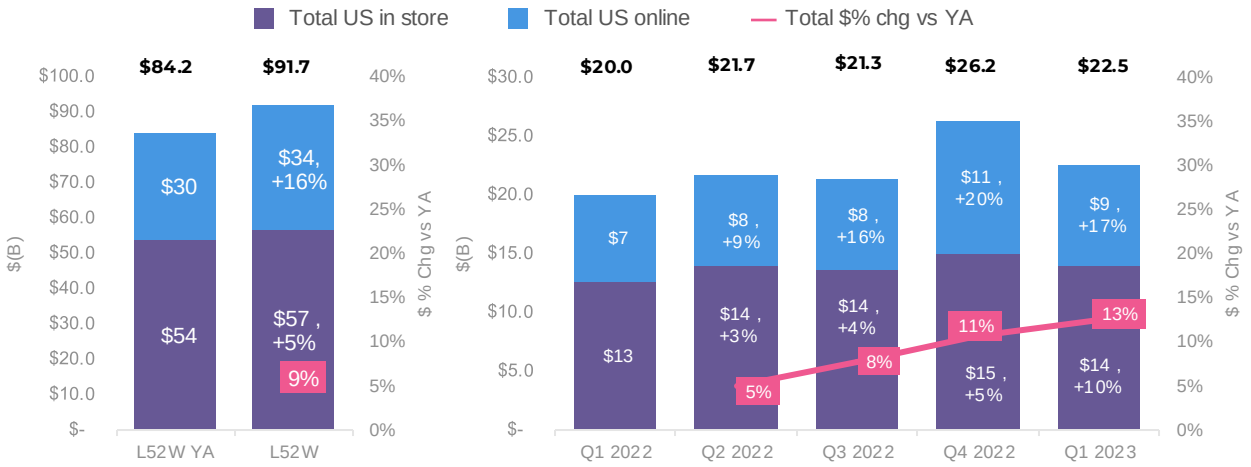
2023 Q1 Beauty & Personal Care Overview

Tracking the impact on FMCG and Retail

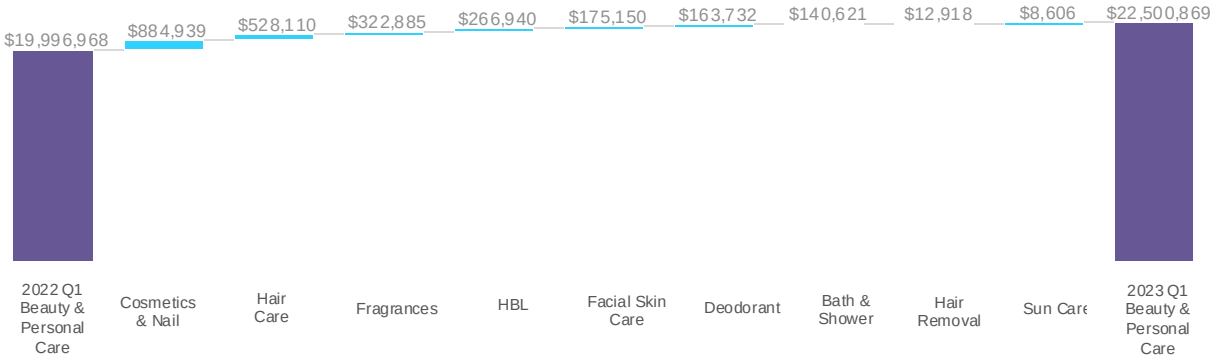
Beauty & Personal Care omnichannel overview



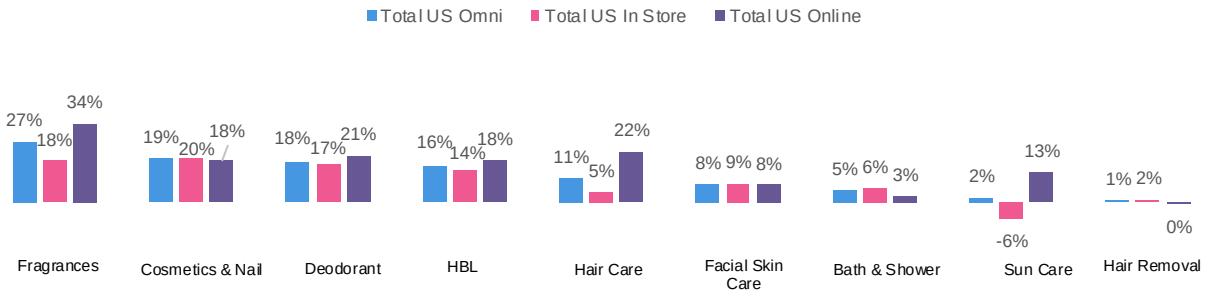
Key takeaway: Q1 lifts both in-store and online contributed to overall Beauty & Personal Care growth (+9%), with online (+16%) continuing to outpace in-store gains. Q1 Beauty & Personal Care performance, +13%, outpaced L52 week period, surpassing the growth of previous quarters in 2022.

Source: NielsenIQ Omnishopper; Beauty & Personal Care (Bath & Shower, Cosmetics & Nail, Deodorant, Facial Skin Care, Fragrances, Hair Care, Hair Removal, HBL, Sun Care) Total US Panel; L52 (WE 03/25/2023), L52 YAG (WE 04/02/2022), 2022 Q1 (WE 04/02/2022), 2022 Q2 (WE 07/02/2022), 2022 Q3 (WE 10/01/2022), 2022 Q4 (WE 12/31/2022), 2023 Q1 (WE 03/25/2023)

2023 Q1 vs 2022 Q1 Beauty & Personal Care category volume decomposition



Online vs Offline Q1 buying patterns ($ % chg vs YA)



Key takeaway: All Beauty & Personal Care categories experienced $sales growth this quarter. Online sales continues to be the driver of overall sales growth for most categories. Fragrances, Cosmetics & Nail and Deodorant continues to post strong growth.

Source: NielsenIQ Omnishopper; Beauty & Personal Care (Bath & Shower, Cosmetics & Nail, Deodorant, Facial Skin Care, Fragrances, Hair Care, Hair Removal, HBL, Sun Care) Total US Panel; L52 (WE 03/25/2023), L52 YAG (WE 04/02/2022), 2022 Q1 (WE 04/02/2022), 2022 Q2 (WE 07/02/2022), 2022 Q3 (WE 10/01/2022), 2022 Q4 (WE 12/31/2022), 2023 Q1 (WE 03/25/2023)

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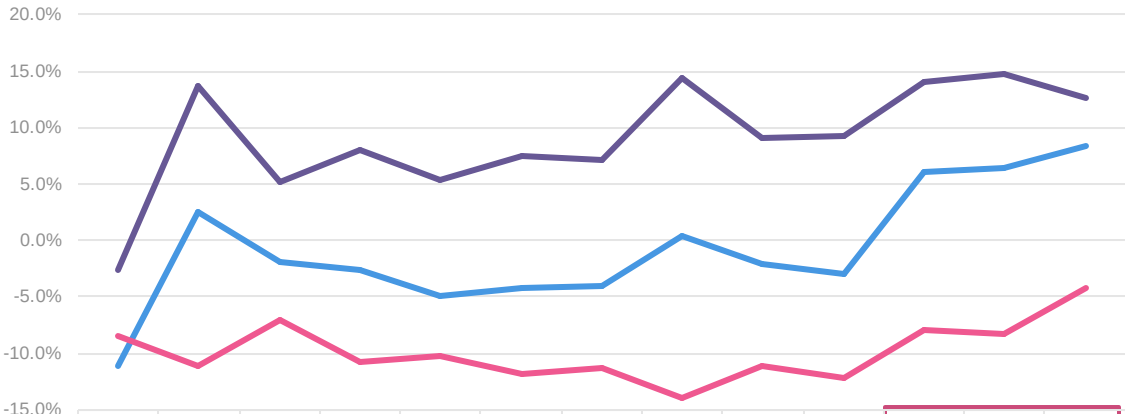
Q1 market dynamics

$ % chg vs U % chg

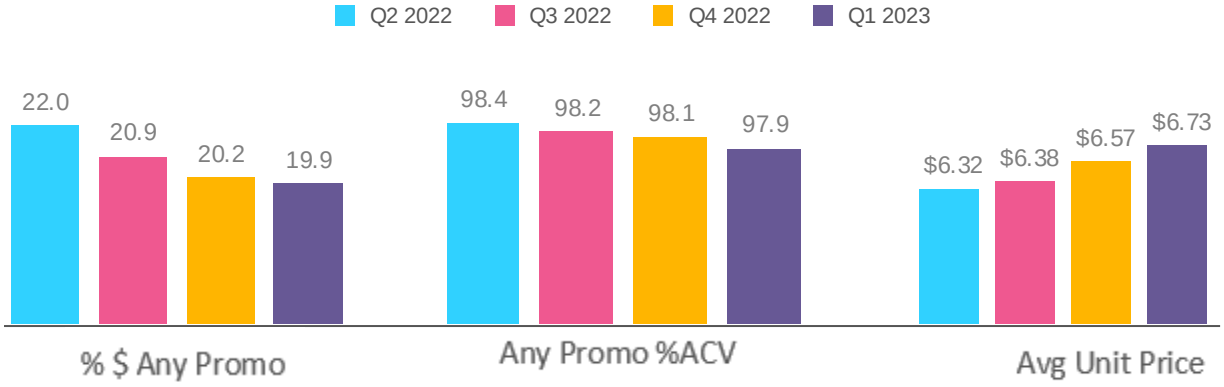


	P4 2022	P5 2022	P6 2022	P7 2022	P8 2022	P9 2022	P10 2022	P11 2022	P12 2022	P13 2022	P1 2023	P2 2023	P3 2023
$ % Chg vs YA	-2.7%	13.7%	5.1%	8.1%	5.3%	7.5%	7.1%	14.4%	9.1%	9.3%	14.1%	14.7%	12.6%
U % Chg vs YA	-11.1%	2.6%	-1.9%	-2.6%	-5.0%	-4.3%	-4.1%	0.5%	-2.1%	-2.9%	6.1%	6.5%	8.4%
Variance	-8.4%	-11.1%	-7.0%	-10.7%	-10.3%	-11.8%	-11.2%	-14.0%	-11.2%	-12.3%	-8.0%	-8.2%	-4.2%

2023 Q1

Source: NielsenIQ Omnishopper Beauty & Personal Care (Bath & Shower, Cosmetics & Nail, Deodorant, Facial Skin Care, Fragrances, Hair Care, Hair Removal, HBL, Sun Care) Total Available Retailers (In-store & Online); trended 4 week periods (2023 P3 4WE 03/25/2023)

Quarterly pricing and promotional dynamics



Source: NielsenIQ AOD; Beauty & Personal Care (Bath & Shower, Cosmetics & Nail, Deodorant, Facial Skin Care, Fragrances, Hair Care, Hair Removal, HBL, Sun Care) xAOC; 2022 Q1 (WE 04/02/2022), 2022 Q2 (WE 07/02/2022), 2022 Q3 (WE 10/01/2022), 2022 Q4 (WE 12/31/2022), 2022 Q1 (WE 03/25/2023)

In the news

The New York Times

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Nov 3, 2022

Key takeaway: As inflation and layoffs remains very top of mind, we see the gap between Beauty & Personal Care Dollar and Unit Sales narrows. For the first time in a year, unit sales are showing positive growth. Dollar sales continues to grow and outpace Unit Sales which experienced growth in Q1, 2023, despite less promotional activity and average unit prices continues to increase.

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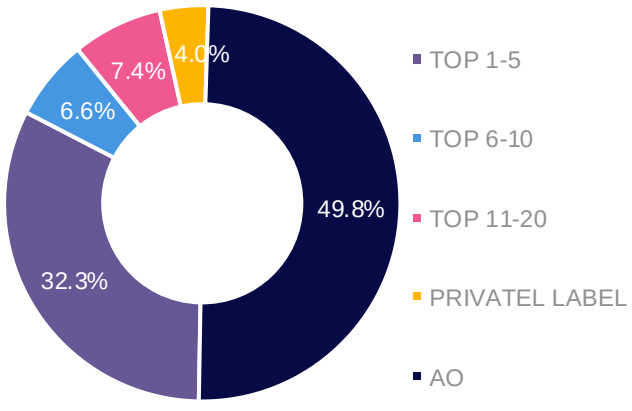
2023 Q1 category Winners and Losers

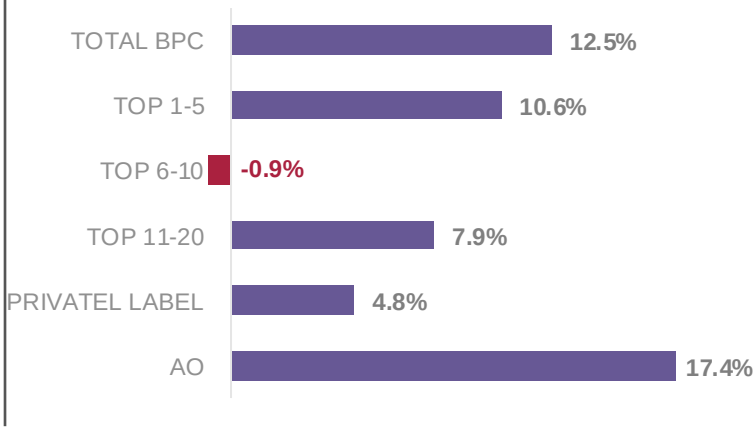
$ % Growth		$ % Decline	
Body Spray	+32%	After Shave	-26%
Face Cosmetics	+30%	Hand Sanitizer	-24%
Lip Cosmetics	+25%	Electric Razor	-9%
Cologne & Perfume	+25%	Nail Appliances	-9%
Body Lotions & Trmts	+16%	Self Tanner	-6%

Manufacturer performance

$ Shr Contribution



$ %Chg vs YA



Key takeaway: Q1 23 experienced significant growth across a few categories, with cosmetics and fragrances being the main stand outs. We also see Body Lotion and Treatments increases in $sales this quarter, which may be driven by seasonal purchasing behaviors.

After Shave, Electric Razor, and Nail Appliances experienced declines this quarter, which could be driven by the reduced need to repeat purchase. Additionally, Self Tanner and Hand Sanitizer also experienced declines this quarter.

The top 20 manufacturers contributed 46.3% of the $share, while smaller manufactureres outpaced Total FMCG, experiencing 17.4% $Sales growth this quarter.

Source: NielsenIQ Omnishopper; Beauty & Personal Care (Bath & Shower, Cosmetics & Nail, Deodorant, Facial Skin Care, Fragrances, Hair Care, Hair Removal, HBL, Sun Care) Total US Panel; ; L52 (WE 03/25/2023), L52 YAG (WE 04/02/2022), 2022 Q1 (WE 04/02/2022), 2023 Q1 (WE 03/25/2023)

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Purchase Dynamics, L52 weeks

Channel	% HH Penetration	$ Purchase size	Purchase frequency
Omni	99.5 (+0.0 pts)	$16.16 (+9.4%)	45.6 (-1.9%)
In-Store	98.8 (-0.0 pts)	$13.07 (+8.6%)	35.2 (-4.6%)
Online	75.5 (+0.0 pts)	$26.32 (+5.2%)	14.0 (+6.5%)

Category (Omni)	% HH Penetration	Purchase size	Purchase Frequency
Beauty & Personal Care	99.5 (+0.0 pts)	$16.16 (+9.4%)	45.6 (-1.9%)
Bath & Shower	95.7 (-0.0 pts)	$8.13 (+12.9%)	11.8 (-10.6%)
Cosmetics & Nail	93.9 (+0.0 pts)	$13.31 (+8.3%)	13.9 (+1.8%)
Deodorant	86.4 (+0.0 pts)	$7.57 (+14.9%)	5.4 (+0.5%)
Facial Skin Care	76.8 (-0.0 pts)	$15.79 (+8.8%)	6.0 (-1.1%)
Fragrances	54.0 (+0.0 pts)	$31.99 (+12.4%)	3.4 (+2.0%)
Hair Care	96.5 (-0.0 pts)	$12.35 (+8.0%)	14.5 (-2.3%)
Hair Removal	80.6 (-0.0 pts)	$12.58 (+7.1%)	4.9 (-5.3%)
HBL	83.9 (-0.0 pts)	$12.12 (+9.4%)	5,7 (-1.5%)
Sun Care	53.3 (+0.0 pts)	$14.25 (+5.5%)	2.6 (+0.8%)

Key takeaway: Despite penetration being flat, Beauty & Personal Care continues to experience growth, with purchase size increasing, driven by strong In-Store performance. Overall, Purchase frequency continues to experience declines despite stong online growths, +6.5%. Online sales further develops as purchase size increases, despite buyer penetration remaining flat.

Similarly to the category, most Beauty & Personal Care categories consumption increased despite penetration remaining flat. Purchase Frequency declined across categories that may have less repeat purchasing behavior due to stock piling and inflation. Cosmetics & Nail and Fragrances continues to make notable gains, with significant growth in both purchase size and purchase frequency.

Source: NielsenIQ Omnishopper; Beauty & Personal Care (Bath & Shower, Cosmetics & Nail, Deodorant, Facial Skin Care, Fragrances, Hair Care, Hair Removal, HBL, Sun Care) Total US Panel; L52 (WE 03/25/2023), L52 YAG (WE 04/02/2022), 2022 Q1 (WE 04/02/2022), 2022 Q2 (WE 07/02/2022), 2022 Q3 (WE 10/01/2022), 2022 Q4 (WE 12/31/2022), 2023 Q1 (WE 03/25/2023)); % Penetration is by Household in Omnishopper

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