Market Focus: Trends and Developments in the Skincare Sector in the UK

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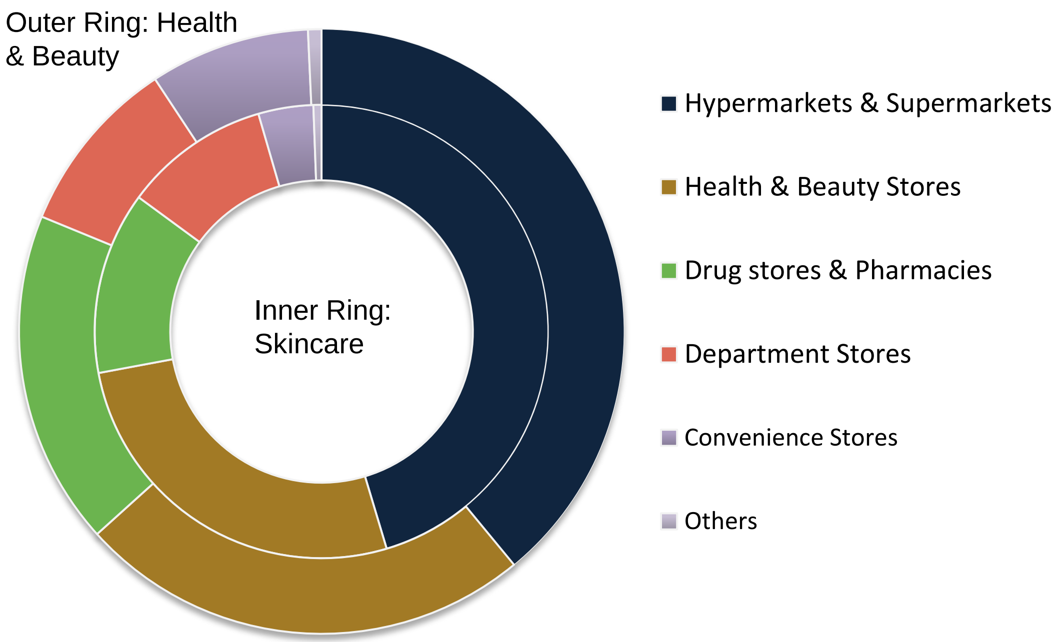
Contents

Hypermarkets & Supermarkets dominate the distribution of Skincare products along with other Health & Beauty products



Hypermarkets & Supermarkets were the most important retail outlets for Health & Beauty products in 2012, accounting for XX% of overall Health & Beauty markets, followed by Health & Beauty Stores with XX% and Drug Stores & Pharmacies with XX%.

The distribution pattern does not differ substantially between Skincare and other Health & Beauty products in the UK, with Hypermarkets & Supermarkets, Health & Beauty Stores, and Drug Stores & Pharmacies dominating Skincare distribution with sales value shares of XX%, XX%, and XX% respectively. Hypermarkets & Supermarkets dominated distribution for both Skincare as well as other Health & Beauty products due to their convenience and ability to price products competitively.

In addition, Convenience Stores constituted only XX% share of retail Skincare sales in 2012 as it's a less popular distribution channel for Skincare and other Health & Beauty products.

Body Care - Key Retailers

- Hypermarkets & Supermarkets: XX%
- Health & Beauty Stores: XX%
- Drug stores & Pharmacies: XX%

Facial Care - Key Retailers

- Hypermarkets & Supermarkets: XX%
- Health & Beauty Stores: XX%
- Drug stores & Pharmacies: XX%

Depilatories- Key Retailers

- Hypermarkets & Supermarkets: XX%
- Health & Beauty Stores: XX%
- Drug Stores & Pharmacies: XX%

Make-up Remover - Key Retailers

- Hypermarkets & Supermarkets: XX%
- Health & Beauty Stores: XX%
- Drug Stores & Pharmacies: XX%

Hand Care - Key Retailers

- Hypermarkets & Supermarkets: XX%
- Health & Beauty Stores: XX%
- Drug Stores & Pharmacies: XX%

Demand for Rigid Plastic Bottles and Flip/Snap Top with Dispenser closures will be driven by increased use of Body Care and Facial Care products

The growing demand for Body Care and Facial Care products in the UK will result in a parallel demand for Flexible and Rigid Plastic Bottle Packaging along with Screw Top and Dispenser closures. Demand for Box outers will also increase as a result of the rising consumption of Body and Facial Care products.

Key Packaging Materials in 2017

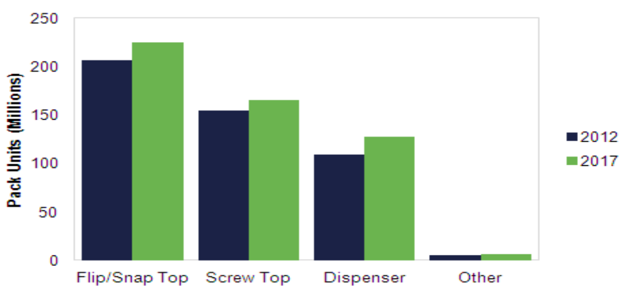
Rigid Plastic packaging is quickly being seen to replace Flexible Packaging in Body Care, with the former witnessing a XX% increase in volume share in the UK Skincare market between 2007-2017. Flexible Packaging and Rigid Plastic Bottles, which are both lightweight and cheaper to produce, are in turn replacing the use of Glass packs for Facial Care products.

Key Packaging Types in 2017

Bottles will account for XX% of all the pack units used in 2017, due to its immense popularity as a packaging type for Facial and Body Care products. Furthermore, the number of Tubes will register a sound increase, due to their growing use in Facial Care products.

Meanwhile, Jar as a pack type will see a XX% decline, due to a drop in its use in the Facial Care and Hand Care categories.

Key Packaging Closures in 2017



Growth in the demand for Flip/Snap Top and Dispenser closures will be led by an increase in their use for Facial Care products.

Key Packaging Outers in 2017

The growing consumer demand for Facial Care and Body Care products will result in a substantial increase in the number of Box outers used in 2017. The number of Box outers used for products in both categories will increase from XX million units in 2012 to XX million units in 2017.