

Global Clean Beauty Market: Analysis By Product Type (Skin Care, Hair Care, Cosmetics, Fragrances, and Others), By Distribution Channel (Speciality Stores, Hypermarkets & Supermarkets, Online, and Others), By Region Size And Trends With Impact Of COVID-19 And Forecast up to 2028

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Abstracts

The global clean beauty market was valued at US\$7.22 billion in 2022. The market value is expected to reach US\$14.36 billion by 2028. Clean beauty means that the product is non-toxic, free of harmful ingredients, and has all the ingredients mentioned in the labeling. Clean beauty doesn't shy away from synthetic (or lab-created) ingredients—as long as those synthetic ingredients are safe.

Consumers are paying close attention to the ingredients in products, which is driving strong demand for clean beauty products. Over the past couple of years, consumers have spent more time focusing on skincare versus makeup which has driven increased awareness of ingredients in products. The higher up on the clean spectrum, the higher the growth. Moreover, younger consumers are slightly more inclined to purchase only clean products. The market is expected to grow at a CAGR of approx. 12% during the forecasted period of 2023-2028.

Market Segmentation Analysis:

By Product Type: The report provides the bifurcation of the market into five product types: Skin Care, Hair Care, Cosmetics, Fragrances, and Others. Skincare held the major share of the market, whereas cosmetics is expected to be the fastest-growing segment in the forthcoming years. The skin care market's growth is supported by the

growing knowledge of the harmful effects of chemicals and synthetic products. Furthermore, the growing e-commerce sector is expected to enhance market growth even more.

The growth in clean cosmetics products accrued to rising disposable income and an increasing population. Moreover, rising financial independence among women and beauty consciousness among men are other significant factors contributing to product demand. Furthermore, the influence of clean cosmetics products with the help of social media is anticipated to further fuel the product demand during forecasted years.

By Distribution Channel: The report further provides the analysis based on distribution channel: Speciality Stores, Hypermarkets & Supermarkets, Online, and Others. Specialty stores held the highest share of the market, whereas online is expected to be the fastest-growing segment in the forecasted period. Moreover, specialty retail stores such as Sephora and Ulta are becoming more popular with consumers of luxury beauty and cosmetics products. Also, specialty stores are popular as they let the consumer shop the way they want to shop, across brands.

People's shopping power has been significantly affected by the internet distribution channel, which provides benefits such as doorstep delivery, simple payment options, substantial savings, and the availability of a wide range of products on a single platform. This may generate tremendous opportunities to fuel the global clean beauty market during the projection period.

By Region: The report provides insight into the clean beauty market based on the regions namely, Asia Pacific, Europe, North America, and Rest of the World. Asia Pacific held the major share of the clean beauty market in 2022. It is also expected to be the fastest-growing region in the forthcoming years. Given the increase in conscious consumers, brands are now being held accountable for their claims while also making an effort to cater to the shifting demand for clean beauty products. And this trend gives the power back to the consumers along with the brand to build a more sustainable environment. The concept of clean beauty is picking up in India. The demand for products that suit Indian skin types and hair, a need that largely remained unfulfilled by international brands, is increasing and providing the opportunity for local companies.

As sustainability continues to take center stage with beauty brands, trends like refill and reuse and dissolvable or zero waste beauty are gaining traction in Europe. As the clean beauty industry continues to grow, it is expected that future innovations would transcend only using clean ingredients and focus on managing the waste that had generated over

the years. Moreover, owing to its large consumer population, Europe's clean beauty market is expected to continue to grow in the future.

Market Dynamics:

Growth Drivers: The global clean beauty market growth is predicted to be supported by numerous growth drivers such as surging gen Z and the millennial population, increasing social media users and digital ad spending, increasing consumer awareness, growing e-commerce, increasing disposable income, favorable government regulations and initiatives, and many other factors. The influence of social media on consumer purchasing behavior has been significant. Due to the ubiquitous social media advertising, people are better informed about ingredients and more driven to make environmentally friendly purchases. As a result, the market for clean beauty products has been expanding over the years.

Challenges: However, the market growth would be negatively impacted by various challenges such as the absence of a regulatory body or industry-wide standards, threats from counterfeit beauty products, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as the growing integration of AR, VR, and AI in the beauty industry, product personalization, rising demand for eco-friendly products, search engine marketing, brand collaboration/ partnership, etc. AR and AI technologies are proving both popular and successful in the beauty industry because it can offer shoppers a personalized experience, which aims to make shopping much more targeted and easier for consumers. Whether it's through a skincare diagnostic selfie experience or a shade-matching try-on, AI and AR provide a wide range of solutions to fit in with the needs of a beauty brand and its customers.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic has led to negative growth rates in the initial period, as there was a supply chain disruption that affected the production of clean beauty products. In the later period, people became more aware of clean beauty. When the people's routines were put on hold, consumers started evaluating their lifestyle choices. The typical consumer began reading the fine print of the products they use, only to realize the damage such products have been causing. Thus, owing to the increased level of awareness among consumers, the clean beauty market faced positive growth in the year 2021. In the post-COVID era, the e-commerce of clean beauty products is

expected to increase significantly.

Competitive Landscape:

The global clean beauty market is fragmented. The key players in the global clean beauty market are:

Est?e Lauder Companies Inc.

e.l.f. Beauty, Inc.

The Honest Company, Inc.

LVMH (Sephora)

Natura & Co (Avon Products, Inc.)

Credo Beauty

Orveon (BareMinerals)

Beautycounter

Ilia Beauty

Ere Perez

RMS Beauty

NakedPoppy

Some of the strategies among key players in the market are mergers, acquisitions, and collaborations. For instance, in 2022, The Est?e Lauder Companies Inc. announced that the company had signed an agreement to acquire the TOM FORD brand. On the other hand, in 2022, Keys Soulcare, an e.l.f. Beauty's brand announced that the company had introduced key Soulcare's First Daily Moisturizer with SPF30 to Protect Your Light. Moreover, according to the Environmental Working Group (EWG) ranking, ELF is one of the best among the top-five mass beauty brands. ELF has the lowest percentage of

products in the high-hazard area. Whereas, according to Green, Clean, Responsible (GCR) beauty rankings, ELF uses 100% clean ingredients, and works on meeting Clean 2.0 standards. On the other hand, more than half of the product category in other companies like Maybelline and Cover Girl uses clean ingredients.

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