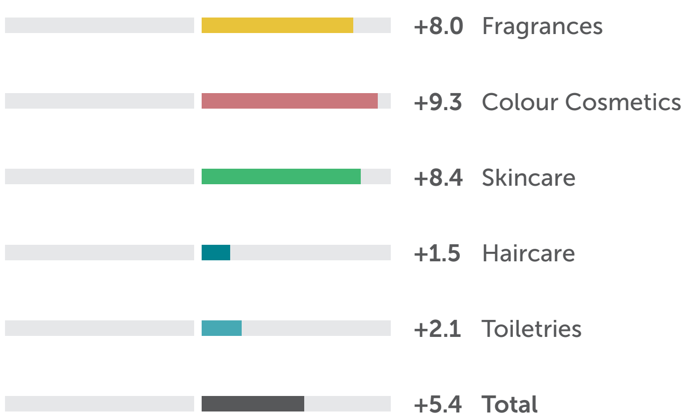
Given the challenge of less spending power in the population, we can consider 2022 a reasonably good year. Whilst value will be important in 2023, we still want to pamper and treat ourselves and we are prepared to shop around for the best bargains.

Figures compiled through a collaboration with kantar.com and circana.com for CTPA.

By Value at Retail Sales Price (rpi)

	£000s	
	2021	**2022**
Fragrances	1,702,969	1,838,792
Colour Cosmetics	928,081	1,014,075
Skincare	2,224,111	2,411,048
Haircare	1,261,605	1,280,762
Toiletries	2,371,206	2,400,171
Total	**8,487,972**	**8,944,849**

Sector Year on Year % Change by Value



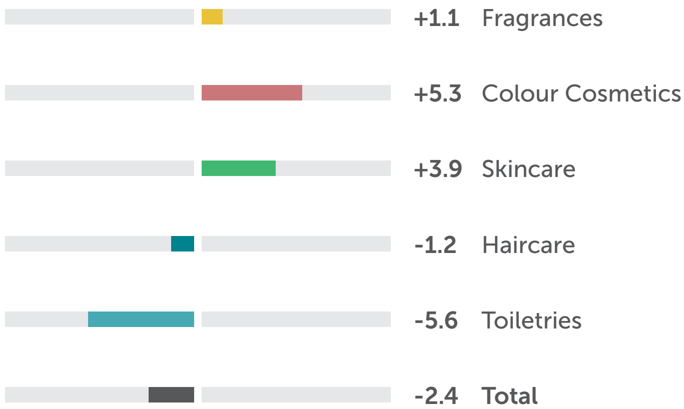
Category Estimates December 2022 (£000s)

	£000s 2021	£000s 2022	% Change
Fragrance *	**1,702,969**	**1,838,792**	**8.0**
Female Fine Fragrance	841,015	910,220	8.2
Male Fine Fragrance	565,065	621,236	9.9
Female Mass Fragrance	125,153	118,401	-5.4
Male Mass Fragrance	105,536	121,016	14.7
Unisex Fine Fragrance	59,229	61,297	3.5
Unisex Mass Fragrance	6,971	6,622	-5.0
* includes gift packs/coffrets			
Colour Cosmetics	**928,081**	**1,014,075**	**9.3**
Face	346,097	387,485	12.0
Lips	170,176	189,814	11.5
Eyes	315,745	336,022	6.4
Nails	80,323	87,177	8.5
Palettes/Gift Packs	15,740	13,577	-13.7
Skincare	**2,224,111**	**2,411,048**	**8.4**
Prestige Skincare Total inc Gift Packs	495,572	489,468	-1.2
Face Care Non-medicated	998,043	1,066,301	6.8
Face Care Medicated	84,864	86,528	2.0
Face Care Male	78,975	86,490	9.5
Hand Care	63,560	58,292	-8.3
Body Creams and Lotions	202,348	212,186	4.9
Baby Care Products	24,953	23,920	-4.1
Lipsalves	63,092	78,404	24.3
Sun Preparations	212,704	309,459	45.5
Haircare	**1,261,605**	**1,280,762**	**1.5**
Shampoo	473,747	485,753	2.5
Hair Colorants Inc Lightening	299,102	282,882	-5.4
Conditioners	308,897	318,315	3.0
Hair Sprays and Setting Sprays	87,154	94,005	7.9
Hair Creams/Waxes and Gels	69,361	76,727	10.6
Settings Lotions and Mousses	19,919	20,463	2.7
Home Perms	3,424	2,617	-23.6
Toiletries	**2,371,206**	**2,400,171**	**1.2**
Toothpaste	539,835	563,821	4.4
Depilatories	41,979	42,631	1.6
Foot Preparations	116,554	115,652	-0.8
Deodorants	515,214	595,642	15.6
Shaving Soaps	53,368	57,521	7.8
Mouthwashes	204,959	194,201	-5.2
Talcum Powder	15,893	16,430	3.4
Bath Additives	161,990	147,512	-8.9
Shower and Body Wash	353,848	340,196	-3.9
Liquid Soap	286,431	247,352	-13.6
Toilet Soap	81,134	79,215	-2.4
	8,487,972	8,944,849	+5.4%

By Unit sales

	000s Units	
	2021	2022
Fragrances	70,766	71,544
Colour Cosmetics	112,257	118,172
Skincare	461,472	479,569
Haircare	427,904	422,933
Toiletries	1,463,946	1,382,215
Total	**2,536,345**	**2,474,432**

Sector Year on Year % Change by Units



Sector Share 2022 v 2021

Methodology & Data Sources

Circana market tracking data:
Census EPoS data from Asda, Boots, Iceland, Morrisons, Sainsbury's, Superdrug, Tesco, Waitrose, Wilkinson, The Cooperative Group.

Sample EPoS data from Symbol Grocers, other Coops, independents and chemists.

Other data representation (audit and estimation methodology) from convenience stores, petrol forecourts, chemists and other impulse outlets.

Kantar Worldpanel Purchasing data (Worldpanel)
Individual purchasing data from a panel of 30,000 households which for this report will cover other GB outlets not mentioned in IRI tracking plus Aldi, Costco, Holland & Barrett, Lidl, Marks & Spencer, Savers, The Body Shop, bargain stores (such as Poundland, B&M Bargains, Home Bargains, 99p Stores) and other smaller outlets.

Kantar Beauty Panel
A panel of 15,000 individuals who record their purchasing of fragrances, colour cosmetics and skincare products across all relevant outlets (including department stores, Boots, The Body Shop, Internet, mail order and direct sales) via online data entry.

Report Definitions
Measures:
Value Sales = £ sold (in 000s)
% Chg = % change versus same time a year ago

Further Details
Circana circana.com
Kantar Worldpanel kantar.com

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