

Trends and Innovation in the Conscious Beauty and Women's Health Marketplace

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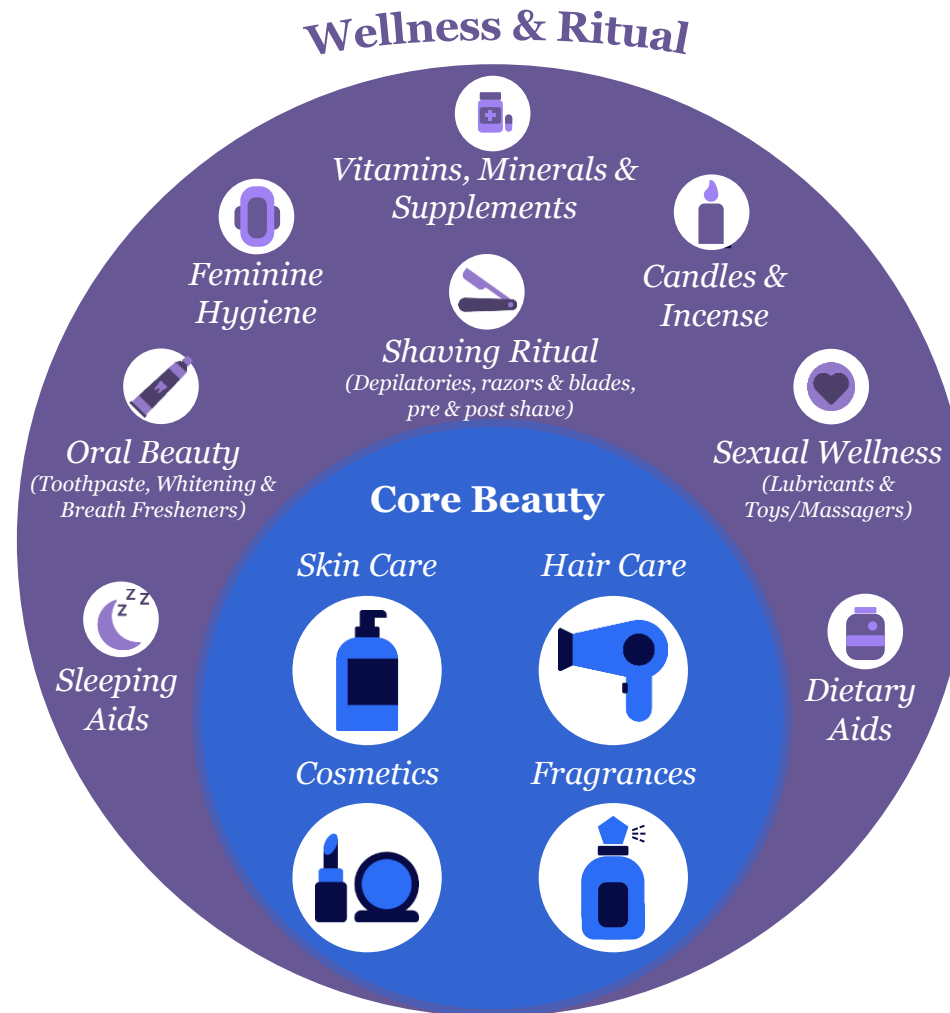
Wellness & Ritual expands the beauty opportunity by 64%

Looking beyond traditional beauty spaces unlocks new white space in adjacent categories, with the value opportunity is 64% larger when wellness and ritual are included in the definition of beauty.

From oral care to vitamins, these wellness routines share consumer motivations and aesthetics with beauty, offering retailers and brands new routes to recruit users and deepen loyalty.

Beauty Within a Wider Wellness Ritual

Modern beauty isn't confined to cosmetics - daily rituals in wellness, health, and personal care are increasingly part of the beauty ecosystem.



Value % Chg. vs YA

+10%

+8%

Source: 58 Markets - NIQ Omnisaies, Omnishopper panel, Strategic Planner Global – Latest 52 Weeks July 2025 | This % indicates how much larger the total value opportunity becomes when wellness and ritual are included in the definition of beauty

Wellness Can be Both Discretionary or Functional

From optional rituals to essential routines, wellness is increasingly defined by how consumers want to feel, not just what they need

Discretionary Wellness

(39% of wellness & ritual value)

+14%

Wellness categories that **are optional enhancements, often used for emotional, sensory, or aesthetic benefit**. These products - such as candles, incense, aromatherapy, and beauty-positioned supplements - are not essential to daily hygiene or health, but **add perceived value** through ritual, mood, or lifestyle association.

Elevated Functional Routines

(61% of wellness & ritual value)

+4%

Products **tied to hygiene or daily care, often seen as necessary**, though shaped by culture, gender norms, and evolving standards. Categories like toothpaste, feminine hygiene, or shaving meet functional needs, but can be **elevated through beauty** aesthetics, sensorial design, and emotional storytelling.

Source: 58 Markets - NIQ Omnisales, Omnishopper panel, Strategic Planner Global – Latest 52 Weeks July 2025

Women’s health and conscious beauty claims are growing, illustrating increased consumer demand

Key Growing Claims in Health & Beauty

Women’s Health

- PH Balance
- Menopause Support
- Hot Flashes
- For Mature Women
- Post Natal
- Breast & Nipple Care
- Estrogen Support
- Perimenopause
- Night Sweats
- Post menopause
- Fertility Support

Clean Label

- Cruelty Free
- Free From Gluten
- Non-GMO
- Hand Made
- Humane
- Leaping Bunny Cruelty Free Cert
- Contains Natural Flavors
- Organic
- Vegan

Sustainability

Environmental:

- Sustainability Cert
- Eco Friendly
- Upcycled
- Contains Sustainable Palm Oil
- Biodiversity
- EPA Safer Choice
- Regenerative Organic Cert
- Energy Star

Social Responsibility:

- B Corp
- Fair Trade
- Veteran Owned
- Cradle to Cradle

Sustainable Packaging:

- Eco Friendly Packaging
- Curbside Recycle
- Recyclable Check Locally
- Renewable Packaging Content

Animal Welfare:

- Cruelty Free
- Humane
- Wild Caught
- Grass Fed

* Established Claims | New Claims under 100 UPC Selling L52W

Source: NIQ Retail Measurement Services, NIQ Product Insight—powered by Label Insight, Total US Full View + Costco; Health & Beauty Department¹; % \$ Chg. vs. YA; 52 weeks ending January 24, 2026
¹ Including only Bath & Shower, Cosmetics & Nail, Deodorant, Facial Skin Care, Feminine Care, Fragrances, Hair Care, Hair Removal, HBL, Oral Hygiene, Sexual Health, Sun Care, Vitamins & Supplements

Women’s life stages drive behavior changes



Menstruation

**Fertility &
Prenatal**

**Pregnancy &
Lactation**

Menopause +

General Health

Behavior changes

Categories

Claims

Functional ingredients

Symptoms (physical and psychological)

Beneficial ingredients

Beneficial nutrients

Services

With trust being paramount, there are critical elements that truly matter most to females overall...

Self-Research

64%

research treatment options independently before consulting their doctor

Challenging Doctors

61%

are willing to challenge their doctor's recommendations regarding their health

Doctor Recommendations

57%

worry that doctors recommend treatments based on financial incentives, and this concern is also growing

Alternative medical care

56%

are incorporating more alternative medical care into their lives over traditional care

Homeopathic medicine

45%

trust homeopathic medicine

Alternative medicine

44%

prefer alternative medicines over traditional ones, and 60% believe herbal supplements are effective

50%
of consumers are
willing to pay
more for
**'Ingredient /
Supply
Chain
Transparency'**

MRI Simmons women's health study



***Rising among women as top reasons to trust brands
2019-2025:***

- *Support local communities*
- *Honest business practices*
- *Prioritize customer needs over profits*
- *Demonstrate core values you admire*



Declining among women as top reasons to trust brands:

- *Environmentally friendly*
- *High-quality products/services*
- *Listen to customers & respond to their needs*
- *Make safe products*
- *Sell products/services at reasonable prices*

Source: MRI Simmons Women's Health Study; NIQ Consumer Life US 2025 T4

... and innovation continues to shine around the globe with considerable variety across those elements

Sustained Trends

(Most developed & globally consistent trends)

Clean & Sustainable
*Formulation
Packaging
Supply Chain*


Ingredient Focus
*Hyaluronic Acid
Niacinamide
Retinol*


Trusted Advisor
*Celebrities
Influencers
Dermatologists*


Emerging Trends

(Strong trends - at different stages of cycle regionally)

Personalization & Inclusivity
*Individual Needs
Taboo Topics*


Format Evolution
*Fuss-Free Formulas
Easy Application*


Wellness Focused
*Functional Drinks
Stress Relief*


Region Specific Trends

(Key trends in some markets but less relevant in others)

Convenience & Accessibility
*Home treatments
Direct to Consumer*


Luxury For All
*Dupes
Quiet Luxury*


Point in Time Trend

(Peak has passed but aftereffects continue)

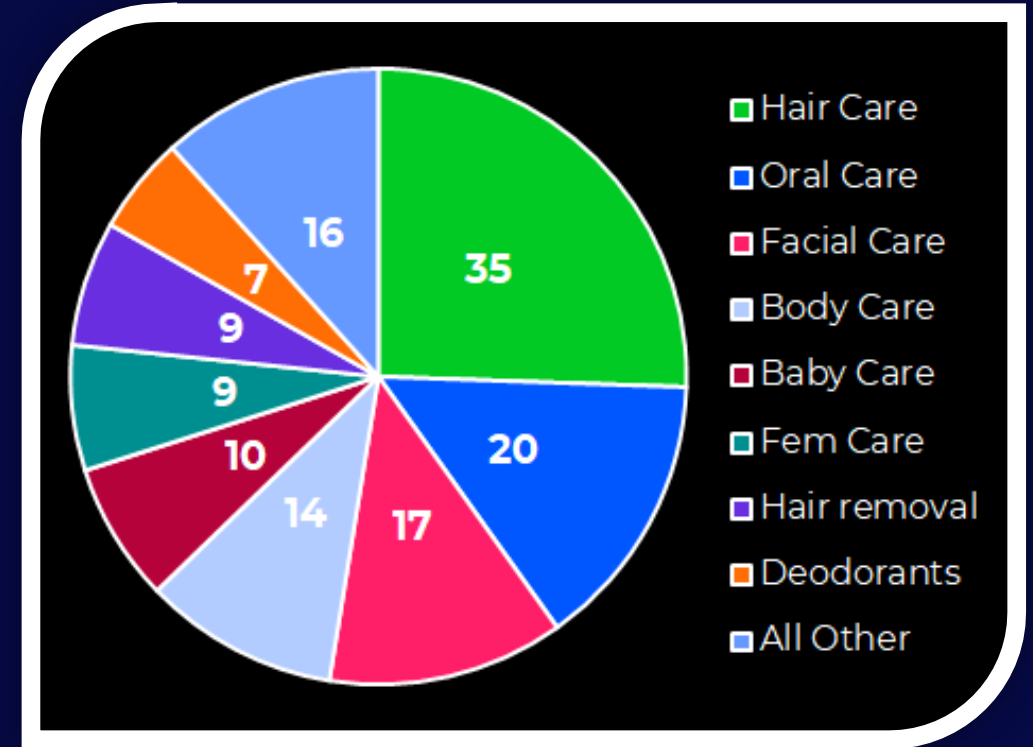
Immunity & Health Support
*COVID-19 legacy
Vitamin C*


Source: Trend classifications are adjudged based on the expertise of local NIQ associates in highlighted markets. Based on 14 global markets.

NIQ BASES Breakthrough Innovation

*14 years of innovation
excellence in Health and
Beauty/Personal Care*

By 2021, there were ~140 Personal Care BASES Breakthrough Innovation winners across the globe in 10 years



*Some Breakthrough winners fall under several subcategories. They have been allocated to the subcategory with the highest expected volumes.

**All Other include subcategories with less than 5 winners.

At that time, personal care breakthroughs revolved around convenience, accessibility, sustainability and customization



**Sally Hansen
Miracle Gel**
2016 winner [US]



Carol's Daughter
2018 winner [US]



**Maybelline Super Stay
Matte Ink Lipstick**
2019 winner [Spain]



Maui Moisture
2019 winner [US]



Garnier Hydra Bomb
2019 winner [KSA]



L'Oréal Magic Retouch
2020 winner
[Argentina & Mexico]



Mamaearth
2020 winner
[India]



**Love Beauty and
Planet**
2020 winner [US]



Native Deodorant
2021 winner [US]



**Rexona Natural Brightening
Deodorant Dry Serum**
2021 winner [Indonesia]

Advertising for 2022 Winner Voltaren leveraged familiar content to create a hook for key benefits and branding



Health & sustainability benefits fueled the growing interest in natural personal care products in 2023 with a focus on jobs to be done

61%*

of consumers said
'Natural' was
more important to
them than it was
five years prior



(US)

Clean ingredients

Free of sulfates,
parabens, silicone, dye

Vegan & cruelty-free

Reducing environmental
impact



(Canada)

Free of dyes, artificial

sweeteners/flavors,
parabens, triclosan,
microbeads, & gluten

Vegan & cruelty-free

Responsibly sourced
ingredients & materials



(US)

Capitalized on consumers'
desire for an effective
product that offers both
skincare AND sun care
benefits, running pricing &
claims tests to ensure a
good value for sun protection
with premium skincare
benefits

In 2024, offering an advantage through innovation and technology was a winning strategy, sometimes resulting in a complete category overhaul



Introduced **hydrocolloid technology** to the US market, offering a gentle yet effective acne treatment without harsh ingredients

NIQ BASES
Breakthrough
Innovation
2024

Outrageously Effective
Whole Body Deodorant
For Pits, Privates & Beyond



Lumē Deodorant
2024 US Winner

A **whole body deodorant** that blocks bacteria from digesting fluids on your skin and prevents body odor from happening in the first place, anywhere on your body.



By 2025, Breakthrough Winners used their *VALUE PROPOSITION* to REFRAME the value reference altogether...

Luxury Lip Oil Brands



Dior Addict
Lip Glow Oil

Clarins Lip
Comfort Oil

Fenty Treatz
Lip Oil

\$42

\$30

\$25



e.l.f. Glow Reviver Lip Oil



... and social activation fueled personal care winners + brand awareness and retail-goal-focused distribution strategies in 2025

Drop Culture Strategy

Mimicked Crumbl's hype-building tactics with flavor-inspired body wash drops, teased through social leaks and influencer buzz



3.5B+
earned & social
impressions

101M+
social views

5,000+
user response
videos

Walmart Retailer Exclusive

Viral Buzz

TikTok reviews and user-generated content drove massive visibility

37B+ organic media impressions
and regularly listed as a top lip product
from key beauty editors



Ulta Retailer Exclusive

Looking Ahead: Consumers around the globe are looking for an easier personal care shopping and execution experience in 2026 and beyond



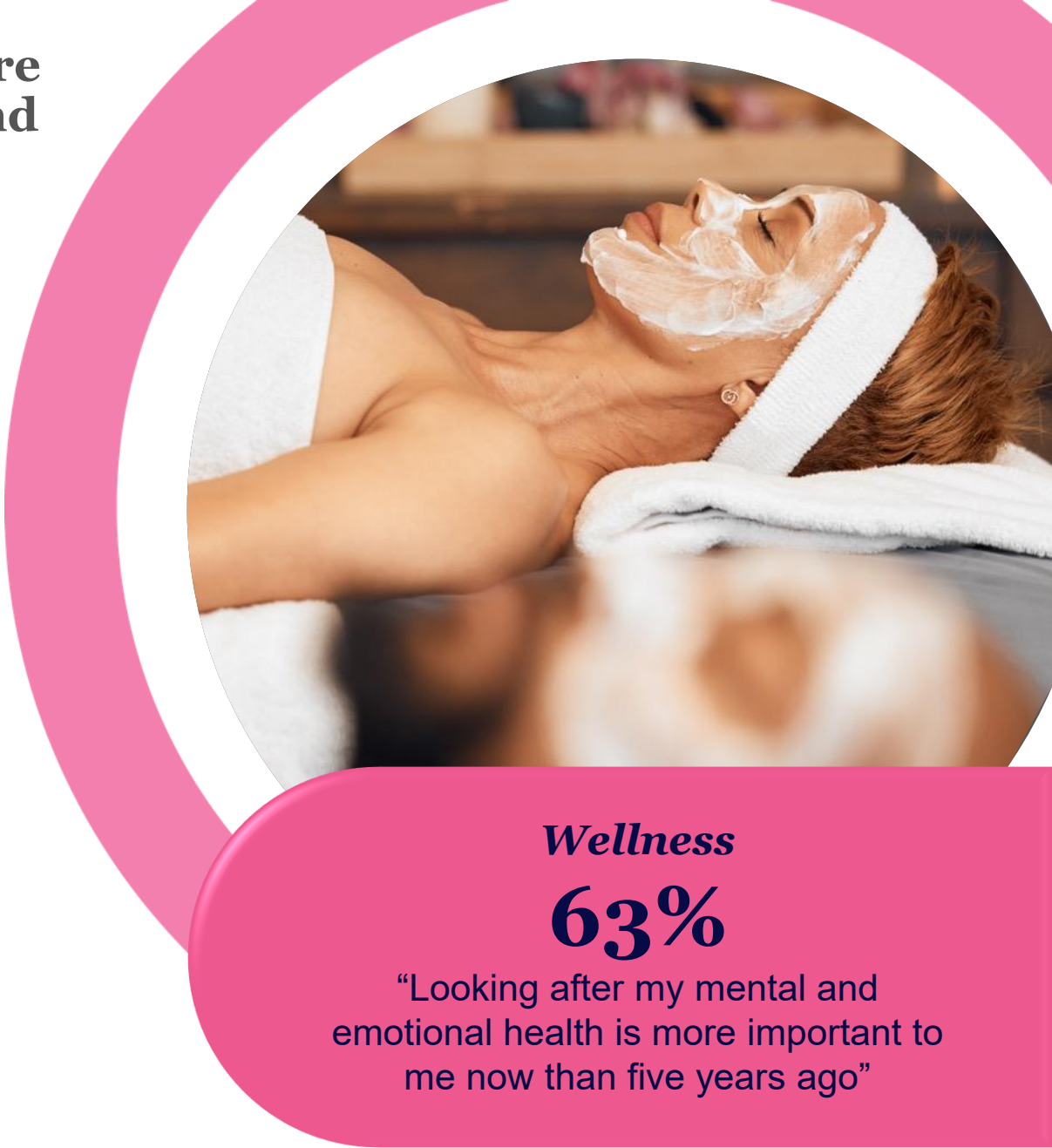
Transparency

49%
of consumers are willing to pay more for products claiming a 'Local Country or Community Origin'



Simplicity

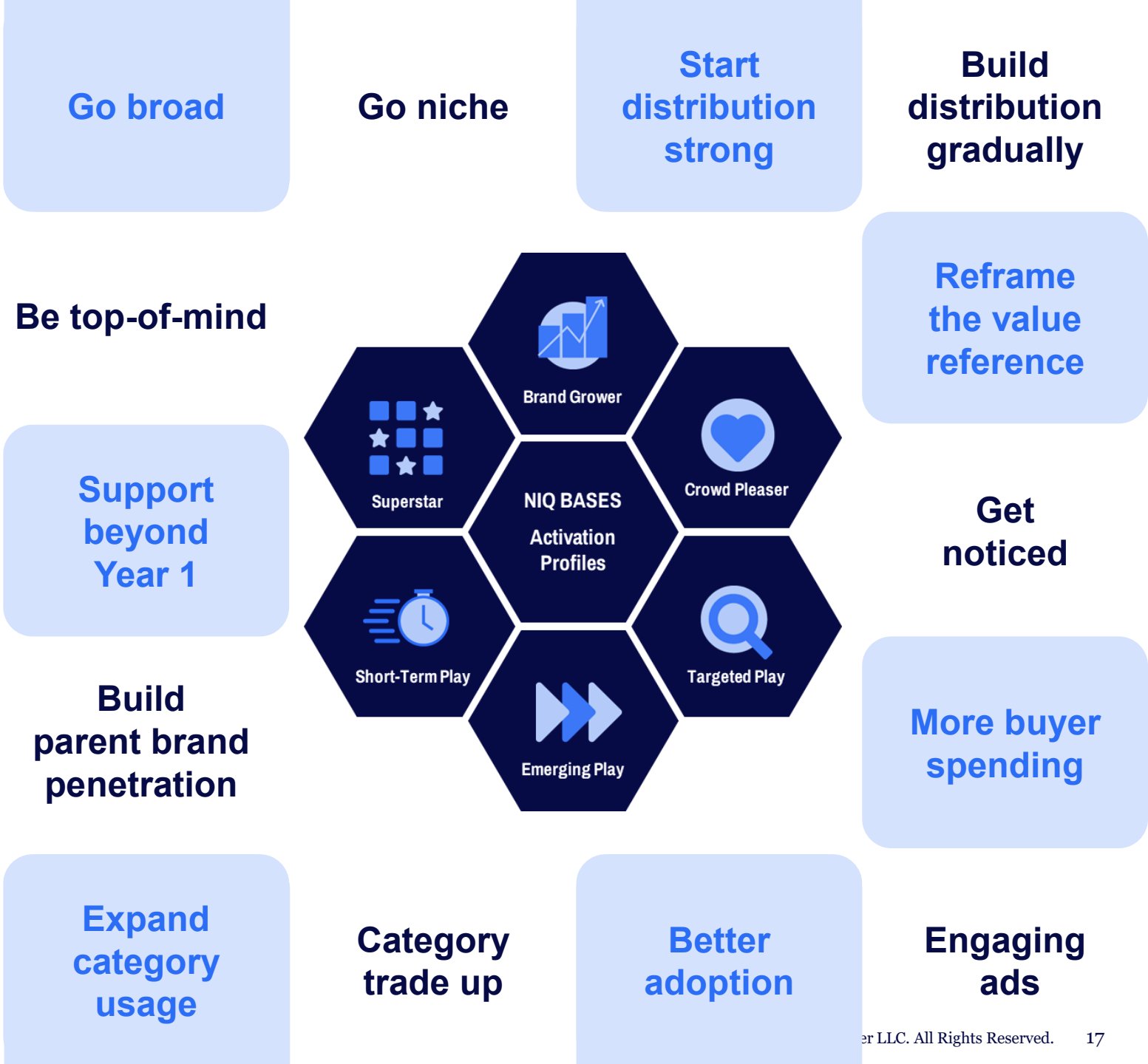
52%
of global consumers are willing to pay more for products that make tasks easier / less time consuming



Wellness
63%
“Looking after my mental and emotional health is more important to me now than five years ago”

Source: NielsenIQ Consumer Outlook 2025; NIQ 2025 Global Health & Wellness survey

What will you do differently to “breakthrough” with your personal care innovations?



Thank You!

To continue the conversation, please see me after the session or scan the QR Code below to download today's presentation!



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Also, join us for “A Perspective on Wellness” webinar on March 25

