



H&BA
The Health & Beauty Association

Accelerating Sustainable Industry **Growth** of Health, Beauty & Personal Care

Thursday 6th November 2025



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Agenda

- Consumer Climate
- Health & Beauty Spotlight
- Digital Landscape
- Shifting Demographics
- Summary of Opportunities
- Q&A

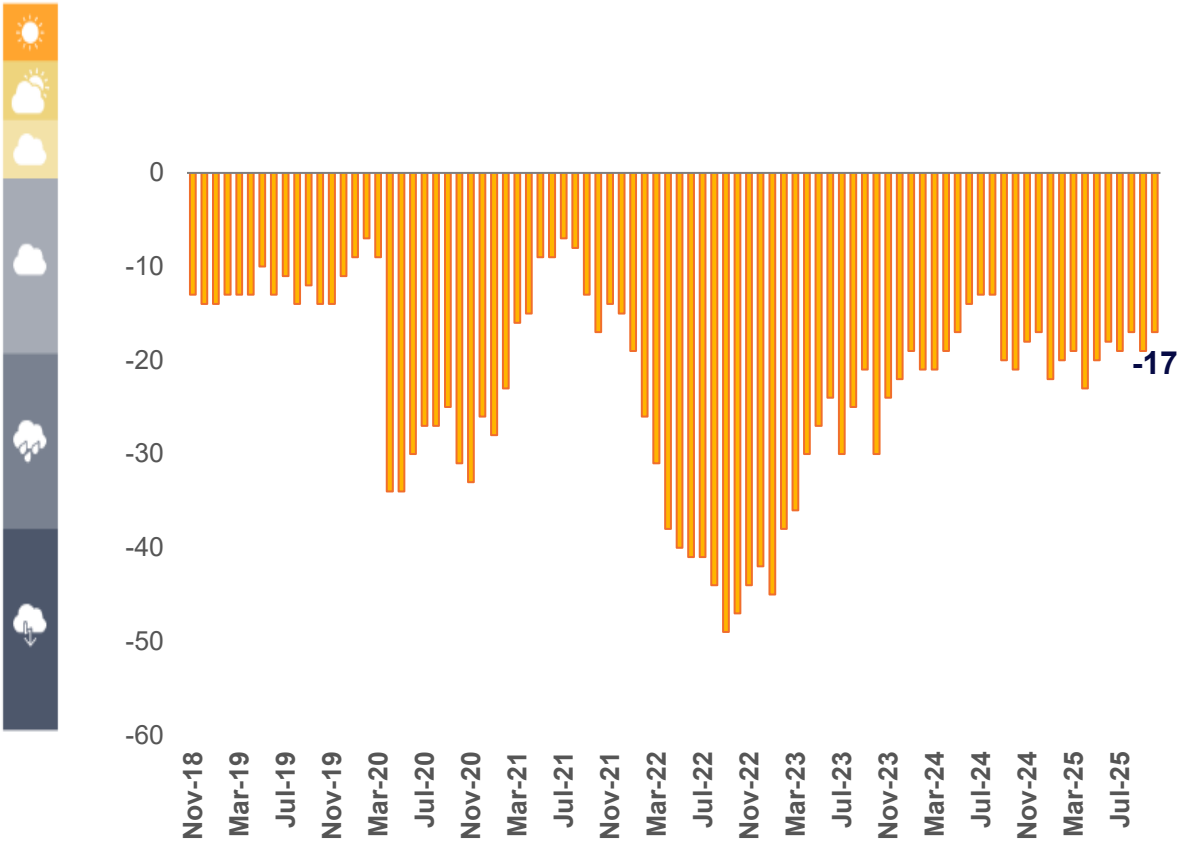


Consumer Climate

Consumer confidence recovery has stalled.

Over the past seven years, confidence was only lower during the pandemic and cost of living crisis.

GfK Consumer Confidence



	Personal Financial Situation	-7 (-3)
	Personal Financial Situation	+4 (-1)
	General Economic Situation	-45 (-3)
	General Economic Situation	-32 (-2)
	Major Purchase Index	-16 (-3)
	Savings Index	+22 (-8)

← Last 12 months
→ Next 12 months

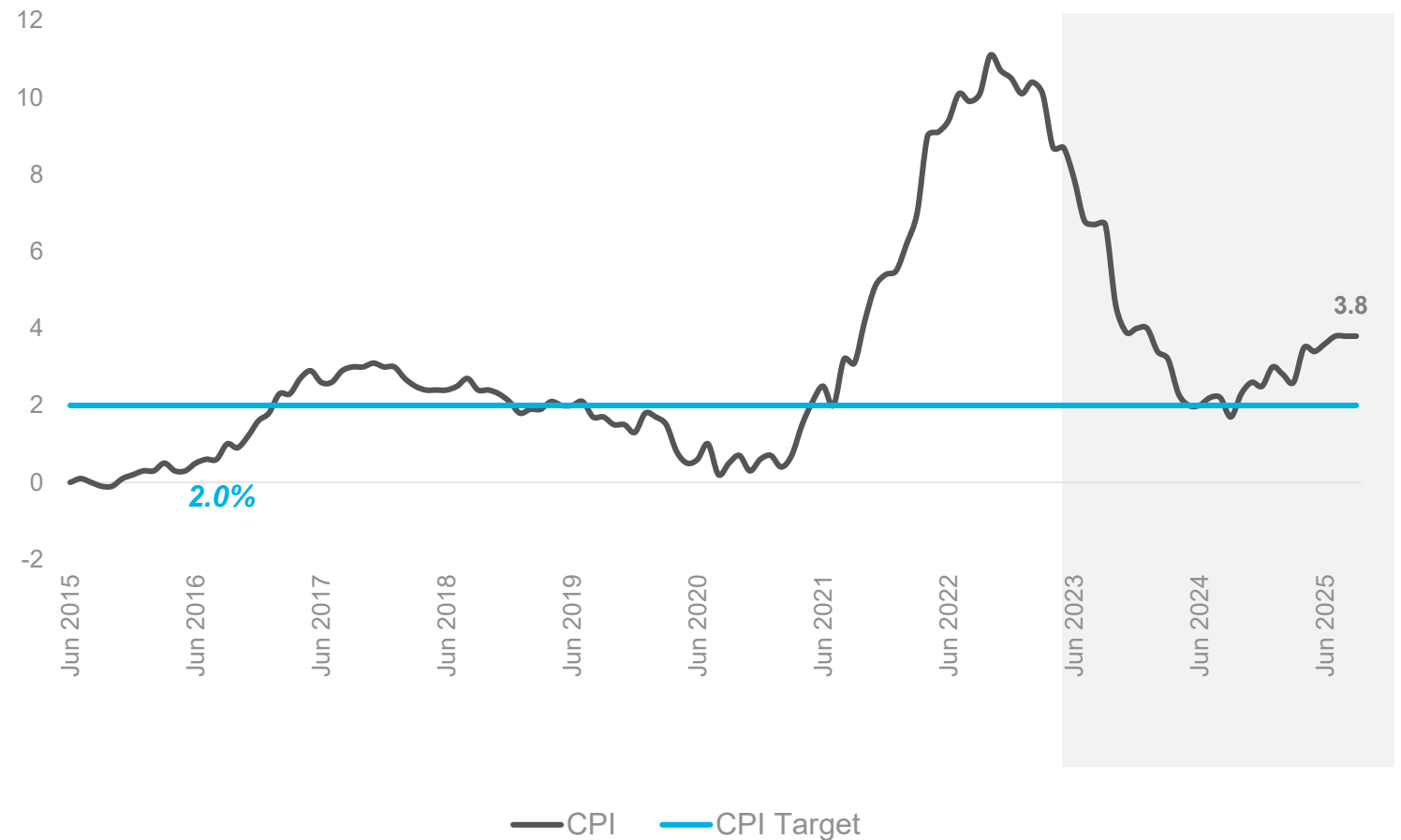
How has the financial situation of your household changed over the last 12 months/next 12 months? How do you think the general economic situation in this country has changed over the past 12 months/next 12 months?
In view of the general economic situation, do you think now is the right time for people to make major purchases such as furniture or electrical goods? In view of the general economic situation do you think now is a good time to save (not included in overall Index)
The figures in the brackets are how the score has moved compared with the previous month. So, in the case of 'General Economic Situation over last 12 months' this was -45 in September, decreasing by 3 points from -42 in August.

Source: GfK Consumer Confidence Barometer powered by NIM

Prices are rising again in the UK.

Rising housing & household services costs are siphoning off income before consumers can spend on health & beauty.

UK CPI: June 2015 to June 2025

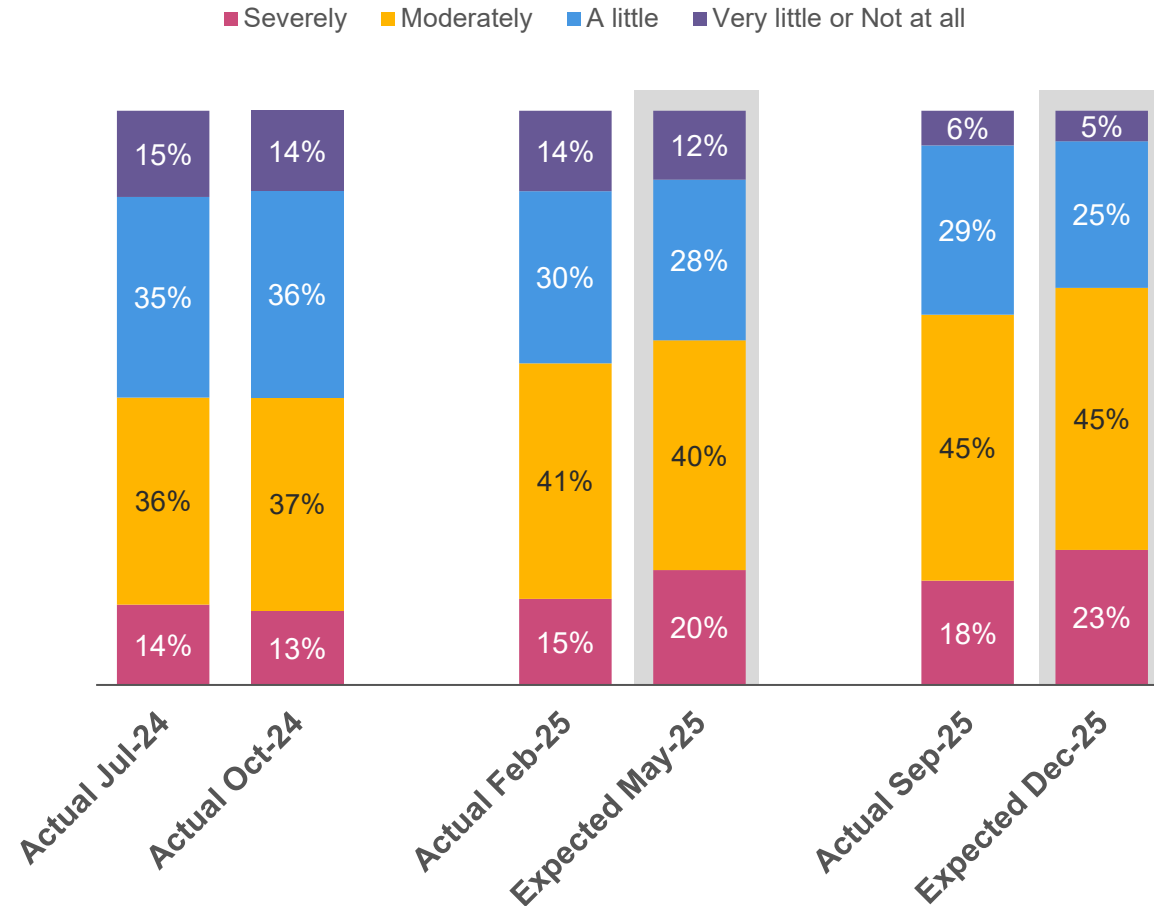


Source: <https://www.ons.gov.uk/economy/inflationandpriceindices/bulletins/consumerpriceinflation/june2025#latest-movements-in-cpi-inflation>

Shoppers are feeling the *cost-of-living* impact again

Almost 1 in 4 expect to be severely affected by the end of the year.

How much is the cost-of-living crisis impacting you?

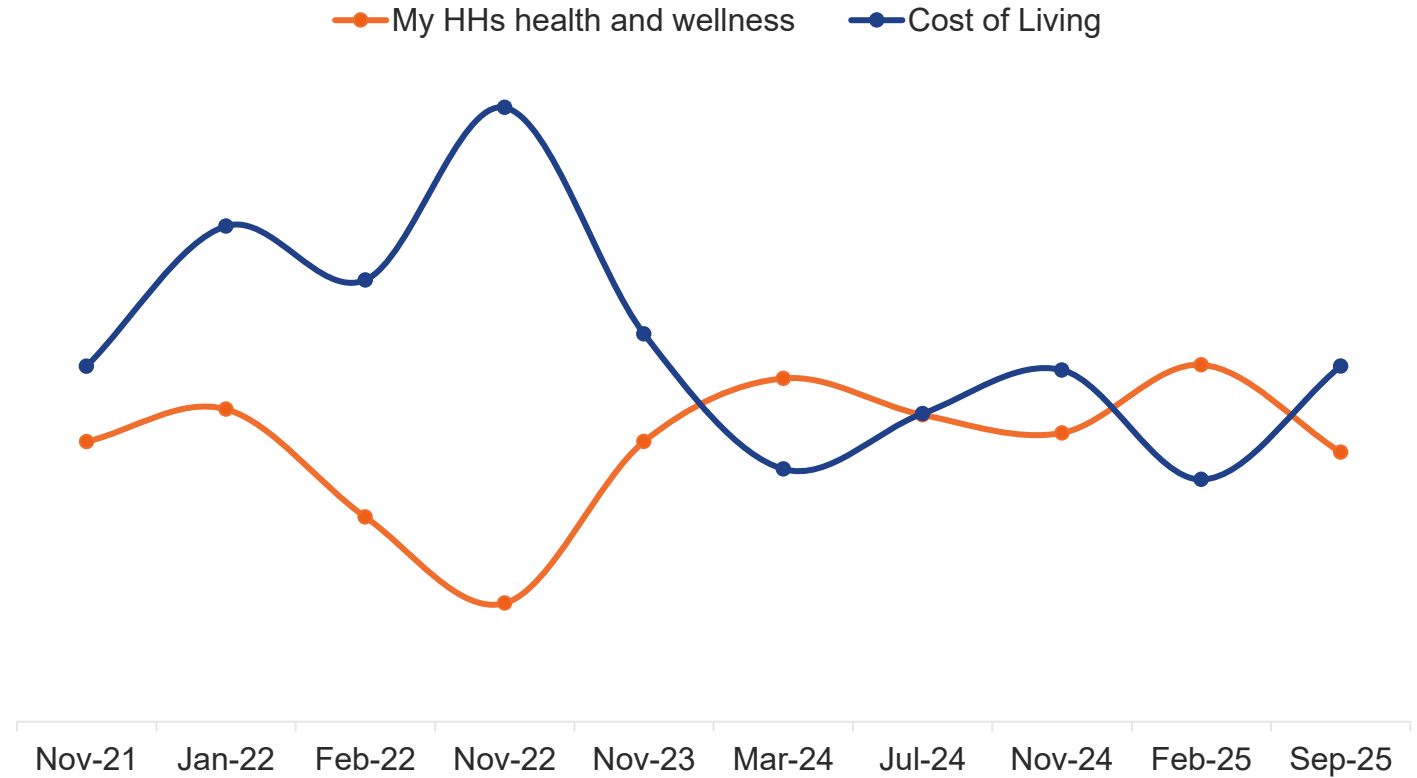


Source: NIQ Homescan Survey Sep 2025

Health & wellness is the #2 priority to shoppers.

“My household’s health & wellness” has been grappling with the rising cost of living as shoppers’ #1 concern since 2020.

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

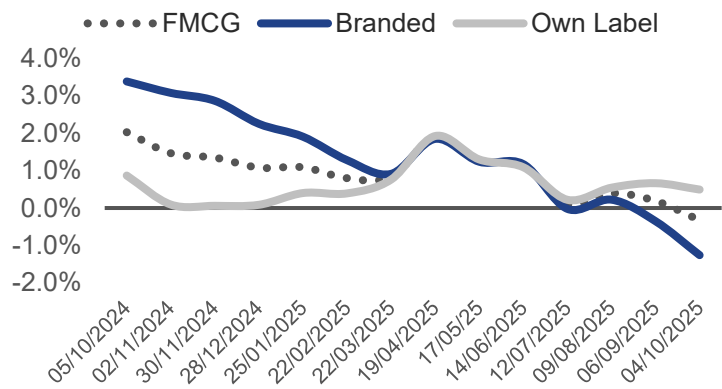


Source: NIQ Homescan Survey Sep 2025

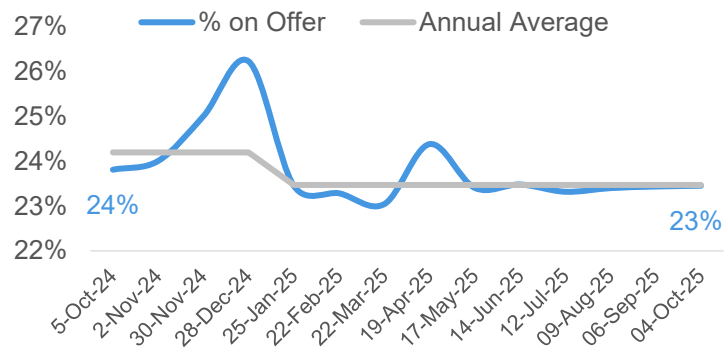
Trends across FMCG



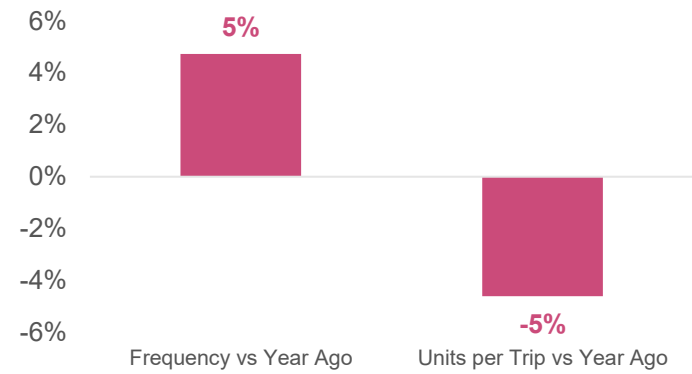
Brands losing to Private Label



Falling promotional dependency



Smaller, more frequent trips



Source: NIQ Homescan Total GB, Total FMCG., 52 w/e 04/10/2025



Health & Beauty Spotlight

HBPC value has grown 6% on last year.

Price is the leading factor of growth, but positive unit sales are encouraging for underlying industry health.

Health, Beauty & Personal Care

£13.87bn value
+6%

4.16bn units
+1%

£3.34 price
+4%



Health
£4.34bn
+3%



Beauty
£4.43bn
+6%



Personal Care
£5.11bn
+4%

Source: NIQ Scantrack, Total GB, 52 w/e 04/10/2025

Stomach remedies are a stand-out performer in Health

£4.34bn value
+3%

1.23bn units
-1%

£3.53 price
+4%



Healthcare Value Sales and Change vs Year Ago



		Value vs Year Ago	Units vs Year Ago	Price vs Year Ago
OTC	£1,836m	+4%	-1%	+5%
PAIN RELIEF	£738m	+2%	+0%	+2%
RESPIRATORY	£708m	-1%	-4%	+3%
VITAMINS	£677m	+5%	+3%	+3%
STOMACH	£380m	+8%	+4%	+4%

Source: NIQ Scantrack, Total GB, 52 w/e 04/10/2025

Weight loss drugs are impacting total spend.

GLP-1 users are spending less on groceries. The rise in popularity could cause challenges for retailers.

9%

HHs with a current
GLP-1 user



-5%

Reduction in total
FMCG spending after
6 months*



1/3 of categories saw **reductions** greater than **17%**



1/3 categories saw **gains** of **15%** or more

Source: NIQ Homescan Survey, Sep 2025



Beauty is typically resilience in difficult times

£4.43bn value
+6%

922m units
+2%

£4.80 price
+4%



Beauty Value Sales and Change vs Year Ago

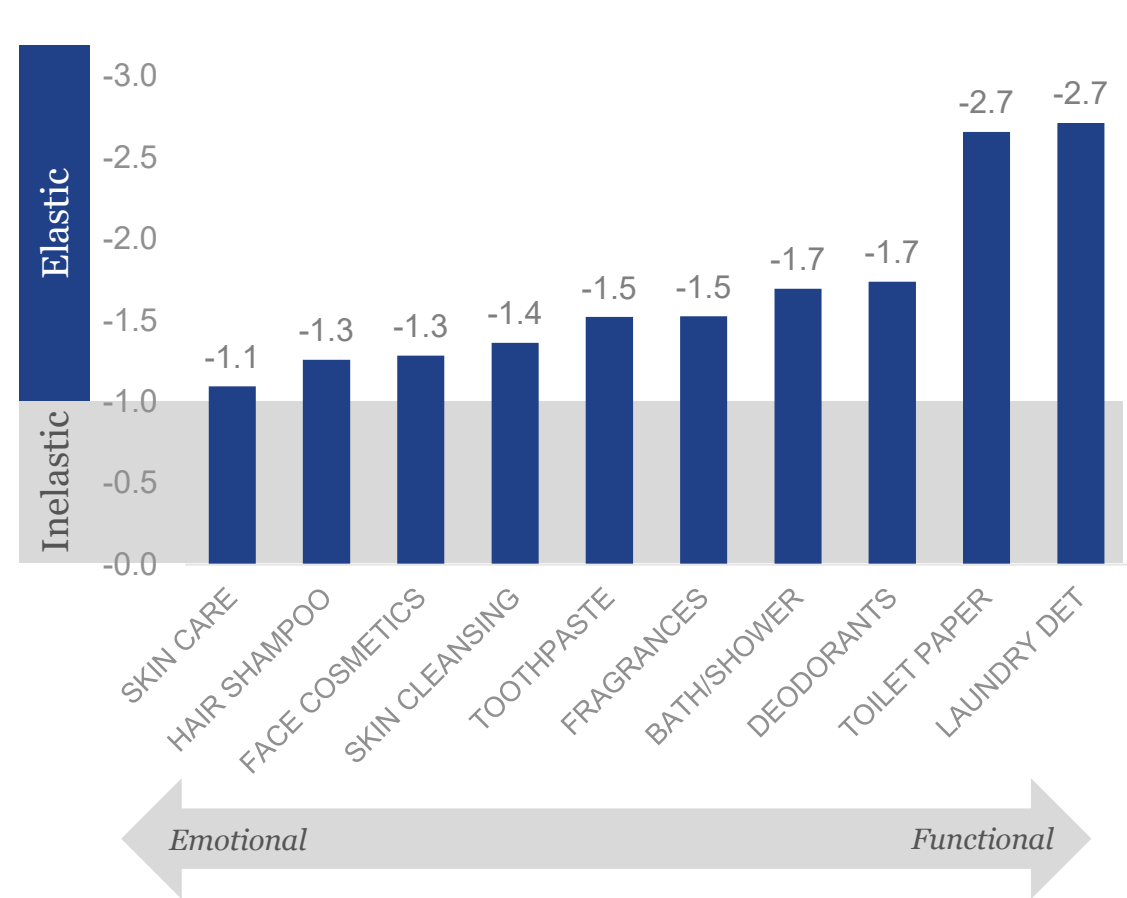


Source: NIQ Scantrack, Total GB, 52 w/e 04/10/2025

Connecting with shoppers builds resilience.

Use branding to tell stories and connect with shoppers on an emotional level. Functional products tend to struggle more when trying to command higher prices.

Regular Price Elasticity Benchmarks Q3 2025: Top 10 Categories



Source: NIQ Everyday Analytics Benchmarks Q3 2025



Regular Price Elasticity Benchmarks Q3 2025: Sectors



Deodorants are the star performer in *Personal Care*

£5.11bn value
+4%

2.00bn units
0%

£2.55 price
+4%



Personal Care Value Sales and Change vs Year Ago

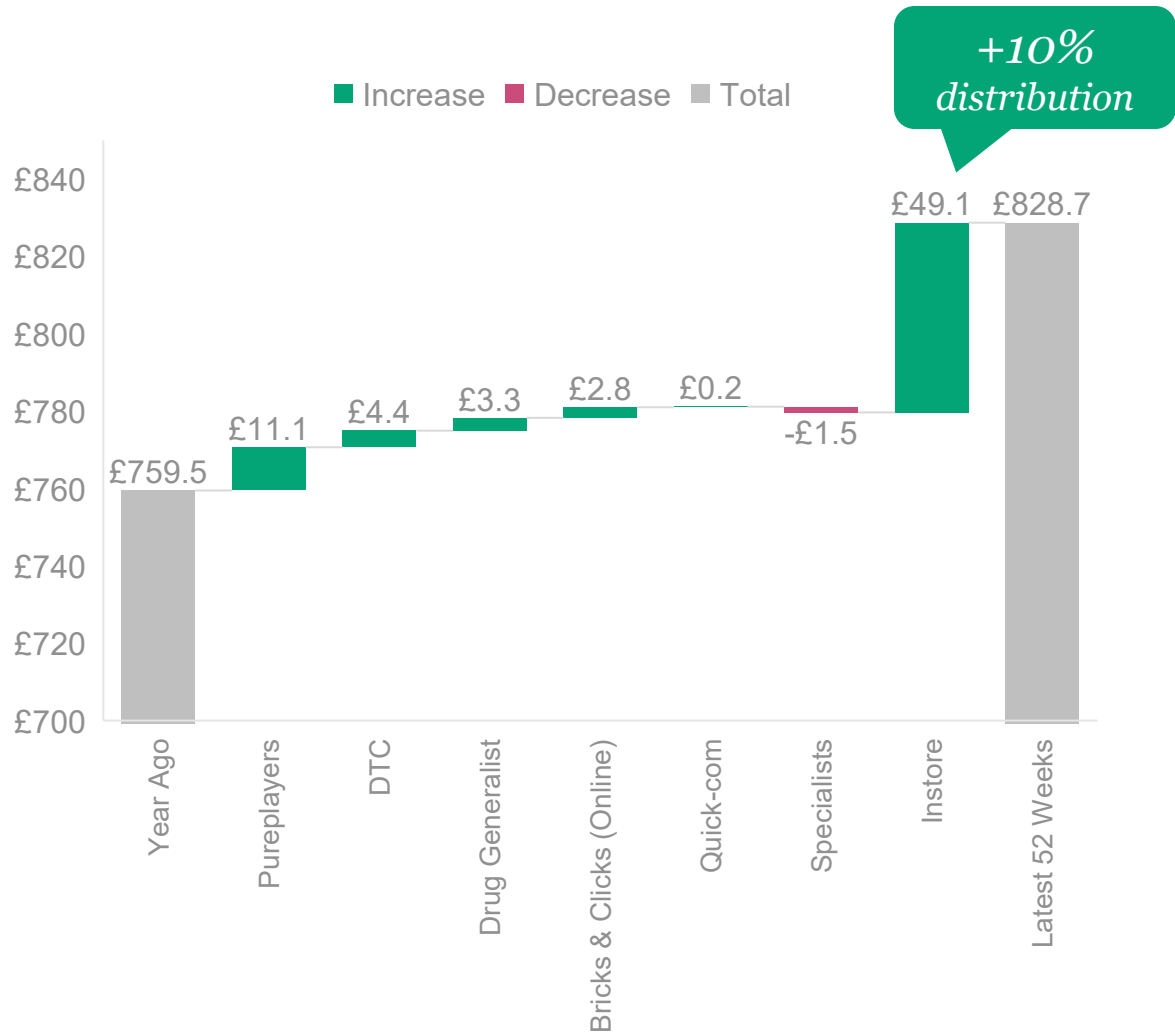


		Value vs Year Ago	Units vs Year Ago	Price vs Year Ago
ORAL CARE	£1,417m	+5%	+1%	+4%
BABY CARE	£955m	+1%	-2%	+3%
WASHING & BATHING	£830m	+7%	-0%	+7%
DEODORANTS	£753m	+9%	+3%	+6%
SHAVING	£421m	+1%	-0%	+1%
OTHER PERSONAL CARE	£412m	+6%	+4%	+2%
FEMININE HYGIENE	£317m	+2%	-0%	+2%

Source: NIQ Scantrack, Total GB, 52 w/e 04/10/2025

Deodorants are winning on all fronts.

Retailers are expanding their ranges as the category benefits from premiumisation, innovation and new routes to market.



Brick & Mortar trends shaping physical retail



Independent pharmacies return

Independent store numbers have grown 3% YoY, while multiples have fallen 3%. The Lloyds closure and Boots consolidation led to many pharmacies taking over the divested branches.

Boots continue to make strides in premium beauty and digital commerce, despite being taken over by TikTok as beauty's #2 e-retailer.



Value retail shifting focus to Beauty

Low-price channels including value retail, discounters, wholesalers and TikTok are winning share of trade, while traditional channels such as grocers losing out.

The downside for value retail is a loss of share in toiletries, as shoppers look to premiumise on the high street or buy even cheaper on Amazon.



Asda challenges mounting

Asda continues to lose share to supermarkets and discounters. Range resets, "Asda Price" restoration and convenience acceleration are being announced by the retailer, but success will be determined by whether they can recoup lost shoppers.

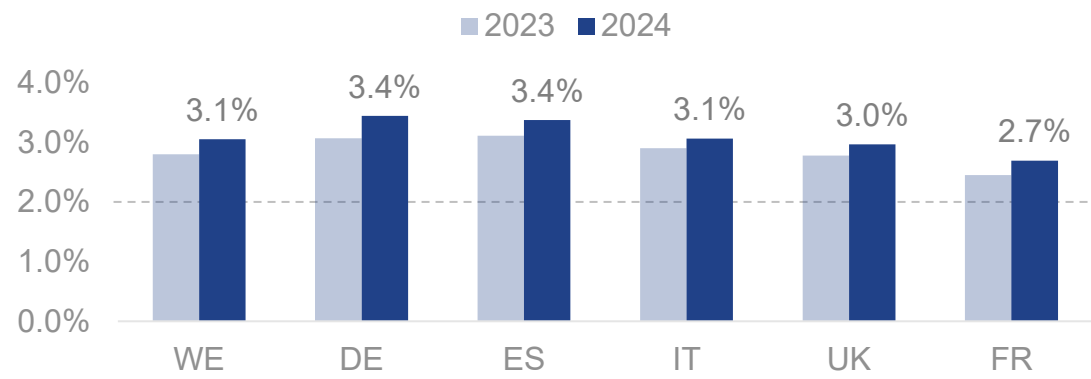


Digital Landscape

Black Friday is a must-win for Beauty brands.

The event’s contribution to annual sales is growing.

(%) Black Friday week contribution to annual sales | FMCG

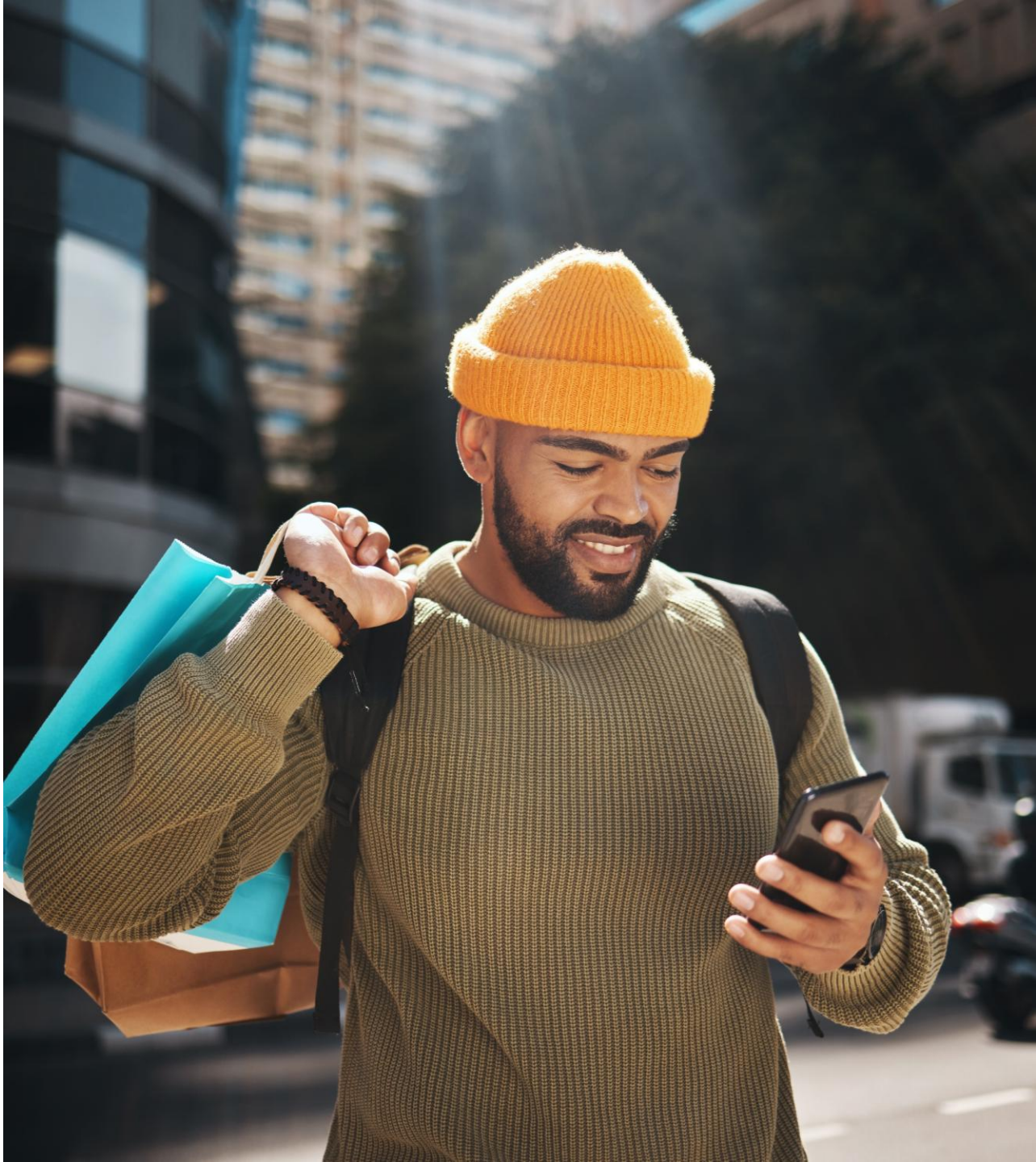


Top 5 value uplifts in Black Friday 2024

Uplift: Black Friday week sales vs 2024 weekly avg

Fragrances	360
Air care	286
Cosmetics	274
Electrical supplies	239
Hair care	227

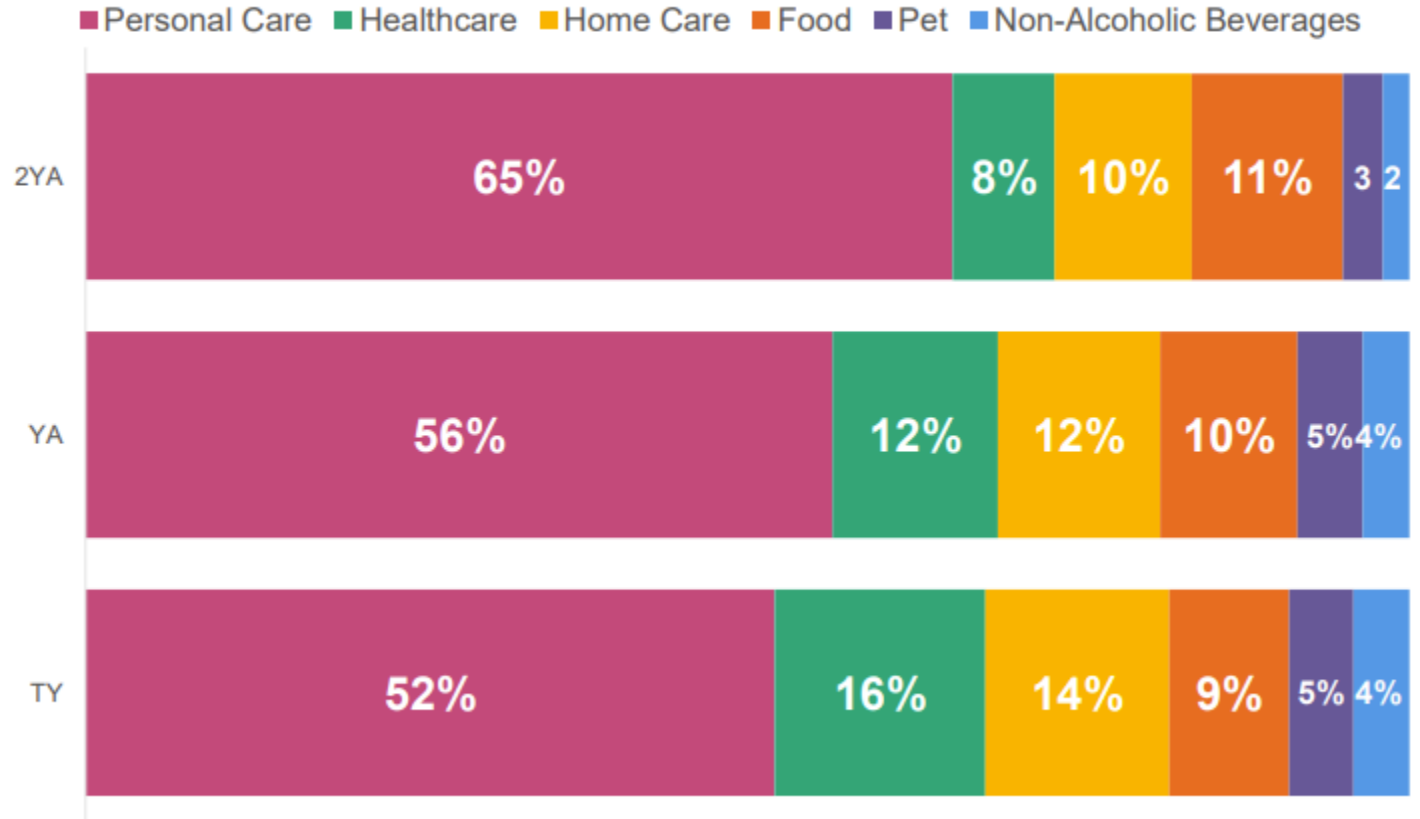
Source: NIQ Omni Sales –Total FMCG Ecommerce - Black Friday week 2023:Ending 31/12/23/ Black Friday week 2024:Ending 01/12/24 Note: Electrical supplies: Batteries and lights



Healthcare is gaining importance on *TikTok*

Consumers are now buying across at least 2 categories on average from TikTok, up from just one category last year.

TikTok Value Sales by FMCG Category

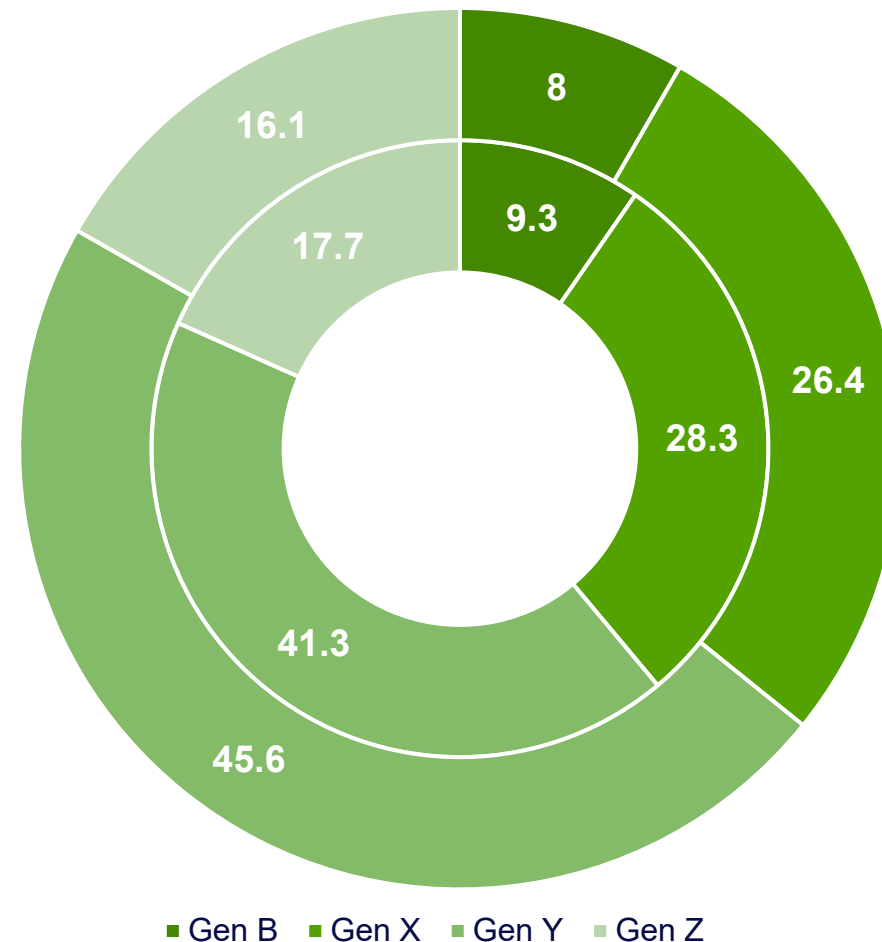


Source: NIQ Digital Purchases | TikTok Shop | Value Share | Latest 12 months to 03.08.25

Gen Y account for almost half of HBPC Prime Day value

*Remember: Gen X accounts
for over a quarter of value.
Avoid overdependence on
Gen Z.*

Prime Day HBPC Value Sales by Generation



Inside ring = MAT

Outside ring =
Amazon Prime
Days 2025

Source: NIQ Digital Purchases | HBPC Value share by age and gender | MAT = 14/07/24 – 13/07/25 | Prime Day 2025 (8th-11th July 2025) | data collected on 18.07.25

Amazon Prime Day 2025 | Value Share split by Hour: HBPC

27% of HBPC value was sold between 8pm and midnight. These periods account for just 17% of time throughout the event.

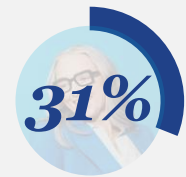
HBPC	Tuesday	Wednesday	Thursday	Friday
00-07h	2.6%	2.4%	2.1%	2.0%
07h-08h	1.3%	0.9%	1.2%	1.1%
08h-10h	3.2%	2.6%	2.3%	1.9%
10h-12h	3.8%	2.3%	1.5%	2.1%
12h-14h	2.5%	3.0%	2.9%	2.0%
14h-16h	2.2%	2.3%	1.7%	1.9%
16h-18h	2.1%	3.0%	2.1%	2.4%
18h-20h	3.0%	2.6%	2.9%	2.1%
20h-22h	3.3%	4.2%	3.9%	2.8%
22h-24h	3.7%	3.6%	2.9%	3.6%

Source: NIQ Digital Purchases | Amazon HBPC | Day by Hour Range | Value Share | Prime Day 2025 (8th-11th July)
Source: NIQ Digital Purchases | Amazon HBPC | Day by Age Group | Value Share of Week | Prime Day 2025 (8th-11th July)

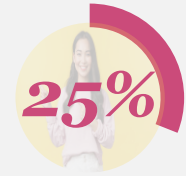
Amazon Prime Day 2025 | Value Share split by Age: HBPC

Day 1 is typically the most important, but Gen Y tend to spend even more on Day 2. Value generally tails off over the final two days, but Gen Z sees a slight final-day uplift.

	Tue	Wed	Thur	Fri
Gen. X	31%	25%	23%	22%
Gen. Y	27%	29%	23%	21%
Gen. Z	27%	27%	21%	25%



Gen X spend their budgets early...



... while Gen Z spend on the final day

5 beauty categories saw an increase in *frequency*

Capture low-cost high-frequency beauty shoppers throughout extended events. This is one of few categories where Gen Z are significant value contributors – consider their shopping patterns.

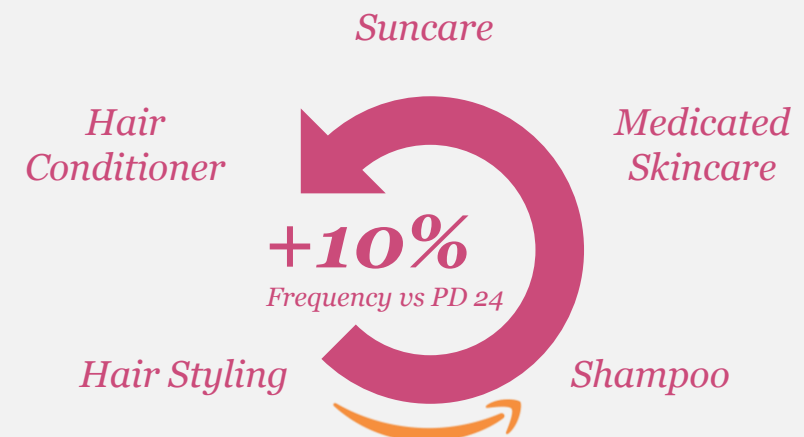
L'ORÉAL PARIS | The Official Skin Care Range by L'Oréal Paris. Shop L'Oréal Paris

See more from L'Oréal Paris in their Store

Skincare Bestsellers Revitalift Laser Regime Retired Guard

Results
Check each product page for other buying options.

NIVEA Q10 Anti-Wrinkle Power SPF15 Firming Cream (50ml), Day Facial Moisturiser to Reduce... Options: 11 sizes ★★★★★ 21,202 2K+ bought in past month Prime Day Deal £5.99 (€11.96/100 ml) RRP: £12.99 £6.07 with Subscribe & Save discount Save 5% on any 4 qualifying items See options	NIVEA Q10 Power 60+ Skin Anti-Wrinkle + Replenishing Day Cream (50 ml), Powerful Anti Ageing Crea... Options: 11 sizes ★★★★★ 6,123 2K+ bought in past month Prime Day Deal £6.98 (€13.86/100 ml) RRP: £11.96 £6.88 with Subscribe & Save discount Save 5% on any 4 qualifying items See options	Kiehl's Ultra Facial Cream, Face Moisturiser For Women & Men, Suitable for All Skin Types... Options: 11 sizes ★★★★★ 83 50+ bought in past month Prime Day Deal £48.75 (€13.96/100 ml) RRP: £55.00 £46.75 with Subscribe & Save discount Exclusive Prime price See options	Olay Vitamin C Face Moisturiser Day Cream SPF 30, Skincare with Niacinamide 99% Purity Brightenin... Options: 11 sizes ★★★★★ 325 600+ bought in past month Prime Day Deal £15.98 (€31.96/100 ml) RRP: £31.96 Save 5% on any 4 qualifying items See options	L'Oréal Paris Revitalift Hydrating SPF 30 Day Cream, Smooth Wrinkles, Firms and Moisturise Skin, Pro... Options: 11 sizes ★★★★★ 10,567 4K+ bought in past month Prime Day Deal £6.98 (€13.96/100 ml) RRP: £11.96 £6.98 with Subscribe & Save discount Save 5% on any 4 qualifying items See options
NIVEA Soft Rose 24h Day Cream (50 ml), Face Care with Rose Water and Hyaluronic, Light Gel Face Cream for... Options: 2 sizes ★★★★★ 3,327 5K+ bought in past month Prime Day Deal £2.99 (€5.98/100 ml) RRP: £5.98 £2.69 with Subscribe & Save discount Extra 10% off subscription voucher FREE delivery Fri 11 Jul on your first eligible order to UK or Ireland Or fastest delivery Tomorrow, 9 Jul Add to basket	L'Oréal Paris Wrinkle Expert Anti-Wrinkle 35+ Day Cream, Reduces Wrinkle Appearance, Firms and... Options: 11 sizes ★★★★★ 3,587 3K+ bought in past month Prime Day Deal £4.25 (€8.50/100 ml) RRP: £8.50 £4.73 with Subscribe & Save discount Get 2 for the price of 1. See options	Clarins Multi-Active Day Cream Dry Skin 50ml Options: 11 sizes ★★★★★ 74 100+ bought in past month Prime Day Deal £37.80 (€75.60/100 ml) RRP: £55.00 Save more with Subscribe & Save FREE delivery Fri 11 Jul Or fastest delivery Tomorrow, 9 Jul Add to basket	Revolution Pro, Miracle Cream, Hydrating & Beautifying Face Cream, Reduces Dull Complexions... Options: 11 sizes ★★★★★ 3,344 3K+ bought in past month Prime Day Deal £6.25 (€12.50/100 ml) RRP: £12.50 £7.12 with Subscribe & Save discount Save 5% on any 4 qualifying items See options	Aveeno Face Calm+Restore Oat Gel Moisturiser (1x 50ml), Face Moisturiser to Instantly Soothe and... Options: 11 sizes ★★★★★ 3,466 10K+ bought in past month Prime Day Deal £7.12 (€14.24/100 ml) RRP: £14.24 £8.08 with Subscribe & Save discount Save 5% on any 4 qualifying items See options



Search: Amazon: "face cream", Tues 8th July

Source: NIQ Digital Purchases | Amazon | Frequency vs Prime Day 2024, Gen Z Contribution to Event Value | Haircare & Skincare Categories | Prime Day (8th- 11th July 2025)

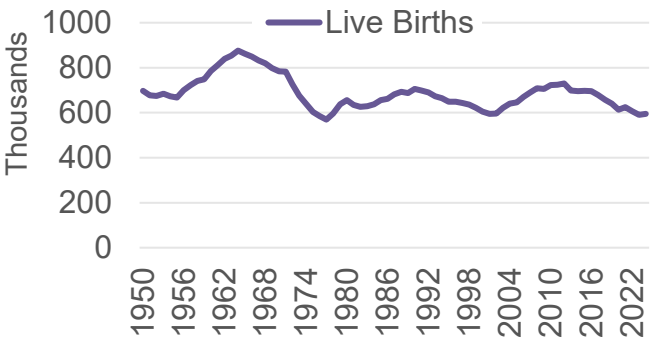


Shifting Demographics

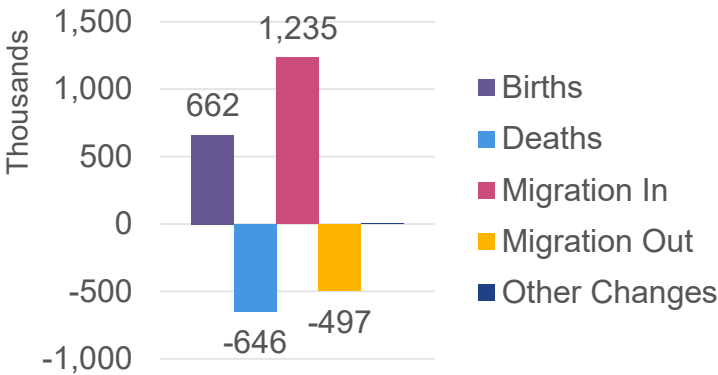
The UK shopper base is changing



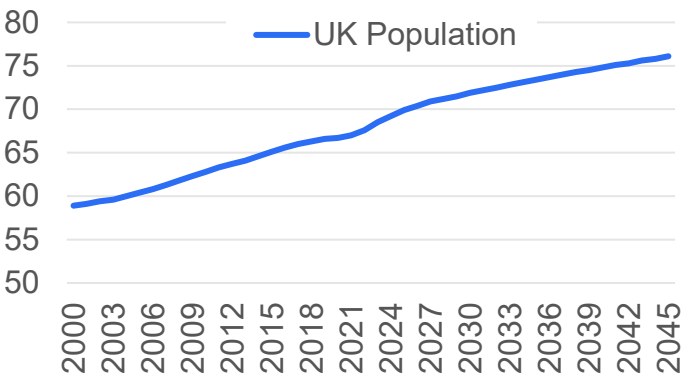
Birth rates are stabilising



Net immigration will increase



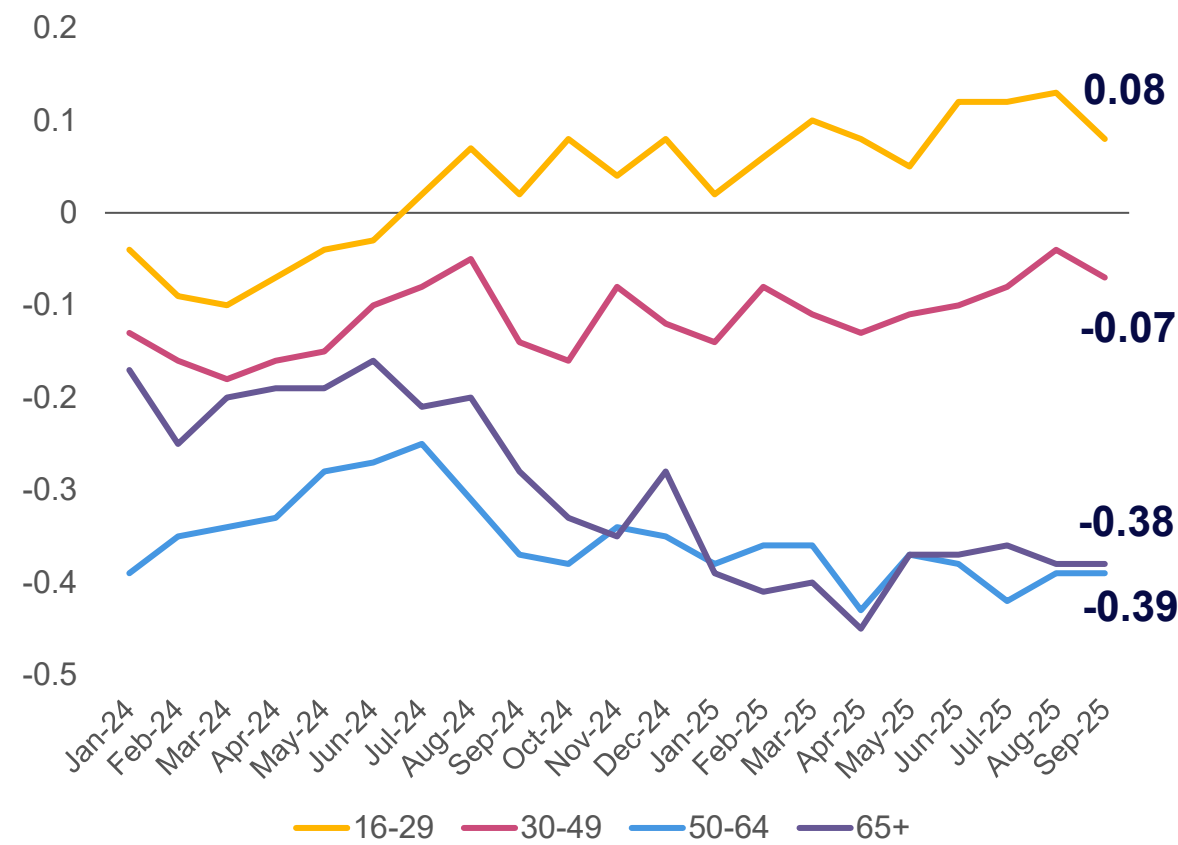
The population will increase



Source: [Births in England and Wales - Office for National Statistics](#), [Population estimates for England and Wales - Office for National Statistics](#), [National population projections - Office for National Statistics](#)

Older consumers have become less confident in the last year whereas younger consumers have grown into positive territory.

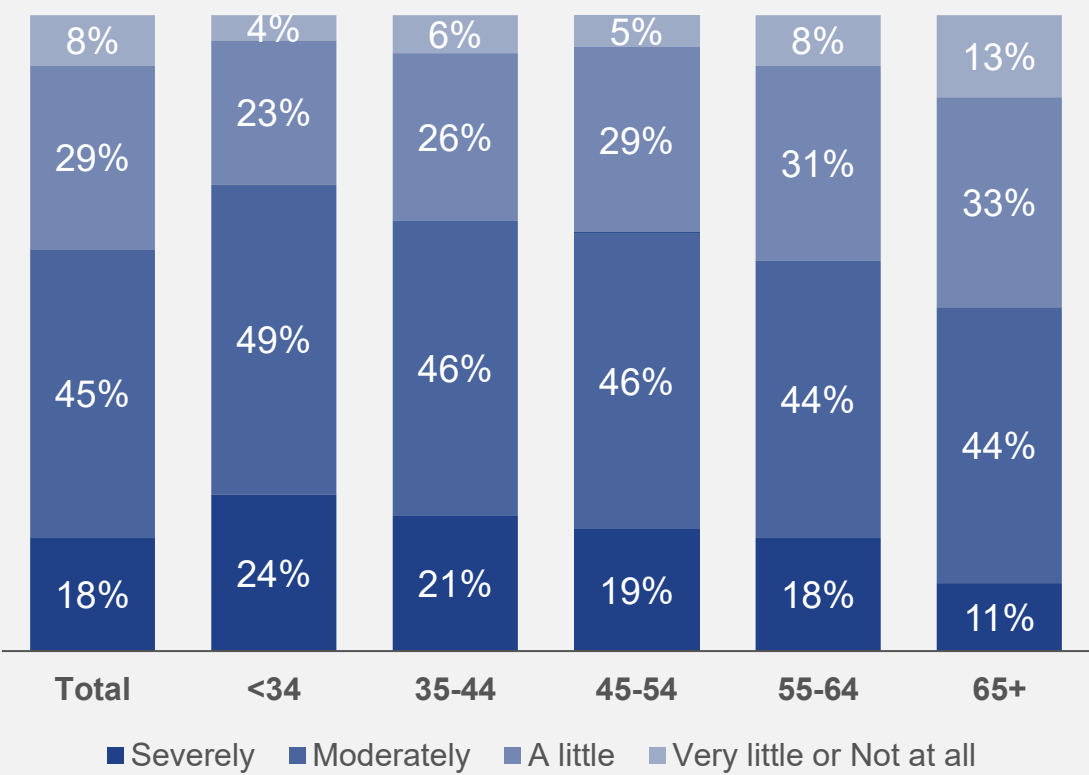
Consumer Confidence | by Age Group



Source: GfK Consumer Confidence | January 2024 to September 2025

In terms of the COL crisis, younger households are impacted the most, but their greater confidence suggests they remain resilient to this climate.

How much is the rising cost of living impacting you at the moment?



Five key population themes that
will impact FMCG purchasing

***Long term
declining
birth rates***

***Having
children later
in life***

***Adult
children
living at
home for
longer***

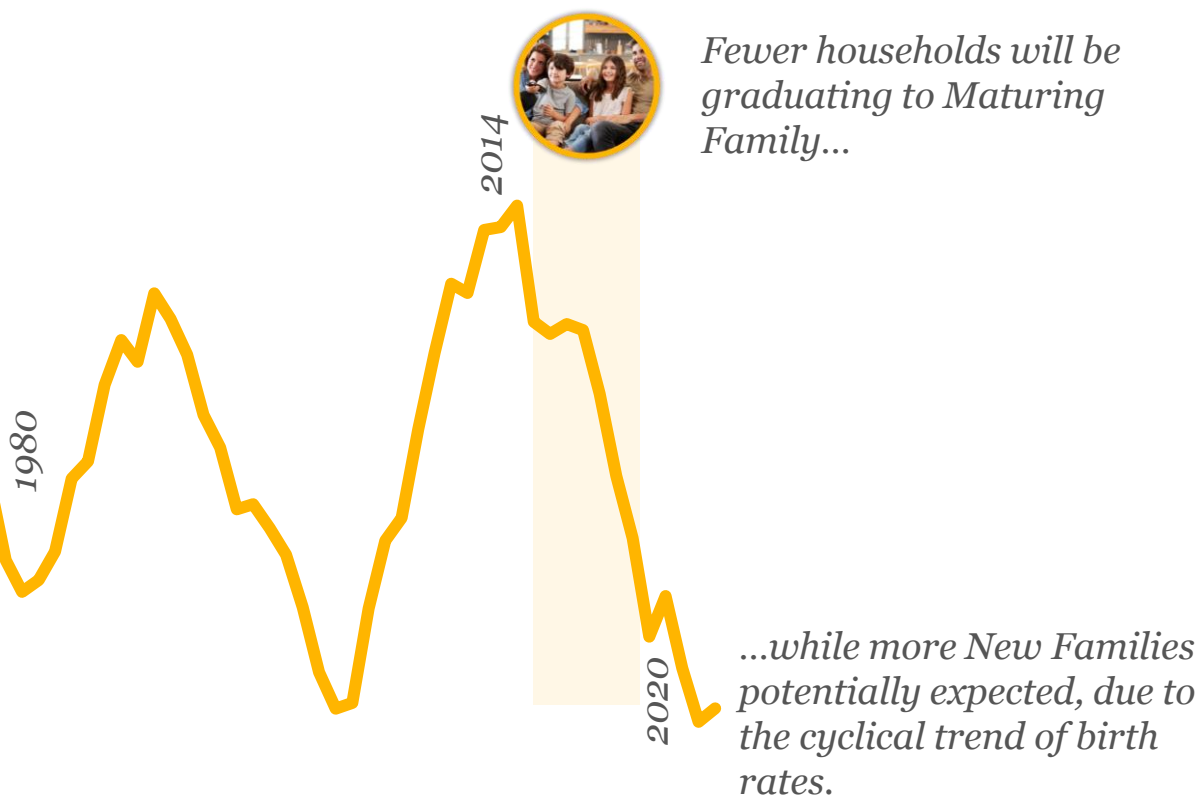
***Population
growth
through
immigration***

***Aging
population***

Maturing Families will contribute less

This is due to the decline in birth rates between 2012 and 2019, which impacts the presence of Maturing Families today (children aged 6-11 only).

UK Birth Rates Since 1980



Source: [Births in England and Wales - Office for National Statistics](#)

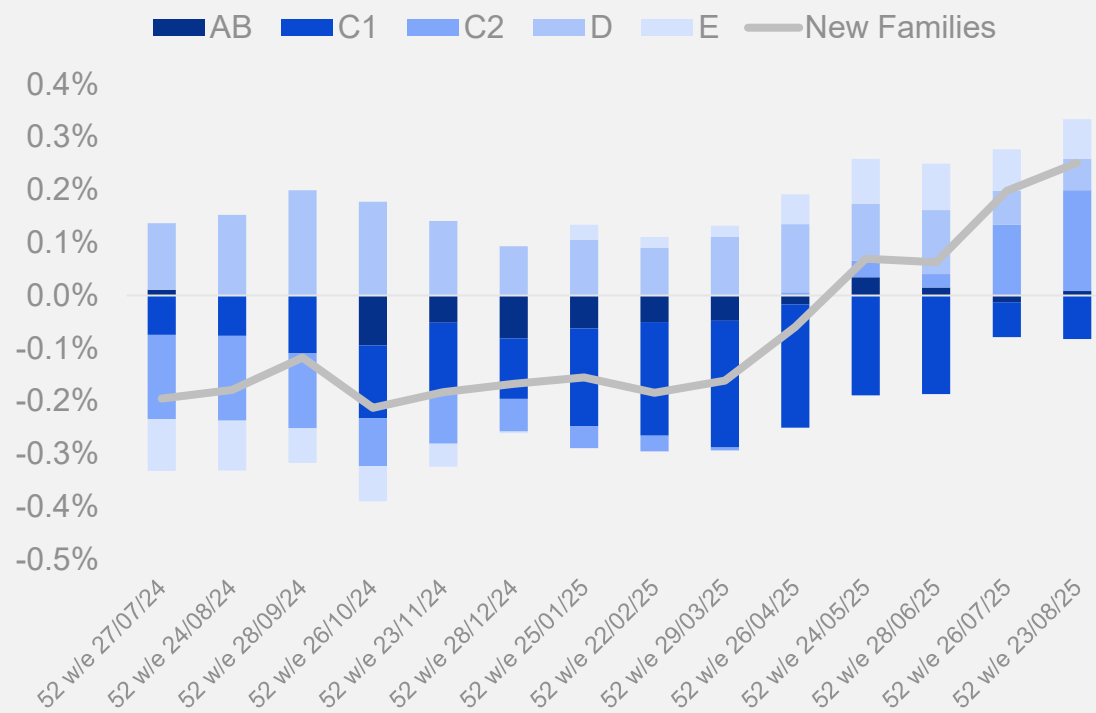


Birth rates are levelling out unevenly

Future New Families will lean more heavily on private label, discounters, promotions and, where possible, the support of the grandparents.

Long term declining birth rates

New Families Contribution to GB Households by Social Grade Change vs Year Ago

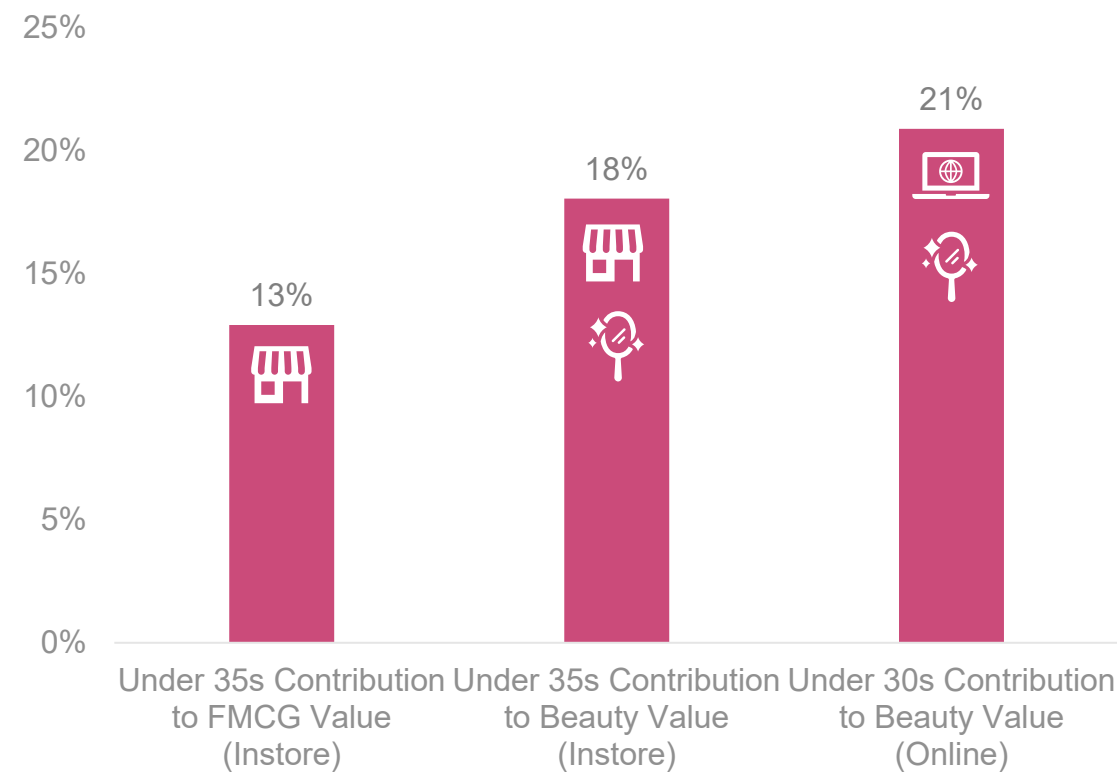


Source: NIQ CPS | Value Contribution to Total Panel | Maturing Families | FMCG | 52we 06.09.25

Gen Z spend on beauty and spend online.

This is despite relatively low spending power compared to older generations. This has accelerated technological innovation in the beauty sector – brands are looking to recruit tech-savvy shoppers.

Gen Z Contribution to Beauty Value



Source: NIQ Panel on Demand, Under 35s, Total FMCG & Total Beauty, GB Instore, 52 w/e 04/10/2025

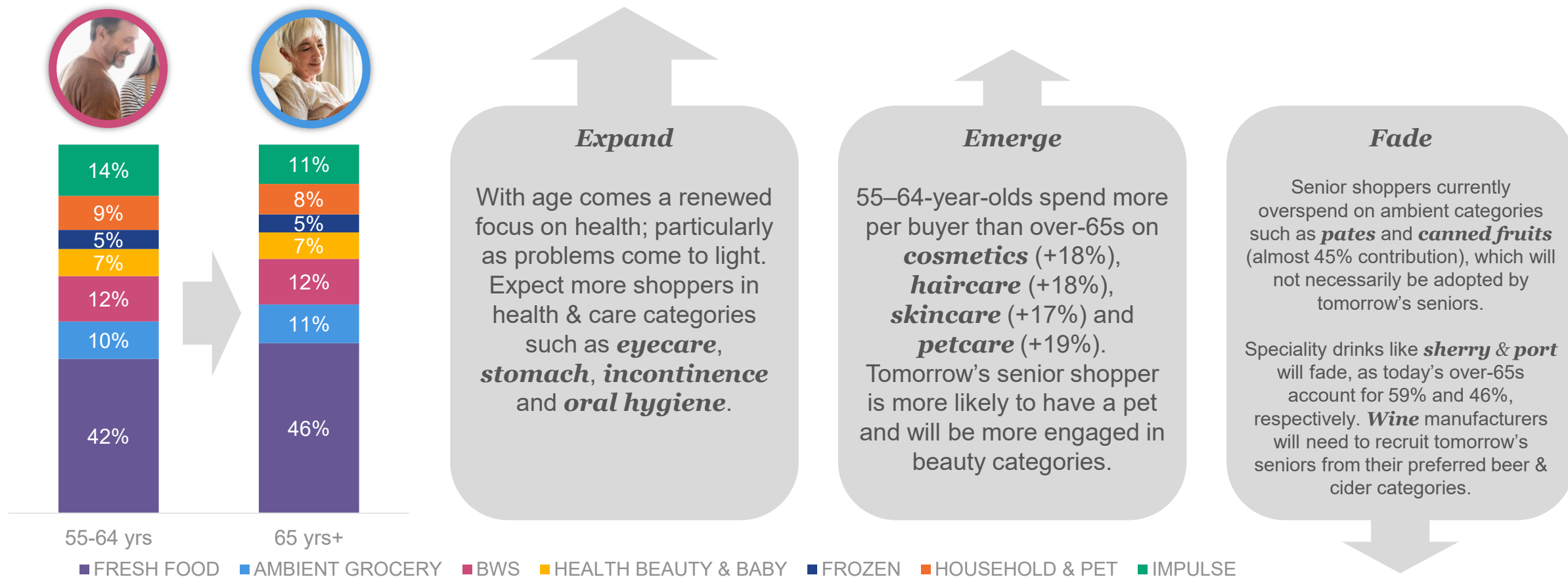
*Source: NIQ Omnisales, Under 30s, Beauty, Total GB, 52 w/e 04/10/2025

Having children later in life



The population among senior shoppers will continue to grow

As shoppers move beyond 65, they will adopt new categories due to their *age*. These categories will **expand**, as they recruit shoppers faster than they lose them. However, these shoppers will bring their *generation's* categories into their later years, and we will see new categories **emerge** among seniors. Simultaneously, we will see today's seniors' *generational* categories begin to **fade**.



Source: NIQ CPS | Over 65s & 55-64-year-olds| FMCG | 52we 06.09.25 | 1-2 Member Households only

Five key population themes that
will impact FMCG purchasing

***Long term
declining
birth rates***

***Having
children later
in life***

***Adult
children
living at
home for
longer***

***Population
growth
through
immigration***

***Aging
population***

Summary of Headlines



Climate & Sentiment

Shoppers remain under heavy pressure, but sentiment is rarely linear across the shopper base. Younger shoppers are typically more pressured, yet more confident with spending.



Industry Spotlight

Beauty continues to drive industry growth, building resilience through shopper connection. Weight loss drugs are set to shake up spending patterns across FMCG.



Digital Landscape

Digital sales events are growing in dates, duration and marketing budgets. Millennials are the typical event shopper, though TikTok's Black Friday activity will likely bring in a younger shopper.



Shifting Demographics

The senior population is growing and becoming more involved in new family life, meaning they will grow in industry value.

Three Opportunities to Consider



GLP-1

Weight loss drugs will have a significant impact on spending habits for at least 1 in 10 households. The full effect on the market is yet to be fully observed, but there is both risk and opportunity for the health & beauty market.



Event Trade-up

With more frequent digital events that last longer, there is more opportunity for challenger brands to be seen during peak times of year. Tie shoppers into bundles or trade up, while they look to spend more on the condition that there is value to be gained.



Senior Health & Beauty

There will be more older shoppers over the next ten years, and their roles and preferences will change in that time. 55–64-year-olds spend more on beauty than today's seniors, and we expect this mindset to remain as they enter later years. Ensure beauty products support the senior shopper.

Questions?



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
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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
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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
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Or click the [link](#)

Reach out:

Alex.Heffernan@nielseniq.com

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!