

# Trends 2025



## Beauty & Personal Care

**48%**

of UK sun care users would be interested in an app that can be used to track changes in their skin or moles

**28%**

of French consumers aged 16-24 are interested in dry use soap, bath and shower products

**57%**

of US personal care consumers buy natural and organic personal care products because they don't contain unnecessary ingredients or chemicals

**30%**

of US women say they are interested in trying a facial skincare product with integrated diagnostic tools

**72%**

of Chinese facial skincare users want to improve their skin by improving the quality of their sleep

# Trends 2025

## Beauty & Personal Care

In a future where the line between human and technological device blurs, water is a protected resource, energy concerns ring true and natural ingredients take centre stage, how will beauty brands innovate to stay competitive?

Mintel reveals the four key trends set to impact the global beauty and personal care industry over the next decade, discussing how the dynamic relationship between consumers and brands will not only evolve the industry, but revolutionise it like never before.





# THE ESSENTIAL RESEARCH TOOL FOR THE BEAUTY INDUSTRY

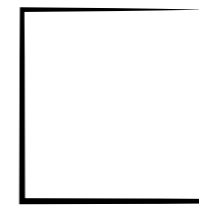
Innovation ideas

Consumer insights

Market developments

Trend forecasting

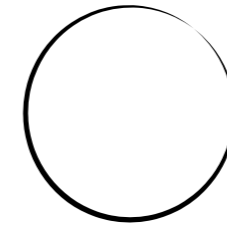
BOOK YOUR FREE  
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3,000 BEAUTY BRANDS IN  
FINDING OUT WHAT'S NEXT



02

## AUGMENTED HUMAN

The line between human and technological device is blurring as smart technology puts people in greater control of their individual health and beauty needs.



04

## WATER: THE NEW LUXURY

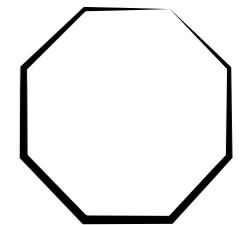
Water is set to become a precious commodity as consumption outstrips supply. The more consumers become aware of this, the more beauty brands will need to change how they manufacture and formulate products to limit their dependence on water.



06

## POWER PLAY

Consumers are facing an energy crisis as the pace of modern life catches up with them. Aware of consumers' need to make long-term lifestyle changes to address falling energy levels, beauty brands are delivering products that put energy claims at the forefront of their message.



08

## GASTRONOMIA

The saying goes, 'it's what's on the inside that counts'. Interest in natural ingredients is on the rise as more people dare to roll up their sleeves and get involved in the process of creating beauty products.



# Augmented Human



Birchbox, Google Cardboard

Imagine a world where humans and beauty products are so connected that the entire home is a working laboratory. Bathroom mirrors automatically assess what consumers need to put on their skin and hair, on-demand DNA analysis explains how products work in the short, medium and long term, devices whip up the perfect combination of ingredients and dispense them in the ideal format or pump them out via the shower head, and high-res scanners and 3D printers help users track results over time. This bathroom laboratory is closer to existing than people might think, thanks to ongoing work with augmented and virtual reality, diagnostics, tracking devices and customised formulations.

The rise in popularity of wearable technology has given consumers an unprecedented insight into the inner workings of their own body. Mintel research shows that 18% of Chinese consumers own a wearable device, up from 13% in 2014. What's more, nearly half (48%) of UK sun care users would be interested in an app that can be used to track changes in their skin or moles.

As consumers become more and more familiar with using technology to track their health and well-being, they are looking for beauty brands to offer products and devices that boast similar functionality. In fact, 30% of US women say they are interested in trying a facial skincare product with integrated diagnostic tools.

As this demand grows, DNA analysis will be refined to assess how the body will age and allow consumers to work with manufacturers to help delay or offset chronological changes. This will be supplemented by high-resolution imaging systems which scan the skin, for example, and then print an image of the face in 3D, allowing consumers to feel, as well as see, the texture of the skin. Consultants could then encourage consumers to return to the store on a regular basis and receive further printouts, allowing them to see if the products are working on aspects such as reducing the number of wrinkles and pore size.

In the future, beauty devices will move underneath the surface of the skin, with implants that provide additional hydration, nutrition and protection from the elements over a sustained period. Furthermore, advancements in technology will trickle down from the laboratory to the retail space, helping improve the shopping experience. This is especially true among consumers who have experienced similar products and services before: 64% of Chinese consumers who buy luxury goods are interested in interactive or digital experiences available in-store such as virtual mirrors, virtual reality headsets and interactive displays. In the UK, 13% of consumers – rising to 23% of female consumers aged 16-24 – who have had hair treatments or services in a salon are interested in using smart mirrors to digitally view their desired style or colour before committing to an appointment.

New product development in augmented reality is providing the next generation of virtual mirrors and virtual concierge services. Sephora's new smaller Flash 3.0 store concept on Paris' Rue de Rivoli goes some way towards this, welcoming shoppers with a mini robot, which encourages them to browse the shelves or a digital catalogue, download their selections into a virtual basket via near field communication (NFC) cards and then collect their products in-store or have them delivered to their homes. Subscription service Birchbox, meanwhile, has extended its partnership with Google Cardboard, providing VR headsets with selected beauty boxes.

As consumers rely more on technology to enable them to play a greater role in health and beauty management in the coming decade, it will be up to brands to guide them on their journey. Retailers will have to ensure that in-store smart technology has a practical benefit for shoppers, rather than just being seen as a novelty. With new technology enabling consumers to track the impact of beauty products, brands will be under greater pressure to prove efficacy.

# Water : The new luxury

At current consumption rates the World Wildlife Fund estimates that by 2025 two thirds of the world's population could be at risk of water shortages. In a future where water becomes a protected resource, bubble baths and lawn sprinklers will become unthinkable luxuries and rationing will be second nature to people everywhere.

Consumer awareness is on the rise, and water conservation is high on their agendas. In the UK, one third (33%) of consumers say they would pay more for fixtures that save on water or energy bills, while 27% always try to take shorter showers. An additional 27% of UK consumers use less or reuse water.

As consumers cut back their usage they expect brands to do the same, and some are already taking notice. Where water was once an essential part of any beauty regime, new formulations require little or no extra water in order to function.

Cleansing and treatment face powders currently require only a splash of water to transform into rich creams or lathers. Already, we are seeing the rise of water-saving beauty solutions such as wipes, dry shampoos, non-rinse body washes, and alternative toothpaste formats.

But the next generation of products will work without any water at all. Mintel research highlights the appeal

of such products, especially among younger age groups. In the UK, 13% of all consumers say they are interested in dry use soap, bath and shower products with interest rising to one quarter (24%) of consumers aged 16-24. There is even greater demand in France where 15% of consumers overall say they are interested in these products, rising to 28% of those aged 16-24.

There is also a growing interest in alternative water sources that do not place any additional strain on existing resources, and we will see brands scour the earth to gain a competitive edge. These products can be positioned as eco-friendly, as well as a source of exclusivity.

Brands will not only source water from different oceans, lakes, lagoons and glaciers, they will climb mountains and harvest fog to gain the purest possible droplets. Plant waters will also play a part, moving from traditional health drinks into beauty products, with the most extreme terrains offering super-strength solutions.

Brands will also need to focus on the transparency of their actions around the issue of water as sceptical consumers want access to the specific details of their water usage habits.

This focus on provenance will also include the production location, with brands detailing where their products are made, whether the water supply there is plentiful or compromised and whether the production methods save or recycle water.

Younger consumers will be the key market for future innovations. Brands can tap into their youthful idealism, passion and desire to change the world with products that clearly state how they are addressing the issue of water shortages.

There will be a greater need for brands to help consumers control their water usage and form better habits by creating devices that can switch off when an allotted amount of water has been used or can inform consumers when a certain amount of time has elapsed. Transparency will be key. Providing easy-to-access information about water usage will be something empowered consumers come to expect.

○ Nebia shower





# Power Play

As the pace of modern life accelerates at a faster rate than consumers can cope with, energy levels are becoming a key concern for many and fatigue is an unwelcome companion. But consumers are fighting back. In the coming decade we will see a two-pronged approach from those opting for significant lifestyle changes to address low energy levels while also seeking out products with energy-centric formulations that give them a boost.

Mintel research indicates that nearly four in five UK adults (79%) say they hate feeling low on energy. In the US,

tiredness or fatigue ranks second as a health concern, cited as a major issue by 28% of Americans.

The first approach some consumers will adopt is a more holistic approach to health and wellness issues. Rather than addressing problems individually, they will pursue a more healthy lifestyle as a whole.

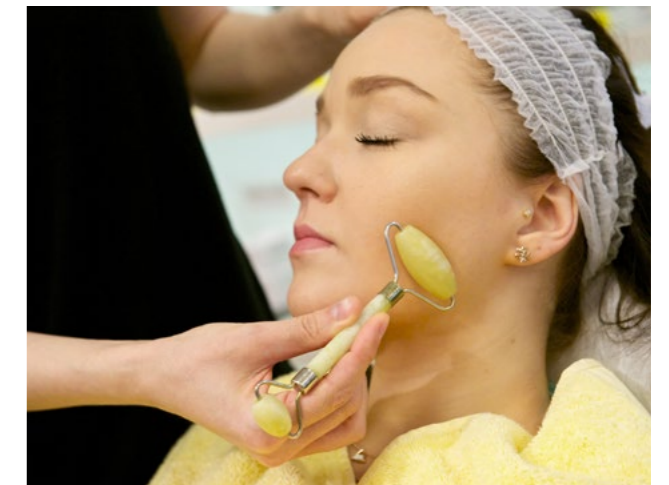
In China, facial skincare users make clear links between lifestyle, fitness and the condition of their skin, with 72% wanting to improve their skin by improving the quality of their sleep,

64% wanting to eat a more balanced diet and 59% wanting to get more exercise. Sleep, exercise and diet also top the list of Brazilian health issues with 74% of adults saying sleep is one of the top three factors of a healthy life, 49% pointing to exercise and 46% citing a balanced diet. More than one third of US men say they exercised more in 2015 than they did the year prior.

Secondly, consumers will increasingly look for products that complement their wider lifestyle shift. Indeed, energy claims are on the rise across the beauty and personal care (BPC) market.



△ Face Gym



According to Mintel Global New Products Database (GNPD), facial skincare products featuring energy claims represented 12% of global launches from January to October of 2015, up from 10.5% in 2014, while eye care launches mentioning energy grew from 13% to 15% of global launches over the same period. Also during the same time period, shampoo launches with an energy claim increased from 2.7% to 3.2%.

This presents even greater opportunities for brands in the future, including formulators. Work on energy-boosting products is already underway, particularly in skincare and

haircare products. The stage is set for more ambitious claims. RoC's Pro-Sublime Anti-Age Eye Perfecting Serum has used patented E-Pulse Technology inspired by electro stimulation to power the skin's natural repair systems, while Kanebo incorporates Advanced Energy Charge Technology to optimise cellular activity and support the reproduction of energy in the skin. Similar claims will start to appear in haircare, where brands will seek to improve the condition and longevity of the hair by stimulating cellular energy. A new generation of colour cosmetics will also emerge, enhancing the energy levels of the skin as well as its outer appearance.

Consumers are looking to improve their overall levels of health and wellness. Beauty brands will need to partner with food, drink and leisure brands to create healthy living product ranges with ingredients and claims that complement one another. Energy efficiency claims will be key in the coming decade. Brands will need to tangibly illustrate how their products can impact consumer energy levels for the better.



Beauty products are coming out from the shadows of laboratories and into the spotlight of consumers' kitchen counters. A new focus on natural ingredients will inspire an increasing number of consumers to roll up their sleeves and create homemade beauty solutions with the help of brands.

We have already seen an increased focus on, and the continuing

importance of, natural beauty. Indeed, Mintel research highlights that half (50%) of UK men believe facial skincare products with natural ingredients are better for the skin. Overall, some 42% of UK personal care consumers buy natural and organic personal care products because they believe they are better for the environment. In the US, 57% of consumers purchase them because

they don't contain unnecessary ingredients or chemicals. What's more, nearly half (48%) of Italian and Spanish consumers buy natural and organic personal care products because they believe the products are better for their health.

Attitudinal changes toward natural ingredients have acted as a catalyst in the rise of 'kitchen

beauty' – products that can be made at the kitchen table (or merely look like they have been), but still reflect the latest cosmetic understanding – and is driven by a desire for consumers to feel in control of their beauty products.

Vlogger Michelle Phan's YouTube tutorial on homemade face masks and scrubs reached nearly 3 million views in 2014, demonstrating the overwhelming number of consumers who are already looking for homemade beauty 'hacks'. We'll also see traditional beauty and personal care remedies move into the mainstream as consumers start to 'cook up' their own versions at home, using kitchen utensils and every day ingredients.

This doesn't mean that brands can't engage with these consumers, but rather that their focus needs to shift to highlight artisanal processes while also doing the legwork and making it easier for consumers to construct products at home.

This will inspire beauty retailers to emulate supermarkets with aisles of natural ingredients in their raw and freeze-dried states to help consumers whisk up beauty products in their own kitchens and play with different textures and fragrances to give them an energy burst in the morning or calming treatment in the evening.

Brands are already taking note. Companies like Body Deli and Skin & Tonic are using batch production and minimal processing to ensure maximum freshness. From the manufacturer perspective, fresh formulations that concentrate on vitamins and nutrients and eschew preservatives will need to be produced in short batches and kept in the refrigerator to maintain their potency and freshness, while simultaneously offering a sense of immediacy to the consumer.

We will no doubt find some brands borrowing inspiration from the meal kits developed by food companies, propelling the subscription beauty box model to the next level. Consumers would receive complete kits of ingredients or phases of products, which can be combined to create a finished product.

Looking at the years ahead, we'll see beauty brands partner with homewares brands to create kitchen devices and storage products that have beauty brand approval. Beauty retailers will offer classes to teach people how to make their own products. With the ever growing interest in pursuing more natural lifestyles, consumers will find themselves getting involved in the creation process to ensure their beauty and personal care products are more transparent.

○ Skin & Tonic



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