

# PERSONAL CARE

KANTAR BRANDZ

PERSONAL CARE TOP 15:



**DEFINITION:**  
The personal care category includes brands in health and wellness; beauty; and facial, makeup, skin, hair, baby, and oral care.

## SITTING PRETTY/ BRANDS PUT A NEW GLOSS ON VALUE

Category Brand Value  
Year-on-Year Change

**+17%**

Personal Care Top 15  
Total Brand Value

**\$ 206,917 m**



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For now, rising prices will require mass personal care brands to draw on all their powers of brand equity. This is especially true in the highly price-conscious budget segment of the category, where family budgets have been especially squeezed by economy-wide inflation, and temptations are high to trade downward to generic options.

Price inflation has also created questions around the growing “mass premium” space, which encompass efforts by brands like Garnier and Pantene to play with more upmarket codes like “medical-grade,” “personalized,” “<10 ingredients” and “lab series”. The challenge is that now, “mass premium” products are rising to just a few dollars shy of many prestige offerings – which raises the risk that these “mass premium” products will ultimately just serve as a stepping-stone to competitor’s products. It doesn’t help “mass premium” customer retention, either, when retail partners add prestige “pop-ins” to personal care aisles in a bid to boost their own bottom line. In the US, these new “store-in-store” concepts include tie-ups between Sephora and the discount retailer Kohls; Ulta and Target; and UK luxury boutique Space NK, with Walmart.

The rise of prestige within this category was assured even before the COVID-19 pandemic. But since then, upper- and middle-class consumers alike have turned to prestige “self-care” indulgences with even greater vigor. This is especially the case in China, where luxury beauty products like lipstick and blusher proved a natural fit for the booming live-streamed retail trend.

Welcome, then, to the new “prestige boom.” Beauty-focused personal care conglomerates like L’Oréal, of course, have long developed more democratic propositions like Maybelline alongside more luxurious brands like Lancôme. But now personal care players like Unilever and Procter & Gamble are expanding their prestige offerings, too, in areas ranging from beauty to skincare to makeup to bathing products. After divesting itself of its prestige personal care holdings seven years ago, for instance, P&G has returned the space by acquiring the upmarket hair care brand Ouai, as well as clean skincare players Tula and Pharmacy.

At the same time, this moment feels different from last decade’s beauty startup acquisition bubble. That era saw conglomerates paying enormous sums to acquire mid-sized, influencer-touted brands like Becca and Too Faced - which then struggled to transition from local favorites to global players.

This decade, conglomerates are taking a more cautious approach, sometimes opting to pursue minority investments in promising personal care brands rather than buy them outright. These “slow and steady” acquisition processes can be better for all parties. They can provide smaller brands with important logistical support as they figure out how and whether they want to scale up – without the pressure to start raking in cash overnight. At the same time, the minority investment model allows the conglomerate to learn more about whether the smaller brand is truly a good fit to scale up globally, should a later acquisition occur.

L’Oréal, meanwhile, has begun to turn its acquisition focus to more early-stage beauty startups – another strategy that reduces the risk of overpaying, while still helping L’Oréal to grow its portfolio in new directions. In December 2021, for instance, L’Oréal acquired vegan, “superfood”-focused skincare brand Youth To the People, which had been pulling in around \$50 million per year in sales.

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## BRAND SPOTLIGHT

### MAYBELLINE NEW YORK

Taken together, Garnier and Maybelline, which are both in the L'Oréal brand stable, demonstrate several paths forward for the marketing of mass Personal Beauty brands.

Maybelline has been able to engineer viral product launches – and drive sales – around a perception that its products perform just as well as luxury brands, at a fraction of the price.

It is one of the most tried-and-true marketing messages in the book – “Get more while paying less!” – but it’s been given a more participatory spin in the TikTok era, where people film themselves trying out products like Maybelline’s Sky High mascara alongside more expensive competitors.

2022 BRAND VALUE

**\$5,983M**

New

Offers a value proposition

Price Index Global Beauty Brands

Estée Lauder	121
Lancôme	119
Clinique	119
L'Oréal Paris	113
Shiseido	111
Garnier	96
<b>Maybelline</b>	<b>84</b>

Fair Price Index



Superior performance + great comms drive its purchase power

Maybelline Sky High Mascara was a sell out global sensation in 2021 after going viral on TikTok with videos viewed more than 400 million times.



## BRAND SPOTLIGHT

### GARNIER

Garnier’s product offer has long highlighted natural ingredients: it introduced its first all-plant-based shampoo, Ultra Doux, in 1982. And its logo and key brand marks have featured plant imagery since 2002.

In 2020, Garnier built on these associations by launching its Green Beauty Roadmap with commitments towards both environmental and social areas of concern.

2022 BRAND VALUE

**\$11,718M**

2021 Brand value \$9,134m

Green Beauty roadmaps Garnier’s End-to-End Journey towards sustainability in 5 key areas

More Solidarity Sourcing

Supporting communities producing Aloe Vera in Mexico, Coco butter from Ivory Coast.

Greener Sciences & formulas

By 2025 7% of products will be biobased, derived from abundant minerals or circular process.

Approved by Cruelty Free International

Renewable energy

Achieving a low carbon business model with 100% of industrial sites to be carbon neutral by 2025.

Fighting plastic pollution

Zero virgin plastics by 2025 and all packaging will be reusable, recyclable or compostable.



To sign post the above for consumers, Garnier is rolling out an **environmental and social impact score** for their products based on 14 planetary impact factors across the product life cycle.

Early days but some green shoots of progress

Brand is defined by the following factors in its key USA and French markets

## Sustainability Convenience

Brand has shown improvements in sustainability perceptions in key areas



INDEX CHANGE PRE VS POST ROADMAP LAUNCH

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## ACTION POINTS/ BRAND BUILDING

### 1

#### PARTNER UP FOR SUSTAINABILITY

An especially intriguing tie-up from the past year is Estée Lauder's minority investment in British natural beauty brand Haeckels, which makes hair and body products from food waste and locally sourced seaweed, and has begun to grow its own packaging using a mushroom derivative called Mycelium. As personal care brands begin to push into sustainability, there is so much more that they can do in addition to pursuing carbon neutrality, as important as that is.

In fact, when we look at what people worldwide see as Personal Care brands' chief responsibilities within the UN's 'Sustainable Development Goals' (SDGs) framework, issues beyond carbon emissions predominate - with overconsumption, ocean micro plastic, animal welfare, and water pollution all rising to the top of consumers' minds.

### 2

#### PROTECT OUR FUTURE

Going forward, expect to see baby care at the forefront of consumer-friendly "mass sustainability" products, because of parents' inherent openness to products that will ensure a better world for their young children. Huggies, for instance, recently launched its first-ever biodegradable, natural-fiber baby wipe as part of its commitment to eliminate plastics from its range; in May 2021, meanwhile, Pampers launched its first ever hybrid diaper, which pairs reusable cotton covers with plant-based, leakproof disposable inserts. Clean labels, nontoxic packaging, the importance of "access for all" programs, the phasing out of plastic: it's all there in the diaper business.

### 3

#### PURSUE TWO-TRACK GROWTH

Going forward, mass personal care brands' growth strategies will run on two tracks: continuing to push into emerging markets, while doubling down on premiumizing innovation in more mature regions. Toothpaste brand Colgate, for instance, sees opportunity for education-based marketing in countries where per capita daily brushing rates remain low. And it has also announced a patterned with 3D-printed supplement company Nouris3d for a line of oral chews that "support teeth and enamel" while "giving you fresh breath."