We deliver understanding and insights that make up the Full View

The Full View™

WHAT IS HAPPENING

What consumers do and buy

WHY IT'S HAPPENING

What consumers think and feel

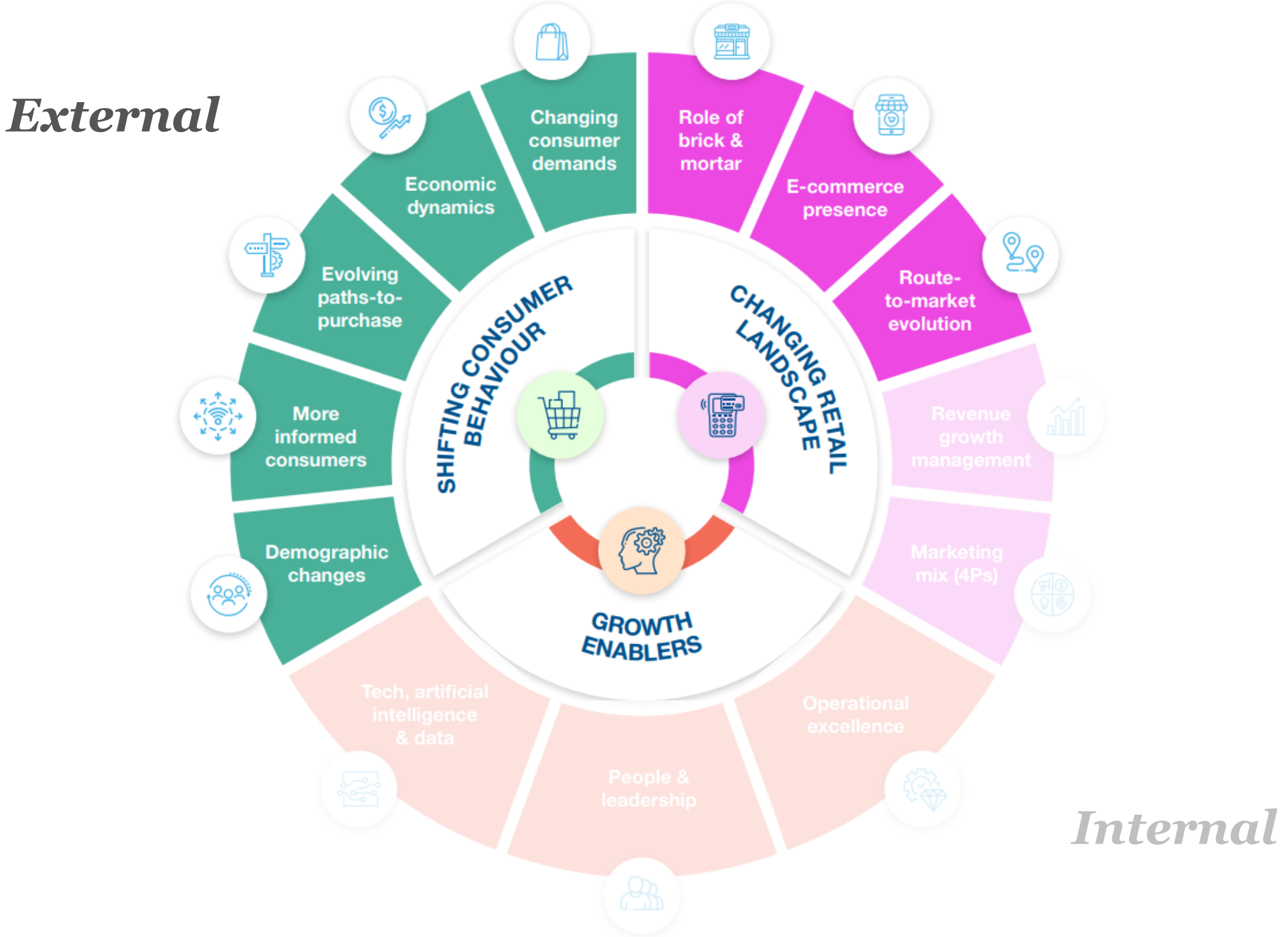
WHAT TO DO ABOUT IT

Capitalize on opportunities & mitigate risks

NIQ

The H&BA Roadmap to 2030

Which external factors will define the next five years?

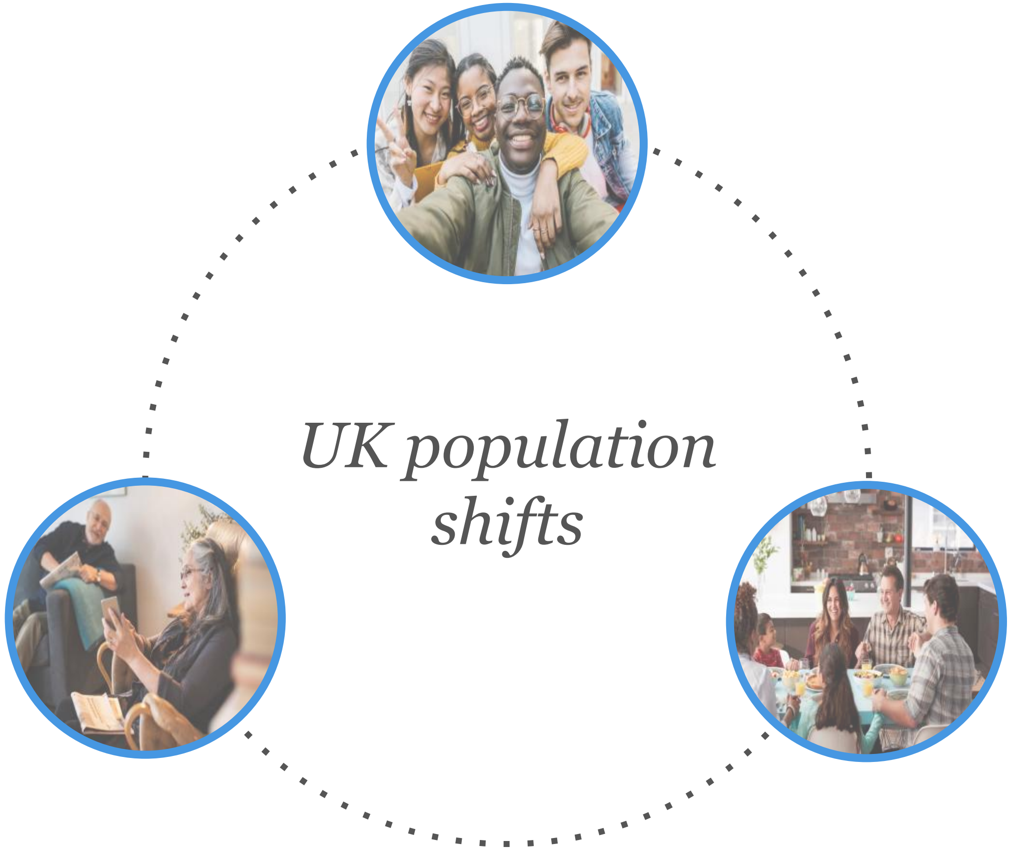


NIQ

The population will grow through ***net migration*** into the UK.

Consider intergenerational dynamics and how these could present opportunities to reach new demographics.

Key drivers of UK population changes over next five years



- **I. Demographic changes**
- II. More informed consumers
- III. Evolving paths-to-purchase
- IV. Economic dynamics
- V. Changing consumer demands

- I. Role of brick & mortar
- II. E-commerce presence
- III. Route-to-market evolution

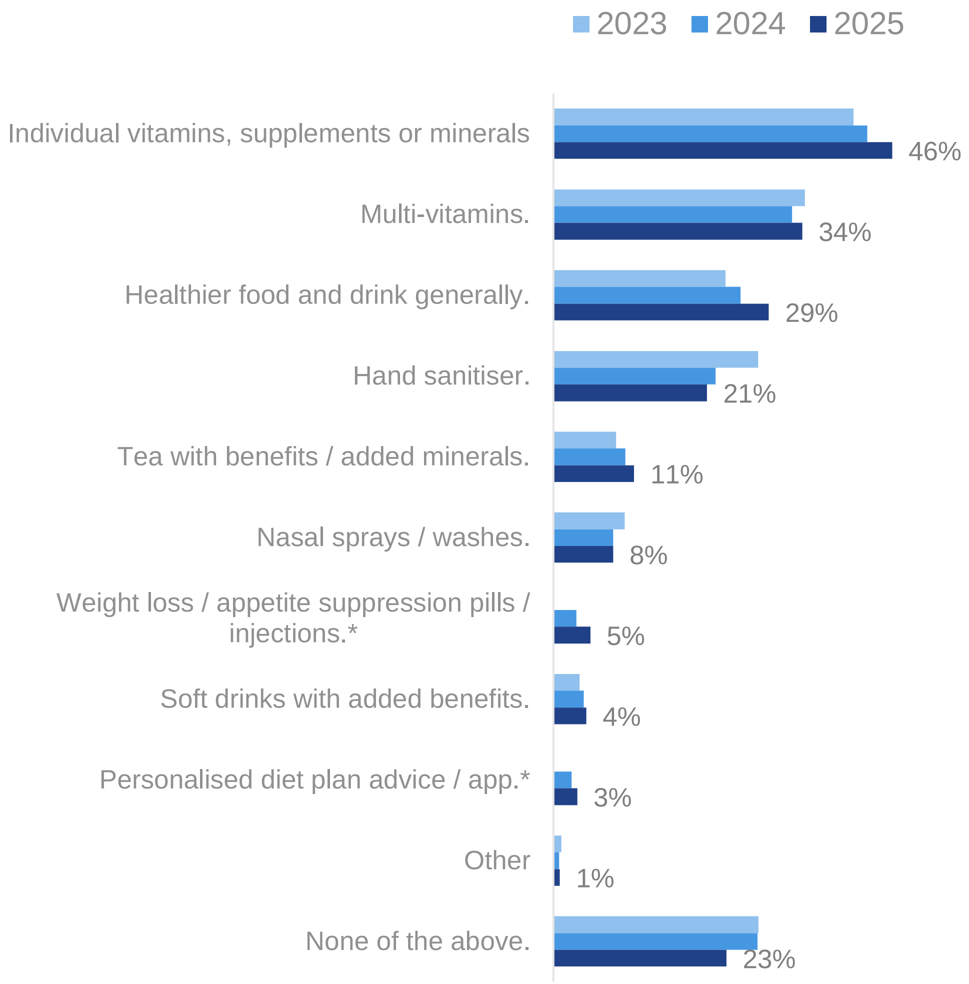
Source: Labour Force Survey (LFS), Office for National Statistics 2024

NIQ

Information access is driving ***purposeful healthcare***

Smart tech and social media are causing shoppers to be prescriptive and targeted in their health purchases.

Which of the following, if any, are you currently buying to help prevent future illnesses?



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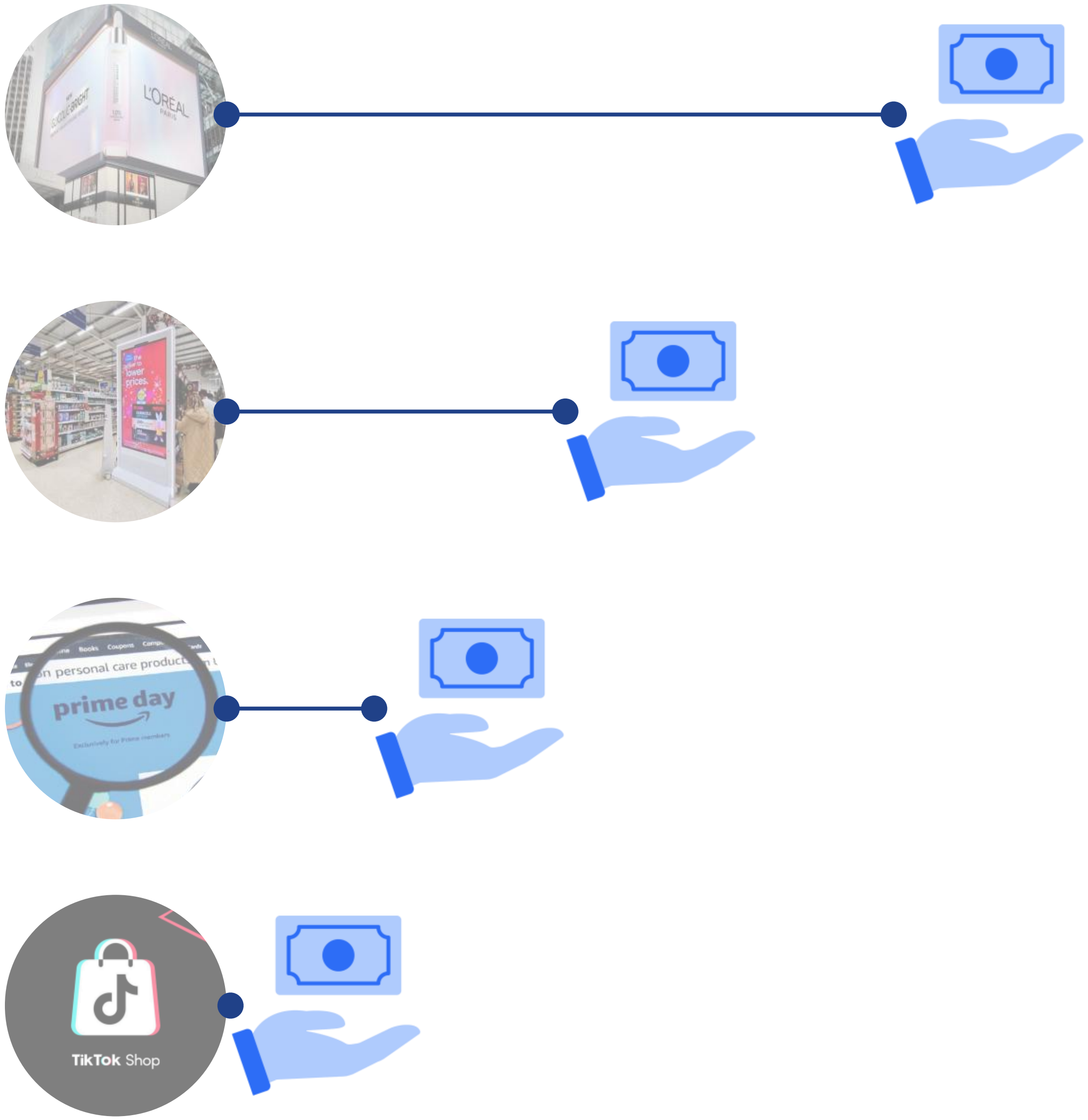
Source: NIQ Homescan Survey, March 2025, 7,626 respondents. Question: Which of the following, if any, are you currently buying to help prevent future illnesses?

NIQ

The distance from ***awareness*** to ***point of purchase*** is closing.

The barriers between mental and physical availability are disappearing. Are you ready for the next generation of P2P?

Distance between point of awareness and point of purchase

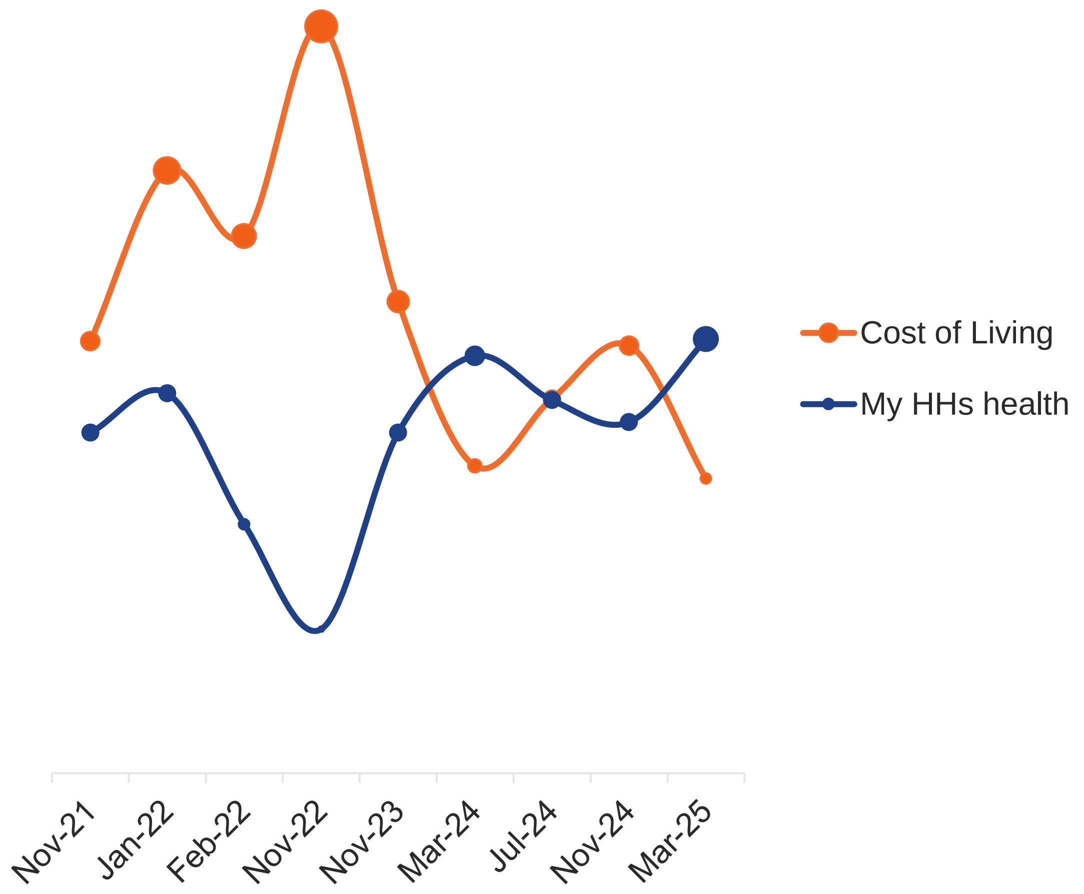


NIQ

Despite economic uncertainty, there are reasons to be ***optimistic***.

Household health is again the number one priority among shoppers.

Which of the following is the most important concern to you?



Source: NIQ Homescan Survey, March 2025, 7,626 respondents. Question: Which of the following, if any, is the most important concern to you at the moment?

NIQ

Volume recovery is at different stages depending on the category.

Shoppers are prioritising health & beauty, while personal care is struggling to keep pace.

Health Beauty & Personal Care Annual Category Sales

	Value Sales (£m)	% vs YA	Unit Sales (m)	% vs YA	Unit Price	% vs YA
TOTAL HBPC	**£13,578**	**6%**	**4,146**	**1%**	**£3.28**	**5%**
HEALTH	**£4,286**	**6%**	**1,239**	**1%**	**£3.46**	**4%**
OTHER OTC	£1,803	5%	419	1%	£4.31	4%
PAIN RELIEF	£734	4%	472	1%	£1.55	3%
RESPIRATORY	£726	7%	163	2%	£4.46	5%
VITAMINS	£660	7%	116	3%	£5.67	4%
STOMACH	£364	7%	69	2%	£5.28	5%
BEAUTY	**£4,296**	**7%**	**914**	**1%**	**£4.70**	**5%**
HAIR CARE	£1,564	7%	394	0%	£3.97	6%
COSMETICS	£1,001	6%	158	1%	£6.32	4%
OTHER SKINCARE	£869	8%	172	5%	£5.04	3%
FACIAL SKINCARE	£860	8%	189	0%	£4.54	7%
PERSONAL CARE	**£4,997**	**4%**	**1,993**	**0%**	**£2.51**	**5%**
ORAL CARE	£1,385	4%	468	1%	£2.96	3%
BABY CARE	£949	0%	351	-4%	£2.71	4%
WASHING & BATHING	£801	6%	467	-1%	£1.72	7%
DEODORANTS	£715	9%	308	1%	£2.32	7%
SHAVING	£418	1%	91	-1%	£4.60	2%
OTHER PERS CARE	£413	10%	125	4%	£3.31	6%
FEMININE HYGIENE	£315	2%	184	0%	£1.71	2%

Source: RMS Scantrack, Total GB, 52 w/e 22 March 2025

NIQ

Boots was the big share winner this year, but uncertainty still looms for the retailer.

Brick & Mortar will play an important role in the industry's future, but specific retailers are at risk of losing their position.

Health Beauty & Personal Care Retailer Shares

	HBPC	vs YA	Health	vs YA	Beauty	vs YA	PC	vs YA
Tesco	22%	0.6%	23%	1.0%	14%	0.3%	23%	0.5%
Sainsburys	12%	0.1%	12%	0.3%	9%	-0.3%	13%	0.2%
Boots	12%	1.4%	13%	0.5%	19%	2.8%	8%	1.5%
Asda	10%	-1.0%	8%	-0.6%	7%	-0.9%	13%	-1.2%
Superdrug	7%	0.0%	4%	-0.1%	21%	-0.5%	5%	0.1%
Morrisons	6%	-0.1%	6%	0.1%	3%	-0.3%	7%	-0.1%
Home Bargains	5%	0.1%	5%	-0.1%	3%	0.1%	5%	0.2%
Aldi	4%	-0.2%	2%	-0.2%	3%	-0.1%	6%	-0.2%
Lidl	3%	0.1%	2%	0.0%	2%	0.3%	3%	0.2%
Savers	2%	0.1%	3%	0.1%	2%	0.0%	2%	0.1%
Co-Op	2%	0.0%	3%	0.0%	1%	-0.1%	2%	0.1%
Waitrose	2%	-0.1%	2%	0.0%	1%	-0.2%	2%	-0.1%
Poundland	2%	-0.1%	1%	-0.1%	2%	0.1%	2%	-0.2%
B&M	1%	0.0%	1%	0.1%	1%	-0.1%	2%	0.0%
Holland & Barrett	1%	0.1%	2%	0.2%	0%	0.1%	0%	0.0%

Source: NIQ Panel on Demand, Total GB, Total HBPC, Value Share of Total Outlets, 52 w/e 22/03/2025

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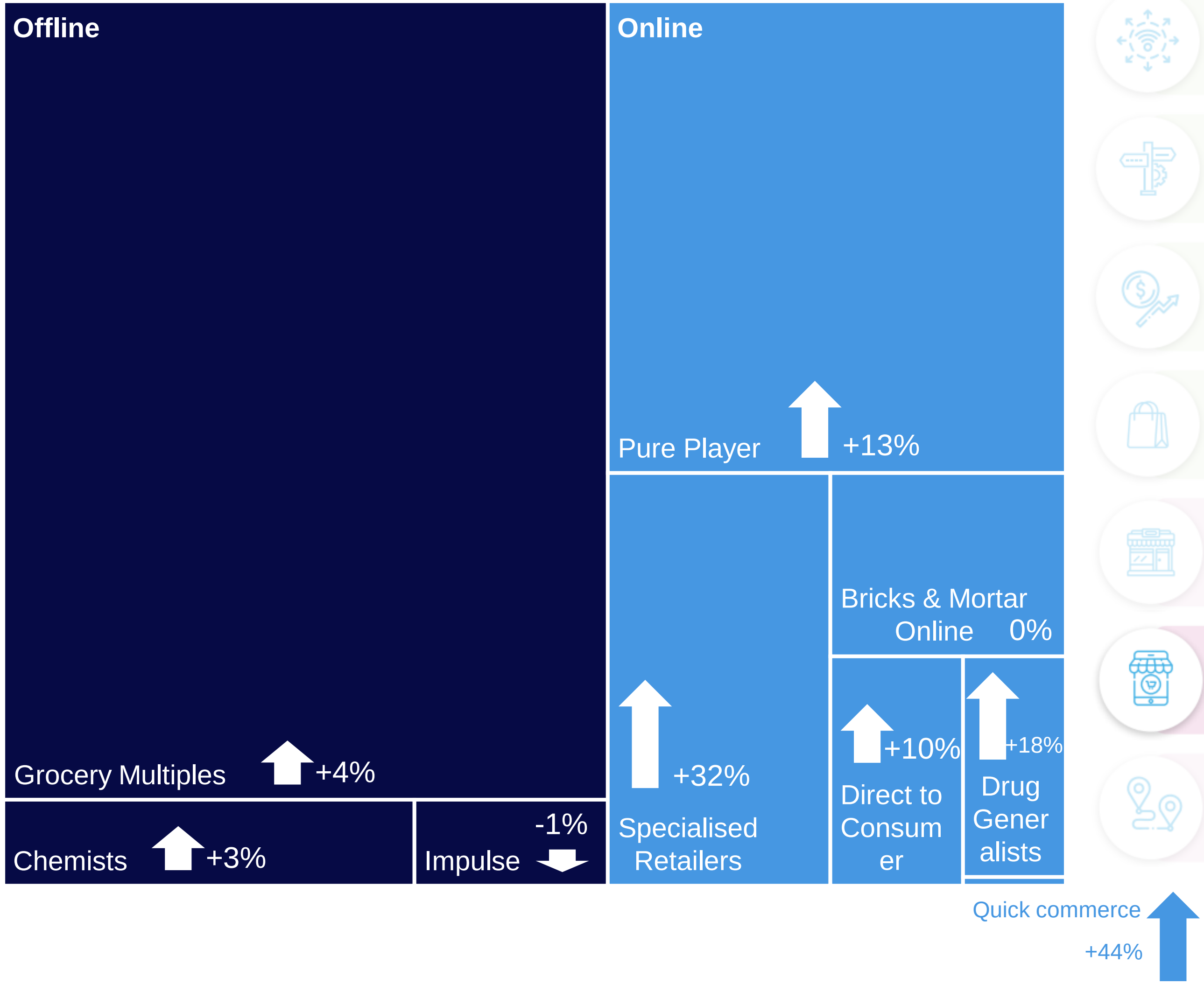
NIQ

E-commerce accounts for 49% of HBPC.

Online will likely become the majority of HBPC with in the coming months, based on current channel growth rates.

Omnichannel Value Share of Health Beauty & Personal Care



Source: NIQ Omnisales, Total HBPC, Value Share, 52 w/e 22nd March 2025

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NIQ

Path to Purchase vs Route to Market

More paths to purchase have ***fragmented the route to market***

100% omnichannel distribution is becoming harder to achieve, which creates a direct threat to shopper recruitment.

Paths to Purchase

Supermarket
High Street Chemist
Pharmacy
Impulse
Health Specialist
Discounter
Bargain Store
Amazon
Brick & Mortar Online
D2C
Social Commerce
Marketplace
Rapid Delivery
Specialist Pureplayers

Fragmented Route to Market

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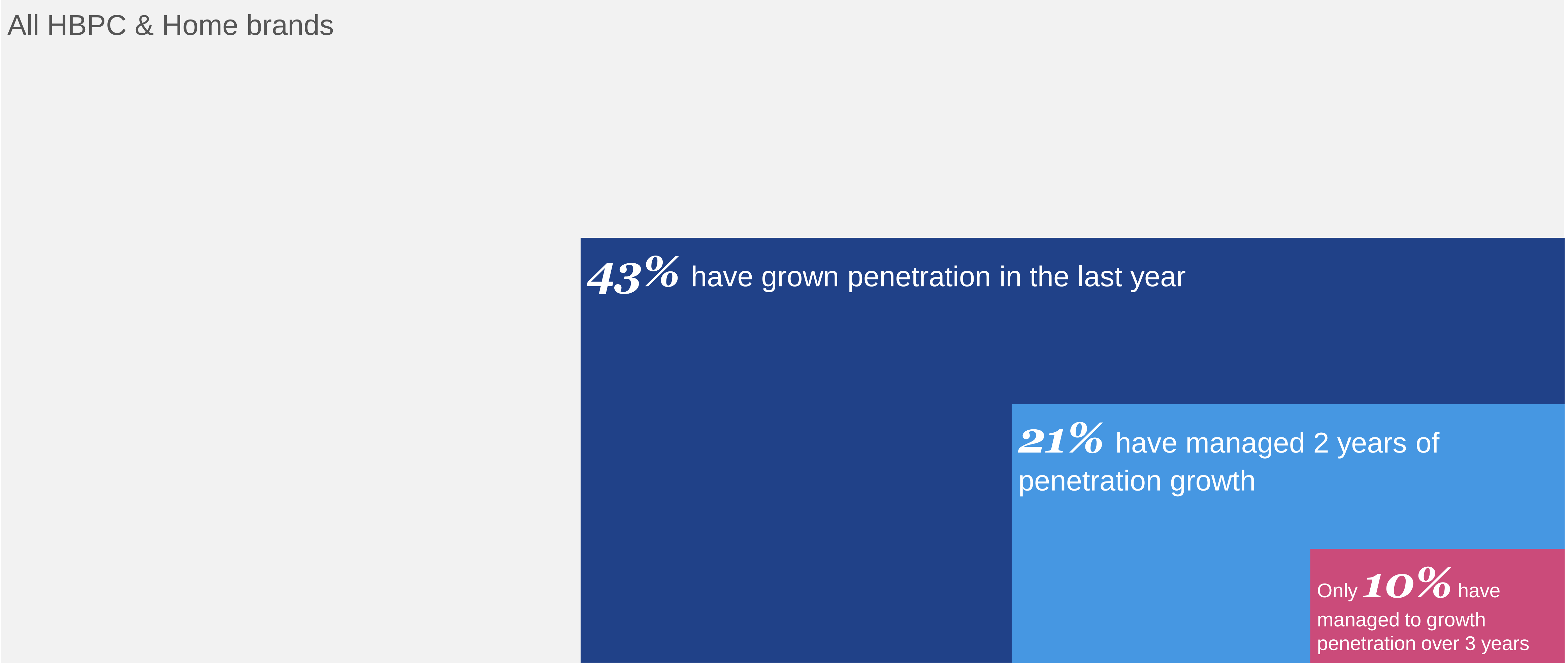
NIQ

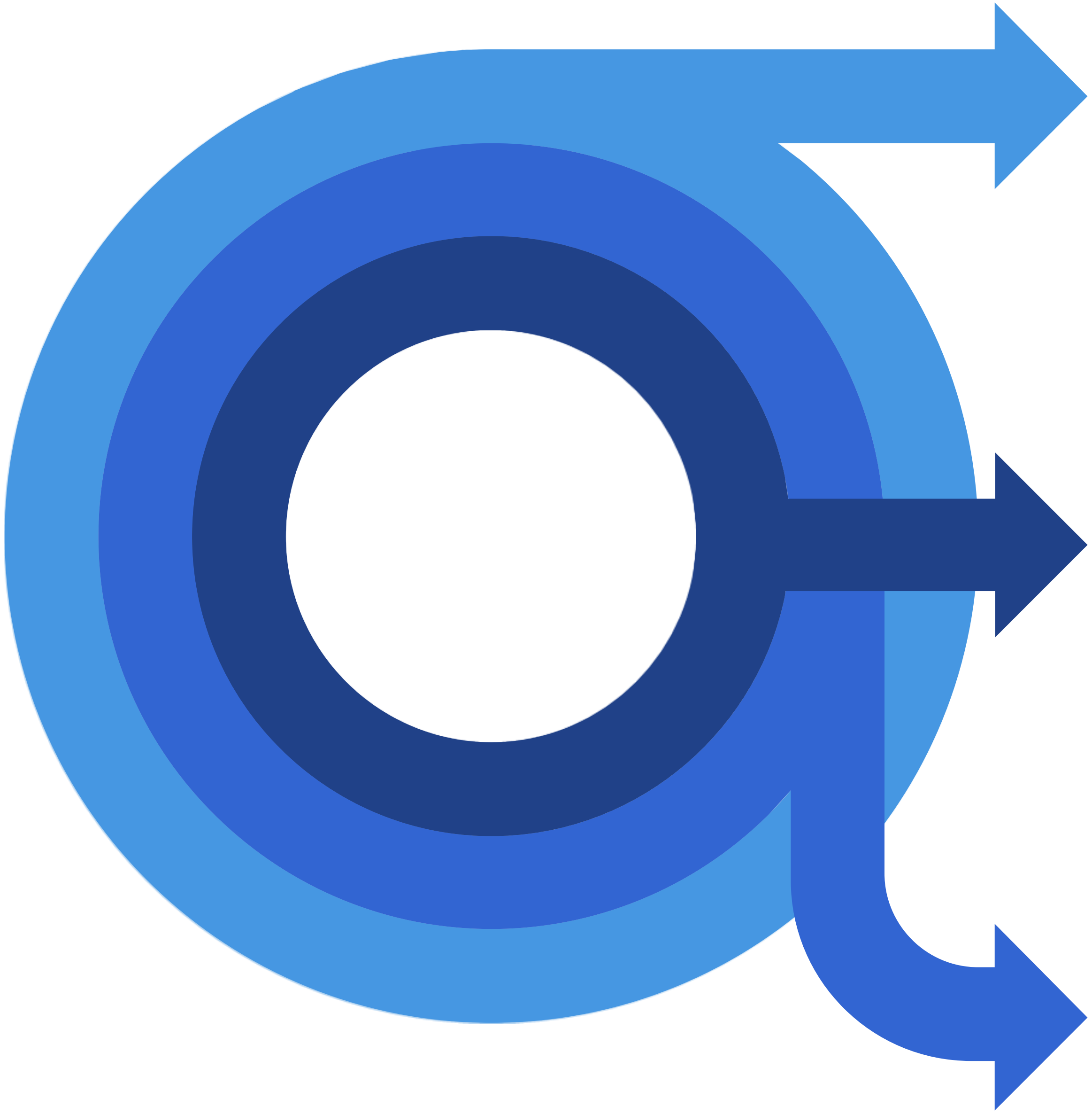
How hard is it to win sustainable penetration growth?



Source: NIQ Homescan, Total Outlets MAT WE 22.03.25

Dial Up, Differentiate, Disrupt reminder

Driving
sustainable volume

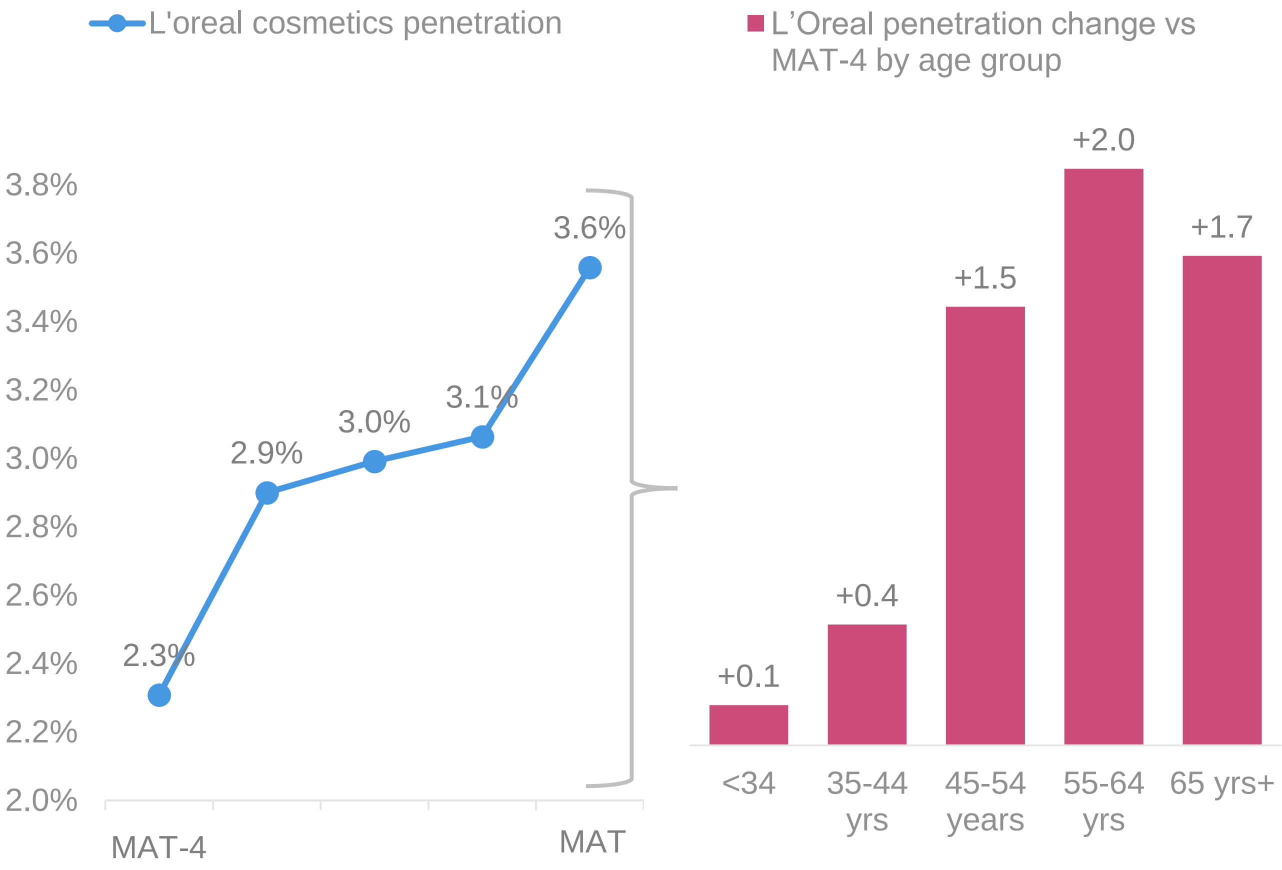


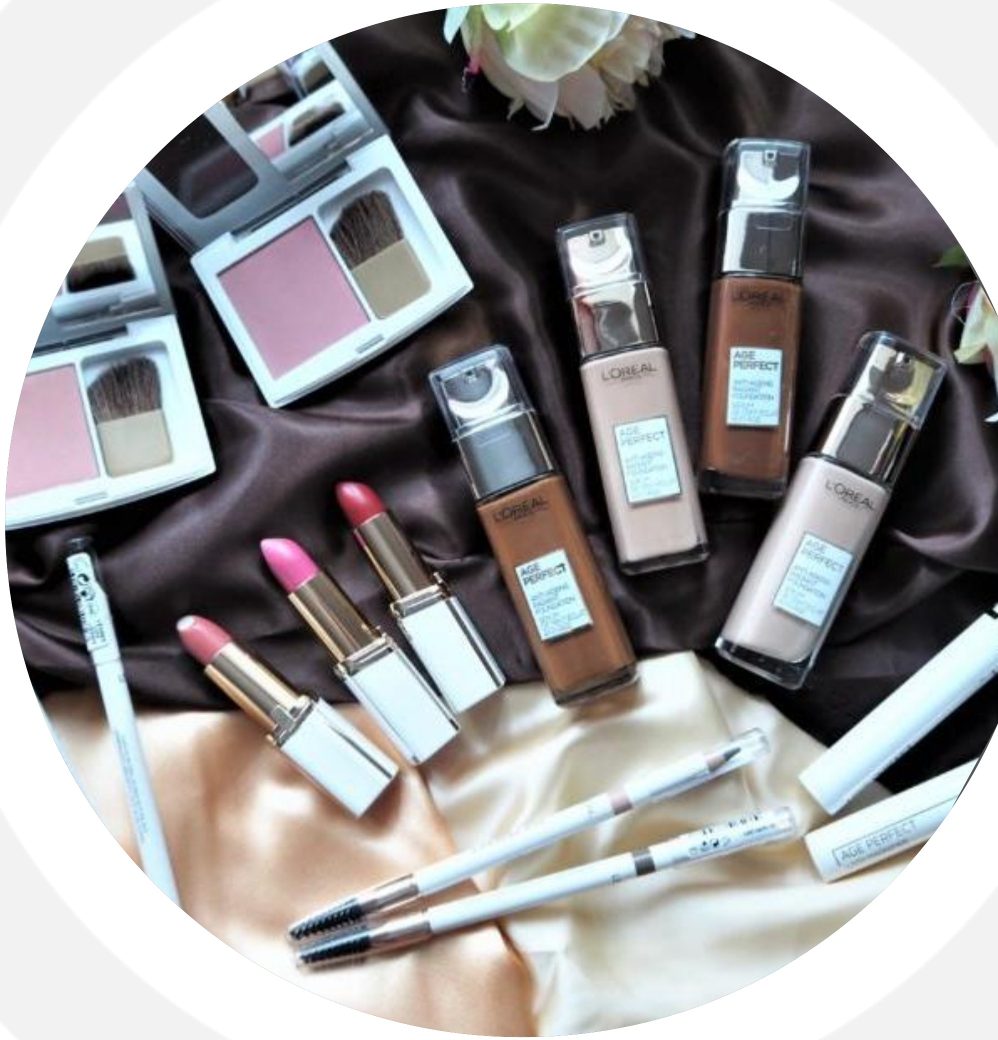
Disrupt
Be first with the best ideas

Dial Up
Get the basics right and live by them

Differentiate
Stand out on a crowded shelf

L’Oréal’s consistent growth in cosmetics is no accident; it reflects a deliberate strategy of *de-averaging* and inclusive targeting.

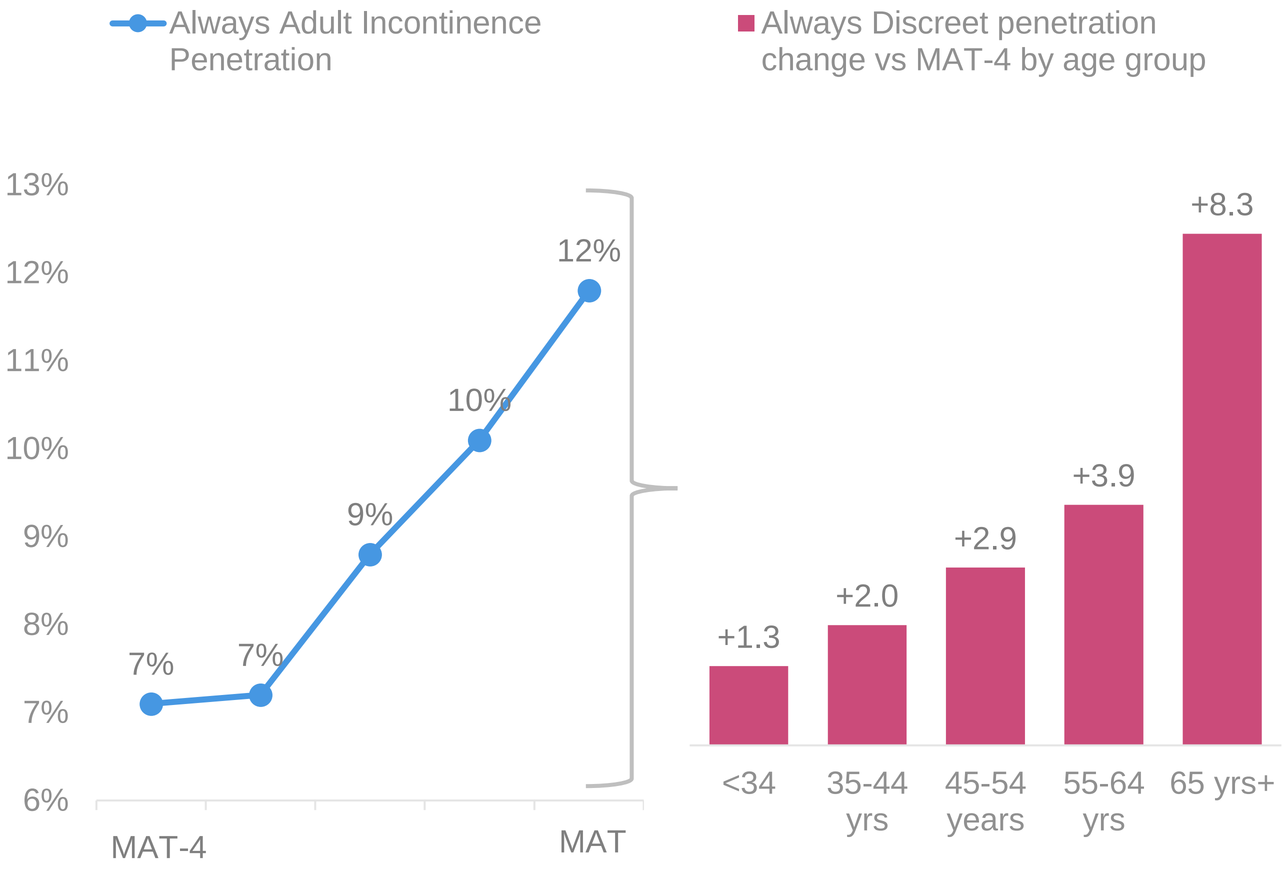




Dial Up

Source: NIQ Homescan, Total Outlets MAT WE 22.03.25

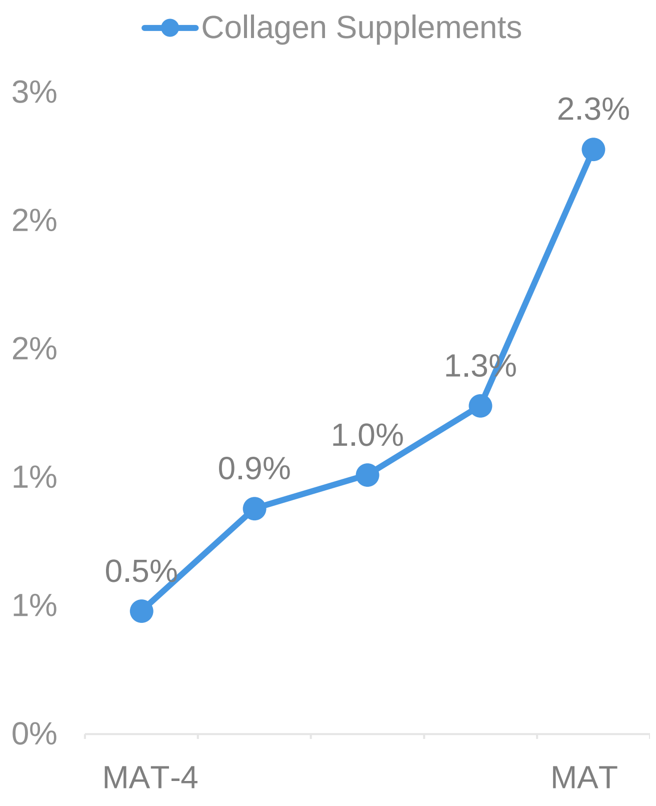
Always is driving growth by meeting real shopper needs.



Differentiate

Source: NIQ Homescan, Total Outlets MAT WE 22.03.25

Collagen is fuelling growth in vitamins, appealing to both beauty-focused consumers and those prioritising everyday health.



Growth is not niche, as collagen sees increased buyers in ***all age groups & Social grades***

Key brands driving growth

Disrupt

Source: NIQ Homescan, Total Outlets MAT WE 22.03.25

H&BA Strategic Roadmap

5 things to take away

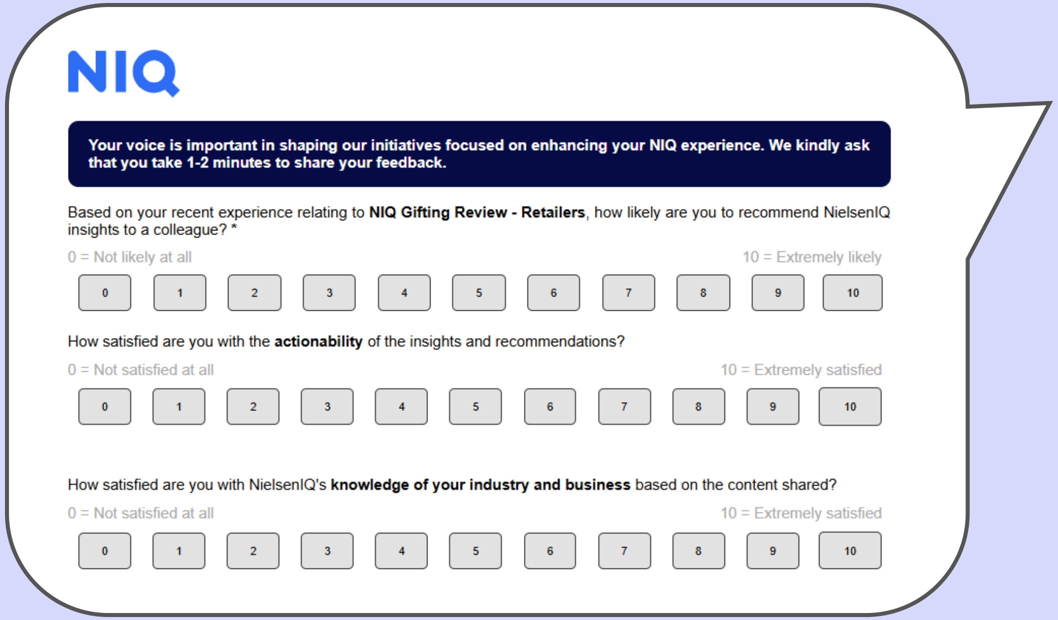
1. *Prioritise* ***shopper recruitment***
2. *Assess size of* ***channel blind spots***
3. *Modernise* ***shorter path to purchase***
4. *Audit* ***price & promo strategy***
5. *Be optimistic,* ***be bold***

NIQ

Give us a *shout-out* if you like our work!

New format but still easy

*Won't take you more than **2 minutes**!*


NIQ

Your voice is important in shaping our initiatives focused on enhancing your NIQ experience. We kindly ask that you take 1-2 minutes to share your feedback.

Based on your recent experience relating to **NIQ Gifting Review - Retailers**, how likely are you to recommend NielsenIQ insights to a colleague? *

0 = Not likely at all — 10 = Extremely likely

0 1 2 3 4 5 6 7 8 9 10

How satisfied are you with the **actionability** of the insights and recommendations?

0 = Not satisfied at all — 10 = Extremely satisfied

0 1 2 3 4 5 6 7 8 9 10

How satisfied are you with NielsenIQ's **knowledge of your industry and business** based on the content shared?

0 = Not satisfied at all — 10 = Extremely satisfied

0 1 2 3 4 5 6 7 8 9 10

Or click the [link]

P.S. How the score is calculated:

0 1 2 3 4 5 6	7 8	9 10
Not Satisfied	**Neutral**	**Satisfied**

Easy tip:

If you like it, give us a 9 or 10!