

THE HEALTH & BEAUTY ASSOCIATION:

Roadmap to 2030

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



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

About the H&BA

Founded in 1969, the H&BA is a ‘not for profit’ trade association. Our focus is on Accelerating **Sustainable** Industry Growth of Health, Beauty & Personal Care Categories. H&BA members are suppliers, both manufacturers and distributors, of many of the world’s leading health, beauty and personal care brands. Associate members include agencies and service providers contracted to health & beauty suppliers.

For over 50 years, we have provided a unique forum for members to debate and discuss how our industry should adapt and develop to meet the changing needs of consumers and customers.

Areas of focus include...

CONSUMER INSIGHTS	TRADE INSIGHTS	CAPABILITY & SKILLS	LEADERSHIP	COLLABORATION
Trends · Data · Consumers & Shoppers	Retailer briefings · Channel Developments · Routes to Market	Processes · Tools · Training Access	Organisation · Culture · Future Leaders	Networking · Suppliers, Agencies and Service Providers · Shaping The Agenda – H&BA Roadmap

Delivered through ...

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Find out more about the H&BA: <https://thehba.co.uk/>

Leading Industry Insights to UK Health & Beauty Suppliers

Our industry

Health,
Beauty &
Personal
Care

Health

**£4.25
billion**

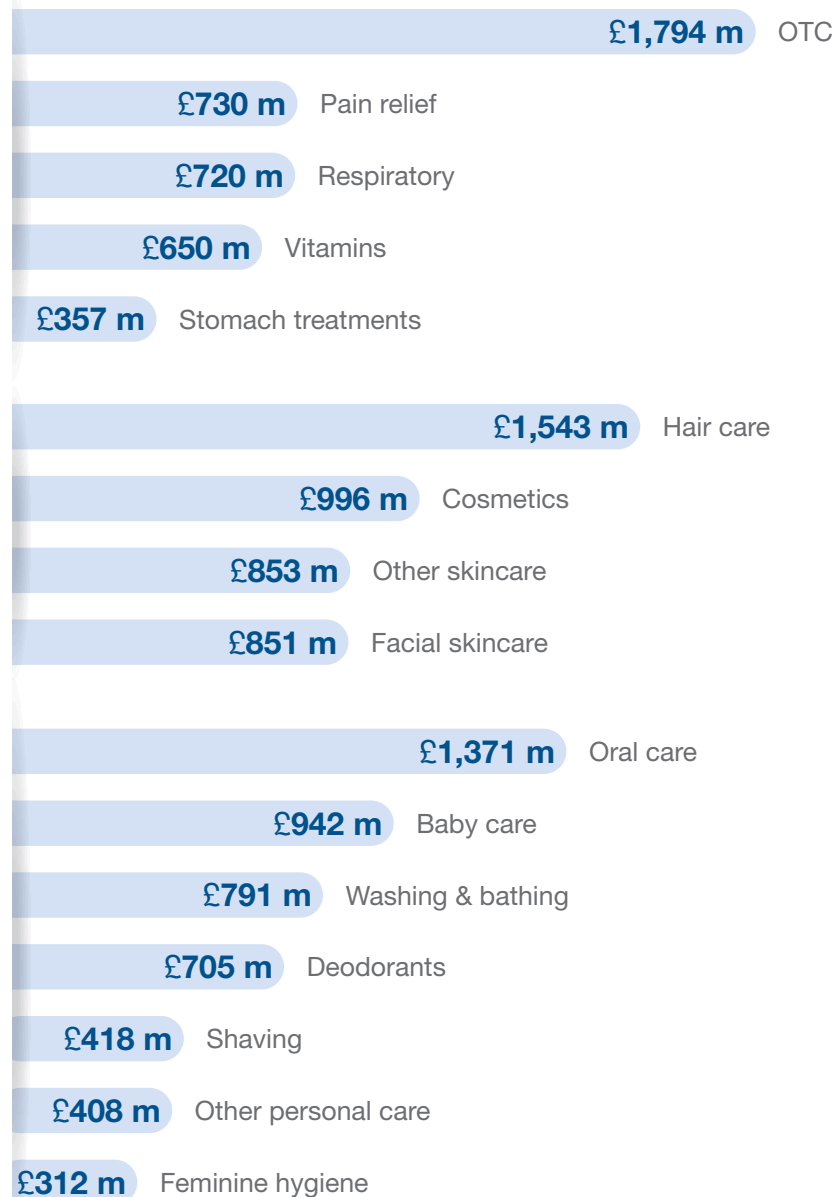
Beauty

**£4.24
billion**

Personal
Care

**£4.94
billion**

£13.44 billion¹
growing at 6% over the past year



NIQ 1. Source: NIQ Scantrack, Total Coverage GB, 52 w/e 28/12/2024.

H&BA Strategic Roadmap 2030

The aim of this report, developed collaboratively with Integration Consulting, is to provide our members and the UK health & beauty industry as a whole **visibility and guidance on how to navigate the market over the next 5 years.**

We do so by outlining key trends among consumers, channels and business practices, along with practical points of consideration for each.

While the outlook until 2030 is marked with critical shifts and even some level of disruption, the future looks bright – especially for those who plan, prepare and act with foresight.

As shown in the level of disruption graphic throughout the report, some trends require only minor adjustments to the business or operating model, allowing companies to continue with business as usual. Others, however, demand more profound changes in how we operate, requiring greater attention and strategic adaptation. This

exercise was carried out as a qualitative assessment based on market research and industry experience by Integration Consulting.

We hope that our Strategic Roadmap 2030 will contribute to the continued success and perpetuity of players in our industry, and provide readers with thoughtful insights.

The H&BA Strategic Roadmap 2030 is divided into three sections:

- 1. Shifting consumer behaviour:** What are shoppers seeking and how are they interacting with health & beauty products?
- 2. Changing retail landscape:** How is the UK retail landscape evolving, across both physical and online channels?
- 3. Growth enablers:** Where should health & beauty players focus to drive growth in the industry?

Report Structure





1. Shifting consumer behaviour

What shoppers seek and the way they interact with health & beauty products is ever changing and evolving. To adapt and thrive in this environment, businesses must understand the **key trends driving shifts among their consumer base**. This means addressing 5 major themes:



I. Demographic changes

- Ageing population
- Increasing diversity
- Urbanisation



II. More informed consumers

- Access to information
- Trend mindset
- Desire to be different



III. Evolving paths-to-purchase

- Role of omnichannel
- Awareness, Consideration, Purchase, Loyalty
- Personalisation



IV. Economic dynamics

- Inflation
- Volume growth
- Spending power & value for money



V. Changing consumer demands

- ESG & natural ingredients
- Convenience & self-care
- Product-service continuum



SHIFTING CONSUMER BEHAVIOUR

I. Demographic changes

Changing faces, changing spaces:

Accelerating demographic changes are reshaping the health & beauty landscape – with huge impacts on market demands and consumer preferences. In the UK, the population is ageing, ethnic diversity is growing and more people are living in urban centres than ever before. The challenge for brands is to quickly adapt to remain relevant.

WHAT IS CHANGING?

Ageing Population

According to ONS projections, over the next 50 years, the number of people aged 65+ in the UK will rise from 12.7 million today (19% of total) to 22.1 million people (27% of total).²

Diversity

Diversity is increasing in the UK, with the percentage of people identifying as non-white having grown from 20% to over 25% between 2011 and 2021.³

Urbanisation

85% of the UK population now lives in cities, up 2.5% from 10 years ago. These consumers seek convenient, multifunctional products that fit into their busier, fast-paced lifestyles.⁴

WHAT DOES THIS MEAN FOR HEALTH & BEAUTY?

Older demographics tend to prioritise skincare, anti-ageing treatments, wellness products and services that enhance longevity and quality of life. This group is becoming more tech-savvy, with **Internet use in the 65+ age group having risen to over 80%**, pointing to growing opportunity for connection via omnichannel approaches.⁵ To effectively engage this audience, brands should place increasing emphasis on **simplifying the online user experience**.

With traditional paradigms being broken, demand is growing for inclusive products that cater to a wider range of beauty and healthcare needs. Fenty, for example, is developing tailored solutions for diverse communities, from more foundation shades to haircare products for textured hair. A more diverse consumers base is looking for **brands that authentically represent their identities, embrace diversity in marketing and cater to unique health and beauty preferences**.

Consumers are more conscious of environmental factors such as pollution, wanting skincare that protects against urban stressors. With urbanisation placing pressure on GPs and doctors, **self-medication and over-the-counter solutions are on the rise** – opening opportunities for brands to offer more accessible, pharmacy-style products, with health benefits clearly labelled. Brands should consider launching tailored products that meet the convenience and healthcare needs of urban dwellers.

An ageing population

65+ consumers to rise from 12.7 million (19% of total) to **22.1 million** (27%) in next decades²

Ethnic diversity

% of people identifying as **non-white-British** increased from 19.5% in 2011 to over **25.6%**³

Urbanisation & lifestyle

85% of UK population now **live in urban areas**, seeking convenient, multifunctional products for busy schedules⁴

Main Impacts



Portfolio & Brand Marketing

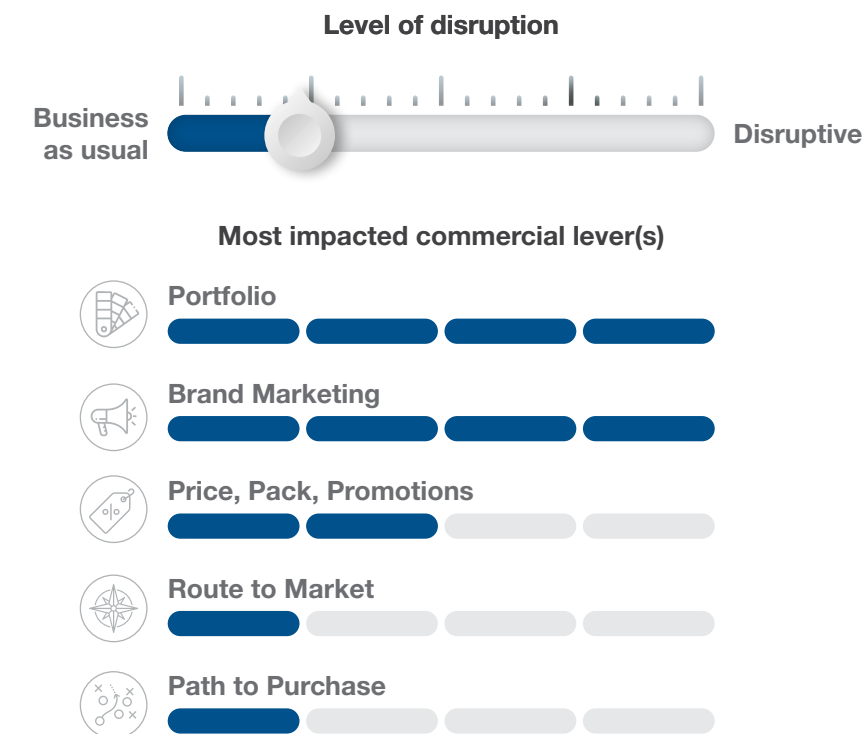
WHAT QUESTIONS DOES THIS POSE?

How can our brand change its **value proposition & portfolio** for more diverse consumers?

How can we leverage **digital tools to connect** with older, tech-savvy consumers?

How can we create **experiences that resonate** with the diverse cultural beauty practices?

WHAT ARE THE IMPACTS FOR MANUFACTURERS & SUPPLIERS?



2. UK Office for National Statistics (2024)
3. Age UK (2024)

4. IBISWorld (2025)
5. gov.uk (2022)



SHIFTING CONSUMER BEHAVIOUR

II. More informed consumers

Leveraging greater access to information:

Consumers have greater access to information than ever before, enabling them to make well-researched and conscious decisions about the products they buy. Many are driven by trends and seek out the latest innovations, while others are turning away from established brands, favouring independent and niche labels that align with their values.

WHAT IS CHANGING?

Access to information

>90% of shoppers research purchases online at least sometimes, with nearly 87% doing so regularly.⁶ Over 90% of consumers in the UK say they typically avoided buying from a business with less than a 4-star rating.⁷ More limited access to healthcare advice is leading consumers to turn to alternative sources for information, e.g. online health platforms and social media.

Trend mindset

Consumer choices are increasingly being defined by trends spread via social media. According to *The 2024 Influencer Marketing Report* by Sprout Social, 49% of all consumers make daily, weekly or monthly purchases because of influencer posts.⁸

Desire to be different

Shopper loyalty has weakened across all age groups, with nearly 40% of shoppers having tried a different beauty brand in the past month – a trend that is projected to rise over the next decade.⁹ Moreover, independent brands are outpacing overall industry growth rates, having expanded 15.7% YOY over the past five years.¹⁰

WHAT DOES THIS MEAN FOR HEALTH & BEAUTY?

Brands must **embrace transparency and provide accessible, clear information** about their products to build trust with consumers, e.g. by providing easy access to data on benefits, ingredients, sourcing and ethical practices. Positioning the brand as a **trusted source of information** is crucial, e.g. by offering expert advice, product education and clear guidance on self-care, especially health and beauty products catering to wellness needs. Companies can **build credibility by leveraging user-generated content** such as reviews and testimonials.

Brand relevance lies in agility: **continuously innovating and introducing novelty**. Opportunity exists to capitalise on trend cycles by offering limited-edition collections, partnering with influencers and engaging in real-time marketing to create a sense of urgency. This requires a **balance between trend-driven product development and maintaining core product lines** to cater to long-term customer loyalty.

There is a need to **prioritise trust-building through transparency, ethical practices and authentic storytelling**. Brands should focus on creating personalised experiences and embracing a wider range of niche, independent product lines that resonate with consumer values. Developing stronger local supply chains and promoting ethical sourcing will support in appealing to **consumers who increasingly value transparency over mass-market offerings**.

Access to information

87% of shoppers regularly research online,⁶ **>90% avoid buying** if rating is **under 4 stars rating**⁷

Trend mindset

49% of consumers make regular purchases **based on influencer posts**⁸

Desire to be different

40% of shoppers tried different beauty brands in past month, **independent brands** grew 16% YOY in last 5 years¹⁰

Main Impacts



Brand Marketing & Path to Purchase

WHAT QUESTIONS DOES THIS POSE?

How do we leverage consumer **demand for transparency** & optimise digital platforms to serve them?

What innovations are needed to **appeal to trend-driven consumers**, maintaining product diversity?

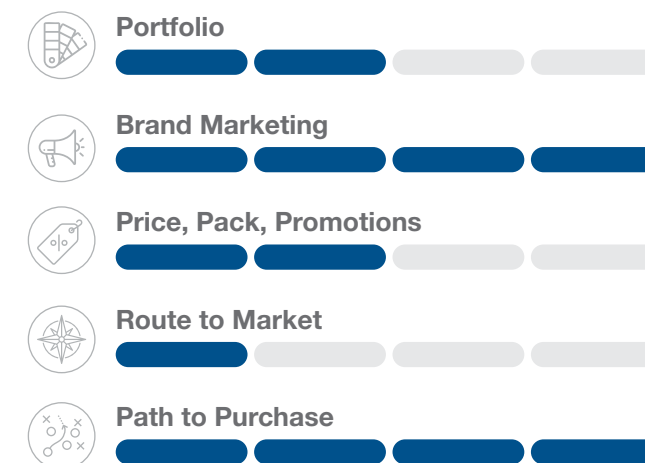
How can brands approach consumers **seeking niche products**, balancing diverse preferences & brand image?

WHAT ARE THE IMPACTS FOR MANUFACTURERS & SUPPLIERS?

Level of disruption



Most impacted commercial lever(s)



6. The Ever-Growing Power of Reviews (2023)
7. Statista (2023)
8. Sprout Social (2024)

9. Morning Consult (2024)
10. Nielsen IQ (2023)



SHIFTING CONSUMER BEHAVIOUR

III. Evolving paths-to-purchase

More integrated, personalised experiences:

Paths-to-purchase are shifting as consumers seek more integrated, personalised experiences. Mobile devices have become central, impacting the shopper experience. Expectations have also changed in the way companies market themselves and build long-lasting relationships with their customers.

WHAT IS CHANGING?

Role of omnichannel

Consumers now rely heavily on mobile apps and mobile-optimised websites for browsing, comparing products and making purchases. Brands such as Tesco are enhancing their apps to boost the user experience, merging the online and offline shopping worlds for a seamless omnichannel experience.

Awareness, Consideration, Purchase, Loyalty

Consumers interact with brands across diverse touchpoints before buying – forcing brands to engage them across multiple channels. Social media, influencers, personalised ads & reviews are key for awareness, with subscription models easily integrating products into routines. Consumers seek engagement beyond purchases – via loyalty programs & post-purchase communications.

Personalisation

Consumer are demanding relevant, customised interactions that make shopping more efficient and enjoyable. Advanced data analytics & AI allow brands to offer hyper-personalised products, services and experiences tailored to individual preferences and behaviour. Innovations like Zoe Tech (personalised nutrition advice based on individual biology) are reshaping the market.

WHAT DOES THIS MEAN FOR HEALTH & BEAUTY?

Companies should consider **investing in mobile-first strategies to stay competitive**. The ability to offer features like virtual try-ons, product availability tracking and tailored recommendations will become critical in attracting and retaining mobile-first consumers. **Integrating mobile with brick-and-mortar experiences** will be key, with some stores beginning to use features such as ‘store mode’.

Brands must adopt a **holistic omnichannel strategy addressing each stage of the consumer journey**. More than a single transaction, building brand loyalty now involves creating engaging content and storytelling to build awareness, provide flexible purchasing options, enhance convenience and offer personalised loyalty programs that add perpetual value. Brands can **transform casual customers into loyal advocates** and drive long-term growth by connecting these and delivering a personalised, consistent experience.

Consumer data can be leveraged for targeted offerings, from personalised skincare regimens to tailored supplement plans. This requires capabilities (and resources) to **track and analyse consumer data**. By capitalising on personalisation, **brands can differentiate themselves, foster customer loyalty and address diverse health and beauty needs** in a more targeted and effective manner.

An omnichannel experience

Consumers **relying heavily on mobile apps** for browsing, comparing products & purchasing

Consumer engagement

Need to **manage multiple channels** to capture attention, facilitate purchase & loyalty

Targeted personalisation

Analytics & AI can respond to demands for **relevant, customised interactions** offering efficient, enjoyable shopping

Main Impacts



Route to Market & Path to Purchase

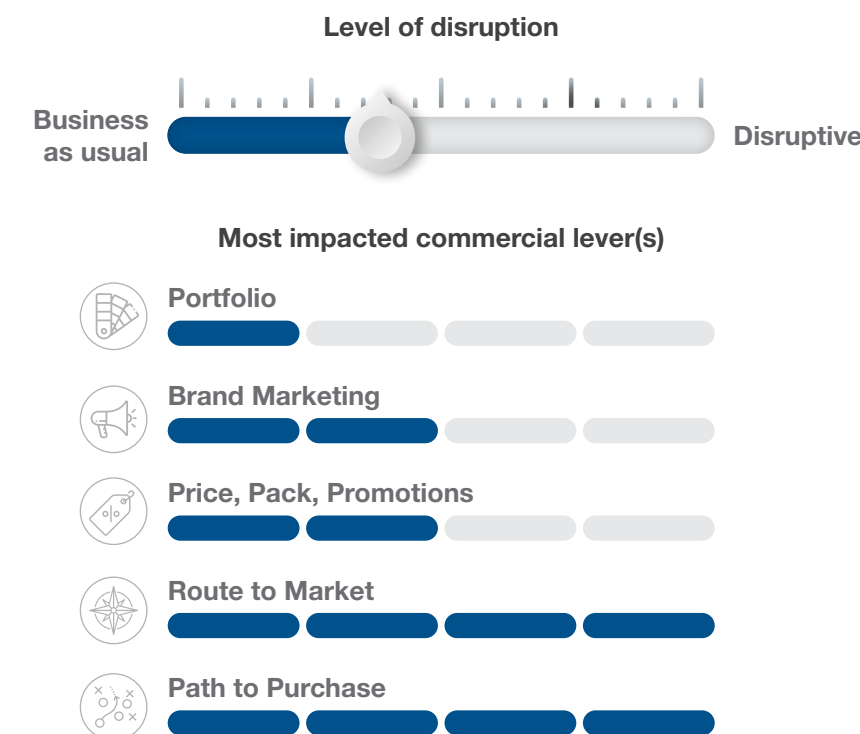
WHAT QUESTIONS DOES THIS POSE?

How can brands **leverage mobile technology** to enhance the purchasing experience?

How can they **integrate multiple channels** for a seamless, experience that drives initial purchases & loyalty?

How far can brands **personalise** before becoming intrusive or overwhelming?

WHAT ARE THE IMPACTS FOR MANUFACTURERS & SUPPLIERS?



SHIFTING CONSUMER BEHAVIOUR

IV. Economic dynamics

Finding paths to true profitable growth:

While inflation is projected to stabilise, the recovery of household disposable income will take longer. As industry growth has largely relied on inflation rather than volume increases, companies need to seek paths to true profitable growth. The changing economic environment calls on them to adapt their strategies to meet evolving consumer behaviour and ensure long-term sustainability.

WHAT IS CHANGING?

Inflation

Inflation in the UK peaked at 11.1% in October 2022 following supply chain disruptions and rising energy prices.¹¹ While forecasts see inflation stabilising at 2% by 2025, consumers are still suffering and will continue to face higher prices. Real household disposable income is not projected to recover to pre-pandemic levels until 2029.¹²

Volume growth

The UK health & beauty industry saw 11% growth in 2023. This was mostly driven by inflation & demand for essential products,¹³ masking drops in volume sales, with consumers seeking discount retailers to manage costs. While they remain cautious, there is a shift to increasing consumption occasions, especially for self-care, wellness and convenience products. Volume growth is projected to achieve a CAGR of 3% from 2023-2028.¹⁴

Spending power & value for money

Economic conditions are expected to steady over the next years, with consumer purchasing power anticipated to rise – creating a positive outlook for discretionary spending.¹⁵ Consumers are likely to again seek value-driven purchases and selective premium products, with more flexibility in spending habits.

WHAT DOES THIS MEAN FOR HEALTH & BEAUTY?

Companies should assess pricing & portfolio strategies to cost increases while remaining attractive to price-sensitive consumers, e.g. offering diverse price points, value packs or product size adjustments. They can explore trade-term options, e.g. volume discounts or flexible payment terms with retailers to offset pressures. **Effective cost management, operational efficiencies and product innovation highlighting value and sustainability** will be key to maintaining loyalty.

Brands should **enhance their value propositions** through product bundling, affordable essentials and targeted promotions that resonate with consumers seeking more frequent and diverse consumption occasions, such as morning skincare, on-the-go essentials and evening wellness rituals. Capturing demand through these tactics, especially in essential categories, will be key to **maintaining resilience in volume sales and foster customer loyalty**.

Brands can prepare for a rise in purchasing power by introducing **higher-value offerings & premium product lines**. Loyalty programs & personalised discounts will remain valuable tools for retaining customers, with premiumisation catering to consumers enjoying growing budgets. Balancing affordability with premium will permit **engaging a broader audience, fostering customer loyalty** across various price points as purchasing power grows.

Economic uncertainty

11.1%
peak inflation in 2022¹¹
– consumers still facing higher prices, with full income recovery: 2029¹²

Projected growth

3% CAGR
between 2023-2028,¹⁴
volume growth of 11% in 2023 mainly from inflation & essentials

Spending habits

consumer purchasing power anticipated to gradually rise, creating a positive outlook for discretionary spending¹⁵

Main Impacts



Price, Pack, Promotions

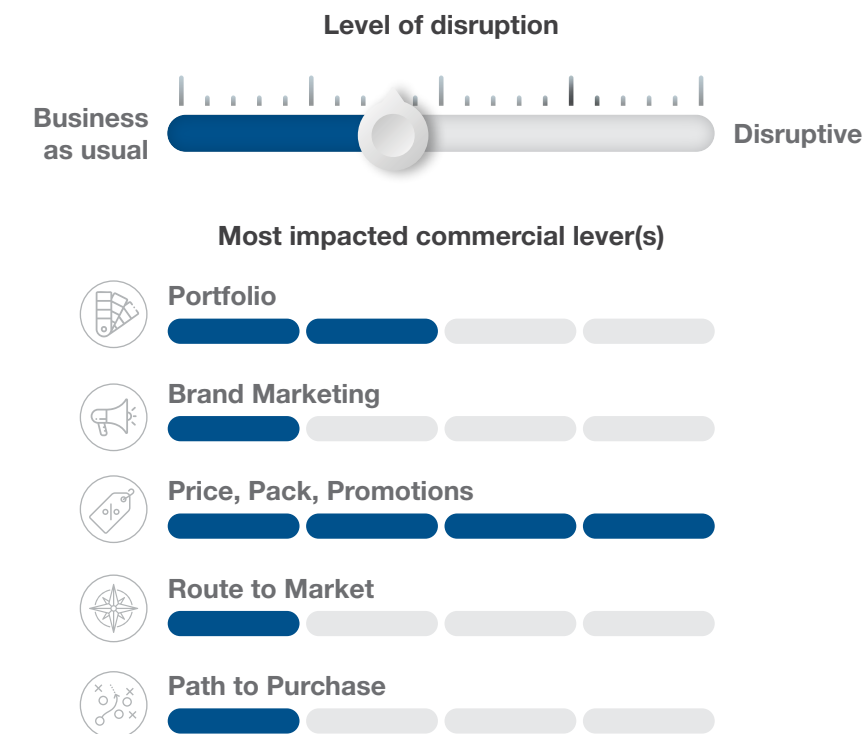
WHAT QUESTIONS DOES THIS POSE?

How do we **balance pricing, portfolio diversification & trade terms** appealing to price-sensitive consumers & protecting margins?

How can we leverage **consumer insights to enhance loyalty** during economic uncertainty?

What strategies exist to **optimise our product mix** and guarantee a robust and **resilient brand**?

WHAT ARE THE IMPACTS FOR MANUFACTURERS & SUPPLIERS?



11. Statista (2025)
12. UK Office for Budget Responsibility (2022)
13. British Beauty Council (2024)

14. GlobalData (2024)
15. UK Parliament (2025)



SHIFTING CONSUMER BEHAVIOUR

V. Changing consumer demands

Aligning values, nature, convenience & more:

Today's consumers seek products that align with their values, balancing ethical concerns and natural ingredients with convenience and personalisation. They desire options that integrate product and service elements, enhancing their experience and meeting evolving demand for holistic care solutions.

WHAT IS CHANGING?

ESG & natural ingredients

Consumers are prioritising brands with environmental & health commitments – 66% of UK shoppers consider a brand's environmental impact before purchasing.¹⁶ Companies like L'Oréal and Unilever have invested heavily in sustainable packaging & carbon-neutrality. Natural cosmetics are projected to grow 6.2% from 2022-2030 globally on concerns about the health impacts of chemicals.¹⁷

Convenience & self-care

Convenience expectations are transforming the health & beauty industry – with ultrafast delivery a major differentiator. The 70% cart abandonment rate in e-commerce is often linked to slow or pricey delivery.¹⁸ A shift to at-home beauty is driving rapid growth in electric cosmetics replicating salon-quality results, meeting convenience needs and desire for accessible self-care routines.

Product-service continuum

With a shift to holistic solutions integrating functionality & experience, products alone may no longer meet consumer expectations. In health & beauty, products such as skincare or wellness devices are being bundled with consultations, tutorials or subscriptions to enhance value propositions, leading brands to explore a balance of tangible product features & additional services for individual needs.

WHAT DOES THIS MEAN FOR HEALTH & BEAUTY?

Sustainability is key across the entire product lifecycle – from ethically sourced ingredients to eco-friendly packaging. Brands must also **expand offerings to include natural, organic and cruelty-free options** – with transparent communication to build customer trust & loyalty. Brands that merge natural ingredients with innovative, high-performance formulations and sustainable practices will be better positioned for growth in the more eco-conscious landscape.

This shift underscores the need to **focus on convenience and accessibility**. Investing in ultrafast delivery capabilities can help capture and retain customers who prioritise quick fulfillment. Brands can meet the demand for at-home, professional-grade beauty solutions by **expanding product lines to include easy-to-use, high-performance tools and devices**. Instructional content and virtual consultations can empower consumers to achieve these results independently.

This evolution suggests the need for a **flexible approach that aligns product offerings with tailored services**. For highly functional products, brands may focus on clear, outcome-oriented messaging, highlighting efficacy and results. For products reliant on ongoing engagement, **brands may add complementary services**, such as virtual consultations or memberships to strengthen relationships and drive loyalty.

Sustainability & health

66% of UK shoppers consider brand's environmental impact before buying, **nature cosmetics** to grow by 6.2% to 2030¹⁷

Focus on convenience

70% cart abandonment rate **due to** slow or expensive **delivery**,¹⁸ with ultrafast delivery a differentiator

Functionality & experience

Holistic solutions in demand integrating product functionality & experience, calling for **bundling & additional services**

Main Impacts



Portfolio & Route to Market

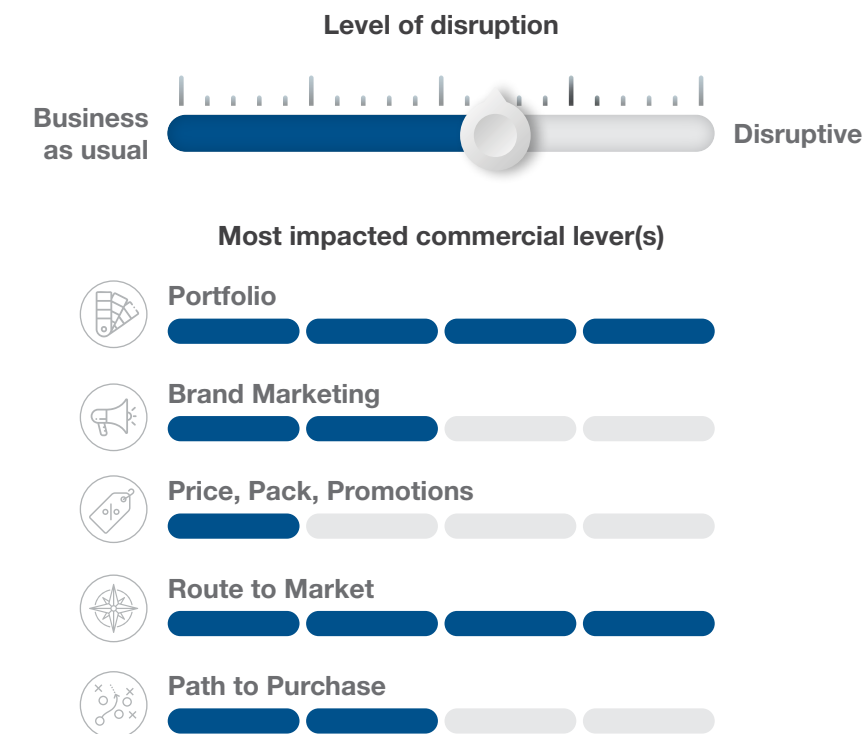
WHAT QUESTIONS DOES THIS POSE?

How can we **align** product ingredients/sourcing **with evolving standards** to meet consumer ESG expectations?

What **convenience-oriented innovations** can we introduce to support consumers' self-care routines?

How do we enhance offerings via **product & service elements**, ensuring relevance among personalised, holistic solutions?

WHAT ARE THE IMPACTS FOR MANUFACTURERS & SUPPLIERS?



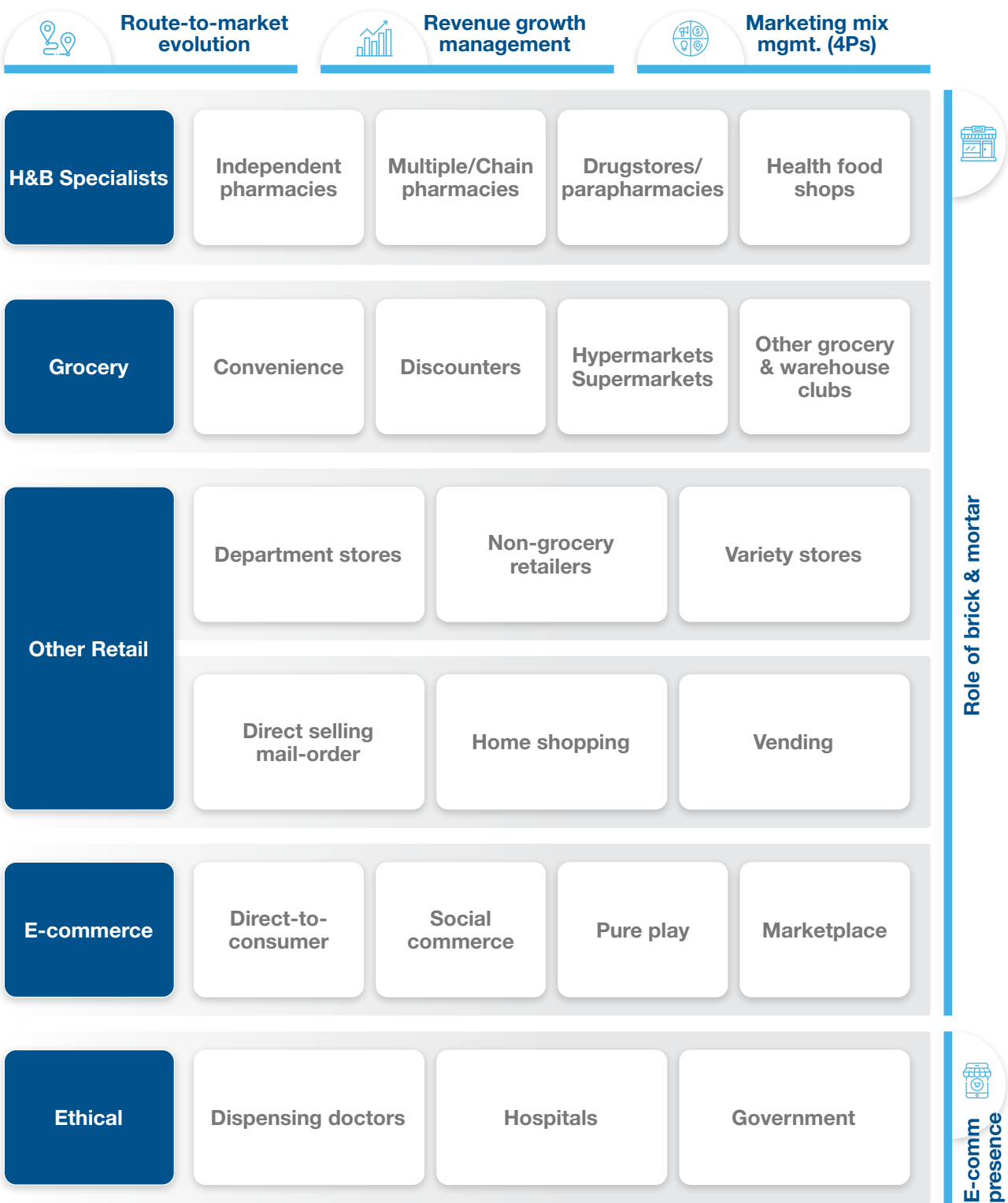
16. Amazon (2024)
17. Statista (2025)
18. Baymard Institute (2025)



2. Changing retail landscape

The physical and online channels comprising the UK retail landscape continue to evolve – as do the ways these can be reached and served. We identify **5 main drivers of which health & beauty companies need to be attentive.**

	I. Role of brick & mortar	<ul style="list-style-type: none">▪ Changing retail experience▪ Omnichannel model▪ Rise of discounters & convenience
	II. E-commerce presence	<ul style="list-style-type: none">▪ Pure players▪ Direct-to-consumer▪ Social media commerce
	III. Route-to-market evolution	<ul style="list-style-type: none">▪ B2B e-commerce▪ Advanced data analytics▪ Intermediaries
	IV. Revenue growth management	<ul style="list-style-type: none">▪ Pricing optimisation▪ Promo effectiveness▪ Portfolio management for growth
	V. Marketing mix (4Ps)	<ul style="list-style-type: none">▪ Influencer collaboration & content marketing▪ Investment in marketing mix





CHANGING RETAIL LANDSCAPE

I. Role of brick & mortar

Compete & connect with value-driven consumers:

Interactions between brick-and-mortar stores & consumers is evolving. Loyalty programs are integrating with retail media to enhance shopping experiences, omnichannel models are personalising engagement & discount retailers are rising. Marketing methods, product offerings & pricing strategies must respond to connect with today's value-driven consumers.

WHAT IS CHANGING?

Changing retail experience

Engaging consumers now relies on in-store experiences centred around loyalty programs & retail media. Tesco's Clubcard is a prime example – leading to a 16% increase in visit frequency and a rise in primary shoppers from 16% to 19% in just a year.¹⁹ Leveraging customer data allows brands to tailor promotions and create a personalised shopping experiences, boosting loyalty & sales.

Omnichannel model

Retailers are using digital tools such as augmented reality (AR) to engage customers with interactive & personalised in-store content, enhanced experiences & conversion. Studies suggest that AR (e.g. Sephora's Virtual Assistant)²⁰ can boost sales conversion by up to 40%. Omnichannel customers are 30% more valuable than single-channel customers, allowing brands to gather valuable data for tailored marketing.²¹

Rise of discounters & convenience

A shift to value & convenience-driven purchasing is leading discount retailers & convenience channels to grow. Brands such as Poundland, B&M, Aldi & Lidl are expanding offerings to attract cost-conscious consumers, with Aldi reporting a 15% YoY increase in health & beauty product sales.²² These retailers are positioned to capture a greater share of shoppers seeking affordable quality options.

WHAT DOES THIS MEAN FOR HEALTH & BEAUTY?

This shift underscores the importance of investing in retail media and loyalty programs to better grasp customer preferences. **Enhancing the in-store experience** through personalised promotions can strengthen consumer connections, while integrating loyalty initiatives with online channels ensures a seamless omnichannel experience. As consumer expectations evolve, brands must **prioritise innovative retail experiences to stand out and cultivate lasting loyalty.**

Omnichannel models demand **tech investments that enhance the in-store experience.** Brands can integrate digital solutions with physical spaces for tailored content that resonates, driving foot traffic and sales. A seamless omnichannel experience allows connection with customers across multiple touchpoints, from online research to in-store purchases. **Close relations with key accounts is important to guarantee the use of space in stores.**

Brands must adapt their pricing, product portfolios and pack sizes to align with consumer needs. This means **understanding buying needs, potentially offering value packs or seasonal stock** specifically for these channels. While there are opportunities for increased sales volumes & penetration, these channels also challenge profit margins & pricing coherency. **Efficient supply chain management** can help maintain profitability while meeting the demand for affordable products.

In-store experience

Actions centred on loyalty programs & retail media **can boost visits by 16%** – as achieved by Tesco's Clubcard¹⁹

Investments in omnichannel

40% boost in sales conversion²⁰ seen **via AR tools** that engage shoppers – leveraging omnichannel

Value & convenience

Aldi saw **15% YOY increase in** health & beauty **products**, underpinning shift to value & convenience-driven purchasing²²

Main Impacts



Price, Pack, Promotions

WHAT QUESTIONS DOES THIS POSE?

How can H&B brands use **loyalty programs & retail media** to engage customers & drive brick-and-mortar sales?

What strategies exist for omnichannel experiences that **satisfy expectations** in online & offline channels?

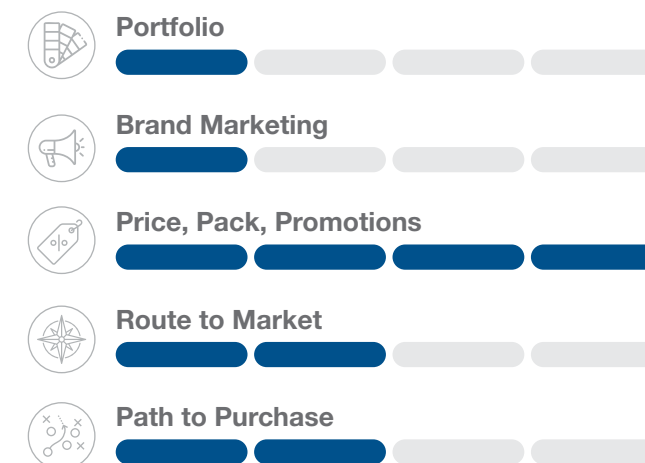
How do brands adjust **pricing/product strategies** to remain competitive yet profitable in a discount landscape?

WHAT ARE THE IMPACTS FOR MANUFACTURERS & SUPPLIERS?

Level of disruption



Most impacted commercial lever(s)



19. Loyalty & Reward Co. (2024)
20. Market.us Scoop (2024)

21. Harvard Business Review (2017)
22. Insider Media (2024)

CHANGING RETAIL LANDSCAPE

II. E-commerce presence

Collaborating via pure players & social media:

With the emergence of pure players and social media commerce in recent years, e-commerce has revolutionised the industry. Brands must navigate this evolving landscape by partnering with pure players, whilst still controlling the brand identity. They must also engage with consumers through social media, building authentic connections to capture consumer attention and build loyalty.

WHAT IS CHANGING?

Pure players

Pure players such as Amazon have gained ground, driving a shift to online purchases via better convenience, product availability and fast delivery. 28% of consumers already purchase health & beauty products online. In Q1 of 2024, online beauty sales were up 11% over 2023, outpacing general online retail growth.²³ Steady growth is expected in the beauty & personal care e-commerce market in the UK, exceeding \$7 billion by 2028.²⁴

Direct-to-consumer

Brands are shifting to direct-to-consumer (DTC) models. With around 50 million e-commerce users in 2024, the UK is Europe's most lucrative e-commerce market – and health & beauty brands are at the forefront.²⁵ DTC enables brands to gain control over pricing, customer experience and brand messaging, bypassing traditional retailers whilst capturing valuable consumer data.

Social media commerce

Social media commerce is growing rapidly, with platforms like Instagram, TikTok & Facebook now key shopping channels. In the UK, this industry is set to double over the next four years, from £7.4 billion to £16 billion by 2028.²⁶ Social media has become an essential touchpoint for reaching younger, highly engaged audiences, and will continue to grow.

WHAT DOES THIS MEAN FOR HEALTH & BEAUTY?

E-commerce is a huge opportunity for expanding reach & accessibility, achieving more appeal via advanced algorithms for product recommendations, personalised deals and subscription options. To leverage the rise of pure players, **brands must adapt with strong SEO, customer reviews and product visibility** – maintaining control over brand identity & customer data whilst navigating pricing pressures. Pure players expect very high service levels from suppliers, with penalties for failure to supply. The impact of prioritising pure players on other key accounts must be considered in the route-to-market strategy.

Succeeding in DTC demands investment in user-friendly e-commerce platforms – emphasizing fast delivery and unique experiences to differentiate from traditional retail. Utilising data from this model can provide insights into purchasing habits, enabling brands to tailor product recommendations and build loyalty. A strong DTC presence also requires a **clear, compelling brand narrative** that resonates with consumers and promotes brand engagement independently of retail intermediaries.

Winning in social media commerce means creating authentic, engaging content that captures attention and fosters trust. Health & beauty brands can use influencers and encourage user-generated content to expand brand reach. **Embedding seamless purchasing experiences within social apps and utilising analytics to tailor recommendations is key.** Providing exclusive products or discounts on social media can help incentivise purchases, turning social followers into loyal customers.

Shift to online

28% of consumers **purchase** H&B products **online**,²³ with e-commerce share set to exceed 7 billion by 2028 in the UK²⁴

Shift to DTC

50 million e-commerce users active in the UK in 2024,²⁵ leading brands to shift to direct-to-consumer models

Influences shopping

Social-media commerce set to grow from **£7 to £16 billion by 2028**,²⁶ becoming a key touchpoint to reach younger audiences

Main Impacts



Route to Market

WHAT QUESTIONS DOES THIS POSE?

How can brands differentiate themselves in a **crowded e-commerce space** dominated by pure players?

How do brands **adapt supply chain & logistics** to meet rising expectations for fast/efficient delivery?

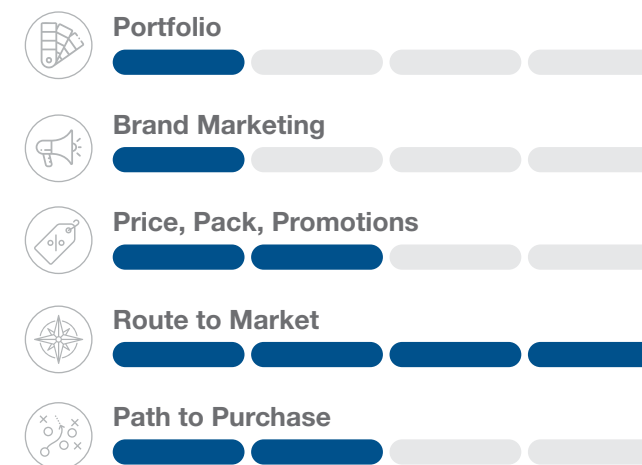
What strategies exist to effectively **leverage DTC and social media commerce** for consumer engagement?

WHAT ARE THE IMPACTS FOR MANUFACTURERS & SUPPLIERS?

Level of disruption



Most impacted commercial lever(s)



23. Global Freight Solutions (2025)
24. Statista (2024)

25. Statista (2024)
26. Retail Technology Innovation Hub (2024)



CHANGING RETAIL LANDSCAPE

III. Route-to-market evolution

Navigating intermediaries, eB2B & data:

The way companies deal with route-to-market is evolving. One of the most significant trends is a move away from intermediaries as these grow in strength via significant M&A activity of key distributors, along with the rise of eB2B. Advanced data analytics are offering opportunities for improvement across various business areas as well as ROIs.

WHAT IS CHANGING?

B2B e-commerce

Platforms for B2B e-commerce and traditional wholesalers are reshaping how customers source products – offering efficiency, better pricing and access to a global supplier network, making them essential tools for brands. Research suggests that procurement areas have set ambitious digitalisation objectives, with an average target of 70% digital procurement by 2027.²⁷

Advanced data analytics

This resource is reshaping route-to-market (RTM) strategies, with tangible benefits. Predictive analytics are delivering 10-20% improvements in forecast accuracy,²⁸ and a 49% increase in marketing campaign conversion rates – underlining the effectiveness of targeted strategies based on consumer insights.²⁹

Intermediaries

The use of intermediaries such as wholesalers & distributors is evolving. Consolidation in the wholesale industry (e.g. the Bestway & CostCutter merger) is leading to larger networks and more buying power. Brands are moving away from traditional intermediaries, exploring direct-to-consumer (DTC), direct models or partnerships to maintain influence on margins and customer experience.

WHAT DOES THIS MEAN FOR HEALTH & BEAUTY?

The rise of eB2B suggests a need to adapt to a digital-first supply chain strategy. Brands should **ensure products are easily accessible on eB2B platforms, whilst also leveraging data analytics** to optimise inventory management, pricing and demand forecasting. This will allow them to reach a wider network of retailers, streamline operations and offer tailored product assortments – improving speed to market and reducing distribution inefficiencies.

Adopting advanced data analytics tools will be key to gaining efficiency and unlocking growth. Data analytics can improve demand forecasting and reduce stockouts, delays and excess inventory. **Targeted marketing based on purchasing behaviour and preferences** can enhance marketing investment ROI. For operations, brands can adjust pricing strategies in real time based on consumer behaviour and market conditions, maximising competitiveness.

DTC or direct models allows brands to **retain control, via closer relationships** with consumers & customers – protecting margins and brand messaging, directly managing customer relationships and gathering consumer data firsthand. Offering broad retail access and efficient supplies, collaboration with wholesalers rests on stronger relationships & strategic alignment. Brands need to consider their **distribution strategy and if a DTC model better suits their business strategy** – as wholesalers can demand flexibility in pricing, promotions & offerings.

B2B platforms

70% target for digitalisation

set by procurement areas, driven by rise of B2B e-comm platforms²⁷

Prediction & optimisation

10-20% improvements

in forecast accuracy being achieved,²⁸ with **49% increase** in marketing campaigns²⁹

Intermediary landscape

Consolidation in wholesale industry forming large intermediary networks with **more buying power**

Main Impacts



Route to Market

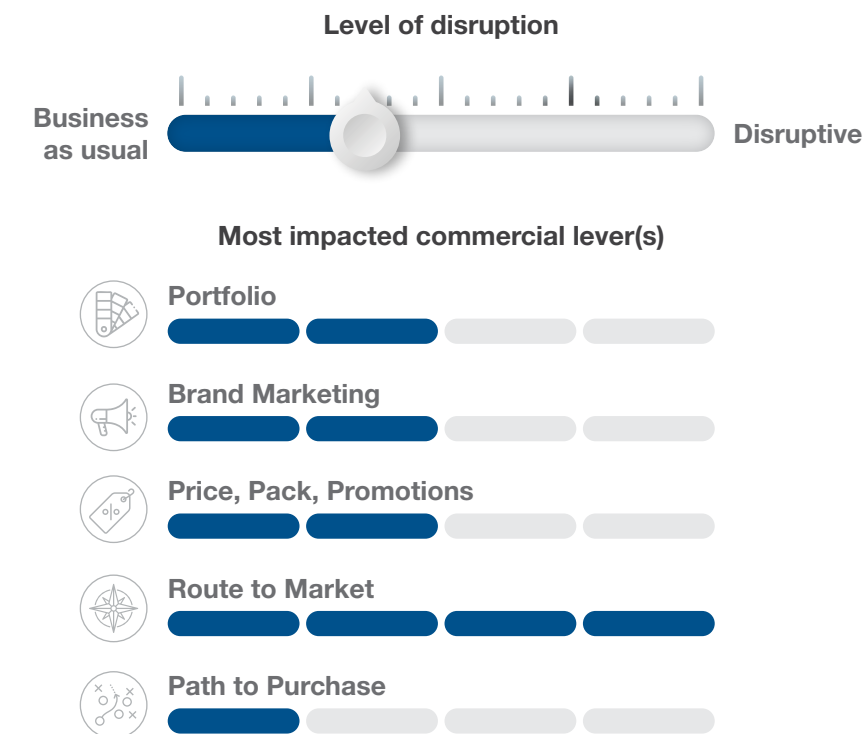
WHAT QUESTIONS DOES THIS POSE?

What paths can **maximise partnerships with eB2B platforms**, ensuring enough influence over brand identity?

How do brands **integrate advanced data analytics** in practice to boost efficiency & meet consumer demands?

Which strategies are suited for **balancing consolidated intermediaries vs. DTC/ direct retailer** partnerships?

WHAT ARE THE IMPACTS FOR MANUFACTURERS & SUPPLIERS?



27. Procurement Magazine (2024)

28. TechFunnel (2024)

29. Patni Family Office (2024)

CHANGING RETAIL LANDSCAPE

IV. Revenue growth mgmt.

A category-centric view for value creation:

Effectively managing revenue growth is vital for health & beauty brands – taking a category-centric view to drive value creation. This is being enhanced via data-driven decisions for pricing optimisation, promotion effectiveness and portfolio management. A stronger focus on applying revenue growth management strategies enables brands to maximise profitability and drive sustainable growth.

WHAT IS CHANGING?

Pricing optimisation

Traditional fixed pricing approaches are being replaced by agile strategies that adjust prices in real time based on demand fluctuations, competitor pricing and market trends. Suppliers will need to prepare for a more competitive and dynamic pricing environment.

Promo effectiveness

Revenue growth management (RGM) in promotions is evolving, with brands focused on better ROI via data-driven strategies. These enable real-time tracking of promotional effectiveness, allowing for adjustments based on sales data & consumer behaviour. With 35% of beauty shoppers willing to switch brands for a special offer, optimising promo ROI is essential.³⁰

Portfolio management for growth

Advanced data analytics allow brands to evaluate profitability & market performance to optimise their portfolio – with 10% margin & cost improvements achieved by one major beauty brand's portfolio-performance program.³¹ The NPD landscape and competing on packs/formats will increase as more suppliers adopt these techniques.

WHAT DOES THIS MEAN FOR HEALTH & BEAUTY?

This shift towards dynamic pricing requires more responsiveness to market changes & consumer preferences. **Understanding how pricing affects consumer behaviour** through data can help develop targeted strategies to enhance loyalty & sales. Fine-tuned pricing strategies improve profitability by minimising discounting and maximising perceived value. Effectively implementing this can a better position brands to navigate competitive pressures and adapt to a fast-paced market.

Brands are relying more on data to **ensure promotional activities are targeted and yield measurable returns**. Analytics are becoming essential to understanding which offers resonate most with customers and balancing short-term sales boosts with long-term profitability. The shift is encouraging brands to optimise the timing and frequency of promotions to avoid discount fatigue whilst maximising engagement. **RGM approaches** can boost revenue growth and customer loyalty, making promotions a more effective tool in the overall growth strategy.

A **well-managed portfolio using data** for informed decisions on product development, pricing and market positioning allows for **quick responses to shifts in consumer preferences and market trends**. This ensures a balanced mix of products driving both revenue and profitability. By focusing on the most profitable segments and eliminating underperforming products, brands can **allocate resources more effectively and foster growth**.

On-demand requirements

Agile strategies replacing fixed pricing approaches, resulting in a **more competitive pricing landscape**

Focus on ROI

40% of beauty product **users will switch brands** for special offers,³⁰ making promo-ROI optimisation key

Portfolio optimisation

10% improvements in margins & costs being achieved by portfolio-performance programs using advanced data analytics³¹

Main Impacts



Portfolio & Price, Pack, Promotions

WHAT QUESTIONS DOES THIS POSE?

How can data analytics be leveraged to inform **pricing strategies** & respond to **market fluctuations**?

What metrics should brands prioritise to evaluate the effectiveness and ROI of their promotional activities?

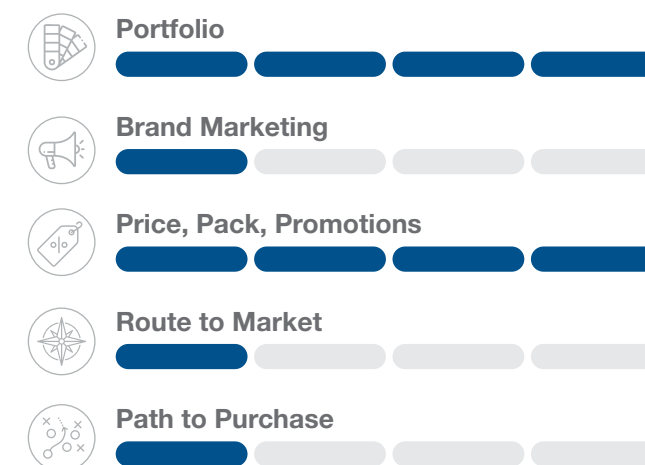
How can brands optimise their product portfolios to **meet changing consumer preferences**?

WHAT ARE THE IMPACTS FOR MANUFACTURERS & SUPPLIERS?

Level of disruption



Most impacted commercial lever(s)



30. The Nielsen Company (2013)
31. Integration Consulting (2024)



CHANGING RETAIL LANDSCAPE

V. Marketing mix (4Ps)

Shaping strategies to meet consumer needs:

Centred on the 4Ps of product, price, place and promotion, marketing mix management plays a crucial role in shaping brand strategies to meet consumer needs and drive growth. By effectively balancing these elements, brands can enhance their market presence and adapt to an evolving consumer landscape.

WHAT IS CHANGING?

Influencer collaboration & content marketing

Social media influencers are an avenue for brand engagement, with 49% of consumers using their recommendations for purchasing decisions.³² Brands are investing in long-term partnerships with influencers, leading to higher engagement rates. 62% cheaper than traditional marketing, content marketing is gaining space in brand strategies, yielding 3x more leads.³³ Point-of-purchase influencers still remain relevant – such as the expertise & credibility of pharmacists guiding consumer decisions, especially for wellness & skincare products.

Investment in marketing mix

This approach is shifting as brands seek to spread spending across multiple channels. There is growing recognition that digital platforms, particularly social media, deliver higher engagement rates. Retail media is emerging as a key player, offering targeted advertising directly at the point of purchase. Brands are increasingly allocating budgets to a more balanced mix that includes retail media, digital advertising, influencer partnerships and traditional media.

WHAT DOES THIS MEAN FOR HEALTH & BEAUTY?

Brands must master influencer partnerships in their brand marketing strategies, such as by working with social media influencers aligned with brand values & target audiences to foster authentic connection and build trust among customers. **By utilising diverse platforms, brands can reach diverse audiences and benefit from the influencer's ability to make products relatable and relevant.** Micro-influencers, with smaller but highly engaged followings, allow brands to reach niche segments with tailored messaging. Engagement with pharmacists via in-store promotions, educational campaigns or by offering expert-led content offers an avenue for educating consumers on product benefits, particularly in health & wellness.

Changes in consumer preferences highlight the necessity of strategically optimising the 4Ps of marketing to maximise impact. Brands must carefully consider their product offerings to ensure alignment with consumer demands, whilst also developing appropriate price architecture and pricing strategies that reflect value and competitiveness. Understanding the best places to reach their target audience – through digital platforms, retail partnerships, or physical locations – is crucial. Leveraging diverse promotional strategies can further enhance brand visibility and customer engagement. A diverse mix can lead to a 20-30% increase in overall ROI, with each channel having different impacts on sales and brand awareness.³⁴

Influencer partnerships

49% of consumers rely on social media influencers for shopping recommendations & decisions³²

The 4Ps of marketing

Social media generating higher engagement rates, leading brands to spread marketing **investments across multiple channels**

Main Impacts



Brand Marketing & Price, Pack, Promotions

WHAT QUESTIONS DOES THIS POSE?

How can brands **align product offerings to evolving preferences**, keeping prices competitive?

What strategies **optimise promotional efforts** across digital & traditional channels for maximum engagement?

How can **distribution strategies be enhanced** to ensure products reach target consumers on multiple platforms?

WHAT ARE THE IMPACTS FOR MANUFACTURERS & SUPPLIERS?



32. Patni Family Office (2024)
33. Penfriend.ai (2024)
34. The Nielsen Company (2022)



3. Growth enablers

Three enabler trends have become foundational for driving growth in the health & beauty industry. To succeed, brands must understand how these work and keep up to date on how they evolve.



I. Tech, artificial intelligence & data

- Commercial effectiveness
- Data availability & insights
- Cost efficiency



II. People & leadership

- Culture & flexible working
- Future leaders
- Non-linear careers



III. Operational excellence

- Customer management
- Demand planning
- Integrated marketing, shopper activation & sales planning



GROWTH ENABLERS

I. Tech, artificial intelligence & data

Embracing a potent new ally for growth:

The value-add and affordability of commercial technologies, data, and artificial intelligence are rapidly improving over time, providing health & beauty brands with a potent new ally for growth.

WHAT IS CHANGING?

Commercial effectiveness

Advances in technology & AI are transforming commercial effectiveness. Tools such as AI-driven next-best order suggestions & promotion-ROI analysis are now more sophisticated, with deeper insights and more accurate recommendations. Dynamic forecasting capabilities are enhancing S&OP processes, for quicker responses to market & demand changes.

Data availability & insights

Data availability is rapidly expanding due to 1) increased access to paid customer & consumer data, with valuable insights into behaviour & preferences, and 2) synthetic data offering opportunities to better grasp consumer needs & drivers – for more informed decisions and better targeting & personalisation efforts.

Cost efficiency

Advancements in technology, particularly AI, are enabling new approaches to improve cost efficiency in go-to-market strategies. Tools like dynamic routing for deliveries and field sales teams offer more precise guidance on how to serve customers efficiently, helping brands optimise resources and reduce operational costs whilst maintaining effective coverage.

WHAT DOES THIS MEAN FOR HEALTH & BEAUTY?

The increasing availability of advanced, cost-effective technologies allows health & beauty brands to enhance account management and field sales efforts, leading to higher customer value and growth. Brands can **identify new opportunities and maximise existing customer potential with greater precision**. More advanced forecasting tools help improve product availability and ensure consistent on-shelf availability.

With the **increasing availability of data at lower costs**, health & beauty companies can adopt a more structured approach to data management. By **connecting previously siloed data sources**, this provides a comprehensive view of business performance, uncovering insights that help improve marketing strategies, enhance sales efforts and drive overall growth.

With the integration of technologies, brands can gain **deeper insights into their cost structures, pinpointing inefficiencies and making more informed decisions**. AI-driven tools streamline resource allocation, reducing unnecessary expenditures in areas such as delivery routes or sales team deployment – boosting margins and freeing up resources to reinvest into higher value-add areas such as customer engagement, product innovation or personalised marketing strategies.

Technology & sales

Tech & AI advances transforming commercial effectiveness with deeper insights & accuracy

Data-driven growth

Personalisation & decisions being supported by expanding access to paid & synthetic data

AI & tech-enabled tools

Resource optimisation in go-to-market models being driven by AI & tech-enabled tools such as dynamic routing in delivery/sales

Main Impacts



Route to Market

WHAT QUESTIONS DOES THIS POSE?

What **cost-effective technologies** can brands deploy to improve growth?

How do brands best **manage data to capture value**?

How can brands **adjust routes-to-market & paths-to-purchase** via insights provided by tech and data?

WHAT ARE THE IMPACTS FOR MANUFACTURERS & SUPPLIERS?



GROWTH ENABLERS

II. People & leadership

Adapting to new priorities:

New expectations around flexibility, mental health and diversity are challenging organisations to respond. Shifting career paths and a new generation of leaders prioritising autonomy, inclusivity and well-being demands more supportive, adaptive cultures to attract and retain talent.

WHAT IS CHANGING?

Culture & flexible working

The UK workforce is adapting to flexible work structures, with 44% working from home at least part time.³⁵ A strong preference for flexibility remains, with 78% of remote workers reporting a better work-life balance.³⁶ Along with the gig economy, we see a shift to more versatile & adaptable arrangements, as businesses look to meet evolving staff needs & expectations.

Future leaders

The next generation of leaders hold unique values & expectations, focusing on flexibility & purpose in their career choices. While financial compensation remains important, 60% of Gen Z favour workplace flexibility over increased pay – compared to just 35% of Boomers.³⁷ This group is often highly entrepreneurial, seeking roles with autonomy, authority & creative license, as well as organisations prioritising diversity & inclusion.

Non-linear careers

Career paths are becoming less linear, with movement between roles, industries & sectors across professional journeys prioritising skill development, personal growth & fulfillment. Gen Z & Millennials value variety and seek to explore different skill sets & industries. This shift also reflects greater acceptance of flexible & gig work, as workers prefer adaptable careers over committing long-term to a single role or industry.

WHAT DOES THIS MEAN FOR HEALTH & BEAUTY?

Adapting means **building a culture that supports flexibility, fosters connection and prioritises well-being**. Hybrid & remote work require brands to strengthen communication and team collaboration for cohesion. Supporting mental health via wellness programs such as counseling, wellness apps or dedicated ‘well-being days’ have been shown to empower employees in effectively managing stress, positively impacting job satisfaction & productivity. **Organisations should seek a balanced approach** to create an adaptable, resilient workforce.

Attracting and retaining talent calls on brands to **cultivate an empowering, inclusive environment that values flexibility & innovation**. Roles must incorporate creative freedom & decision-making power, with opportunities for staff to lead projects and innovate. Mentorship programs, flexible work structures & initiatives for employees to embrace their identities can foster a culture of greater alignment with the brand values. Engaging these generations as such will help in **smooth and impactful leadership transitions**.

Brands need to adapt by **creating environments where skills are transferable, career paths flexible and opportunities available for cross-functional/cross-industry learning**. Rotational programs, professional development & upskilling can help retain talent seeking growth & variety – aiding in talent retention while bringing fresh perspectives to the business. Demonstrating hiring flexibility & inclusivity can attract staff with non-linear careers, recognising diverse experiences as strengths for innovation & adaptability.

Flexible working

44% of UK staff work from home at least part time,³⁵ with **78%** citing better work-life balance³⁶

Talent retention

60% of Gen Z favour flexibility to increased pay vs. just **35%** of boomers³⁷

Career path

Diverse professional journeys prioritising skill development, personal growth & fulfillment a strong preference among Gen Z

Main Impacts



Brand Marketing

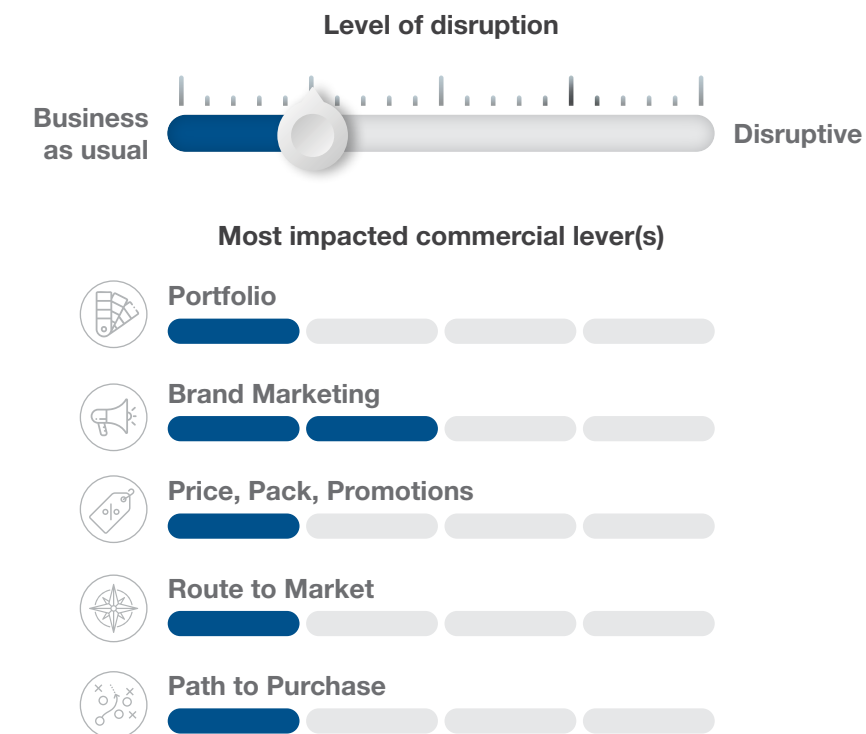
WHAT QUESTIONS DOES THIS POSE?

How do we **foster a culture** that supports hybrid working, mental health & wellness to **satisfy & retain talent**?

What leadership development strategies can **attract & empower new leaders**?

How do we leverage the benefits of ‘squiggly careers’ for a **workforce with diverse skills & experiences**?

WHAT ARE THE IMPACTS FOR MANUFACTURERS & SUPPLIERS?



35. Axa (2024)

36. RIE Solutions (2024)

37. Nomadic Business Review (2024)

GROWTH ENABLERS

III. Operational excellence

Smarter, more integrated operations:

With brands across the sector embracing technology to enhance all aspects of their operations, process excellence has taken centre stage. In addition to investing in processes such as customer management and demand planning, brands must also continuously seek improvements to adapt to a changing marketing, shopper activation and sales planning landscape.

WHAT IS CHANGING?

Customer management

Brands are seeing a shift from traditional, transactional relationships to more data-driven strategies with retail partners that enhance collaboration and efficiency. Retailers expect real-time insights and personalised support from brands, enabling them to respond to fluctuating market demands and consumer behaviour.

Demand planning

Demand planning is being revolutionised by data analytics & advanced forecasting. Brands are shifting from traditional, static techniques to dynamic, data-driven approaches with real-time sales data, market trends and consumer behaviour – fueled by sophisticated demand-planning software based on machine learning algorithms.

Integrated marketing, shopper activation & sales planning

The marketing, shopper activation & sales planning landscape is evolving as brands move toward a more cohesive, data-centric approach. Marketing, sales & customer insights are increasingly being integrated for seamless consumer experiences, harnessing advanced real-time data analytics. Adopting omnichannel platforms allows them to use data across channels for a comprehensive view of the customer journey.

WHAT DOES THIS MEAN FOR HEALTH & BEAUTY?

Stronger partnerships that foster loyalty and drive growth jointly are needed. Brands are investing in automation to provide retail partners efficient support, AI-driven CRM systems and predictive analytics tools for insights into retailer behaviour – enabling them to create tailored promotions, optimise stock and develop strategies aligned with retailer-specific needs. This allows them to foster collaborative relationships, driving mutual growth and a seamless supply chain experience.

Investing in advanced demand planning technologies is key – for analysing historical sales data, seasonal trends & market signals for more accurate forecasts. Demand planning integrated with supply chain management systems offers better foresight for demand fluctuations, optimised inventory levels and reduced stockouts/excess inventory. This allows brands to **align inventories to actual consumer demand, enhance operational efficiency and ultimately drive profitability while improving customer satisfaction.**

A unified approach between marketing & sales teams, facilitated by collaborative tech investments, such as integrated CRM systems or data analytics platforms, can drive sales and build customer loyalty. Advanced analytics & real-time data enable targeted & relevant campaigns, engaging consumers at every touchpoint. **Integrating digital tools allows for seamless coordination between marketing teams and sales operations,** ensuring that messaging and promotions align with sales efforts whilst optimising inventory management.

Partnerships & data

Data-driven strategies with retail partners more responsive to fluctuating markets & consumer behaviour

Dynamic responses

Real-time sales data market trends & consumer behaviour are revolutionising responsiveness

A unified approach

Cohesive, data-centric approaches being adopted, integrating marketing, sales & consumer insights into seamless experience

Main Impacts



Price, Pack, Promotions; Route to Market & Path to Purchase

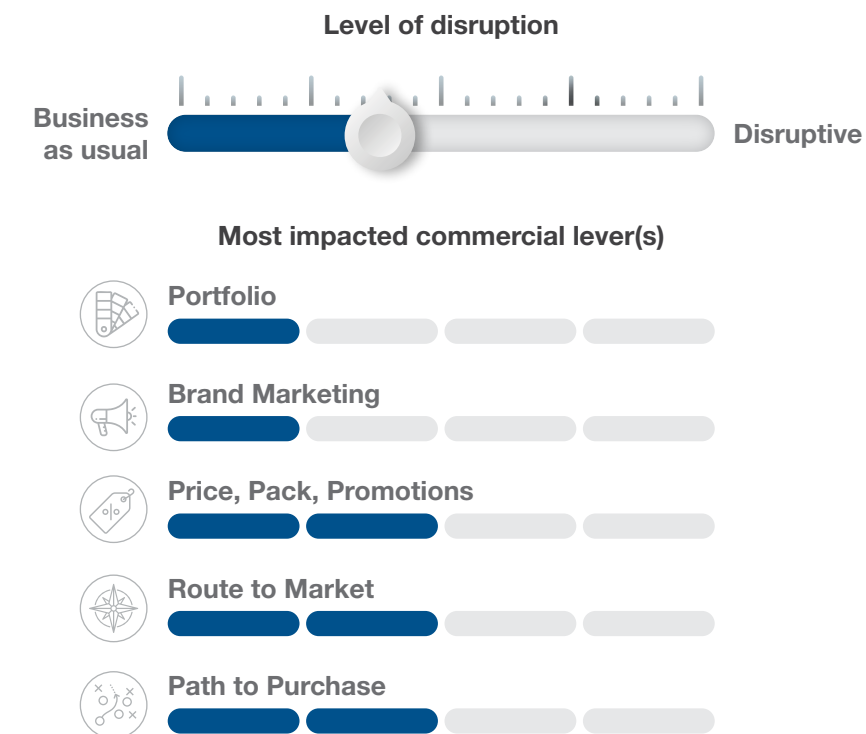
WHAT QUESTIONS DOES THIS POSE?

How can brands **leverage advanced data analytics & tech** to enhance customer management & demand planning?

What's needed to **integrate customer insights** in demand planning, to anticipate market trends & consumer needs?

How can brands **continuously measure & improve** process excellence initiatives to drive growth & profitability?

WHAT ARE THE IMPACTS FOR MANUFACTURERS & SUPPLIERS?



Final Takeaways to 2030

As we look toward 2030, the H&BA Strategic Roadmap provides a guide to navigating the dynamic and evolving health and beauty industry. The insights presented in this report underscore the need for agility, foresight and collaborative innovation. **Three takeaways are pivotal for sustained growth and relevance:**



1

Consumer-centric adaptability:

The industry’s future lies in its ability to adapt to shifting consumer behaviours. With demographic changes, increasingly informed shoppers and evolving paths-to-purchase, companies must prioritise personalisation, convenience and ethical transparency. Understanding and responding to these will differentiate market leaders from followers, ensuring meaningful engagement and loyalty in a competitive landscape.



2

Omnichannel excellence:

The retail environment is transforming, with brick-and-mortar stores, e-commerce platforms and direct-to-consumer models becoming deeply interconnected. Success depends on delivering seamless, omnichannel experiences that meet consumers where they are - offering value, innovation and accessibility while maintaining brand integrity and operational efficiency. Brands that optimise these pathways will not only capture sales but build lasting relationships.



3

Growth Through Innovation and Leadership:

The most resilient and forward-thinking brands will leverage technology, data analytics and AI to drive commercial effectiveness and cost efficiency. At the same time, cultivating a dynamic, inclusive and purpose-driven organisational culture will be essential to attract and retain the next generation of talent. This alignment of people, processes and technology will create a foundation for sustainable innovation and category leadership.

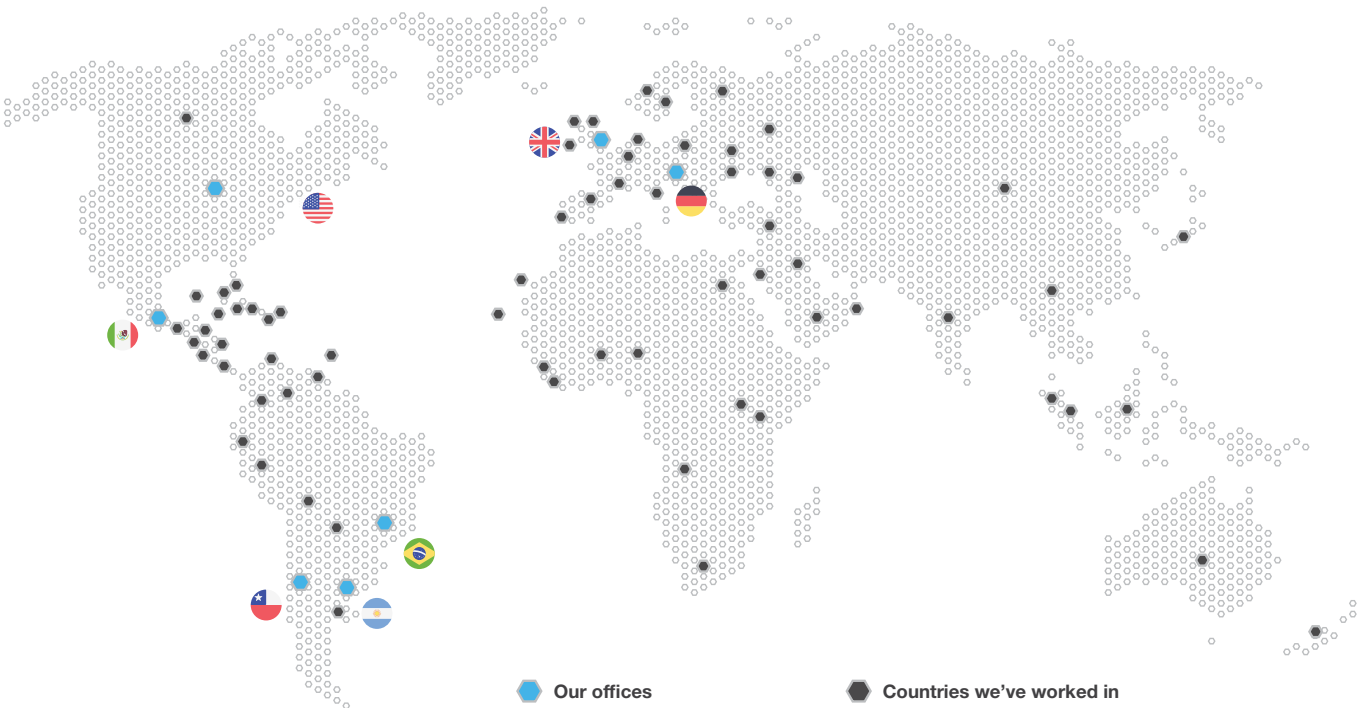
As the UK health and beauty sector enters this exciting period of transformation, those who anticipate change, embrace innovation and invest in building meaningful connections with consumers and partners will not only thrive but define the industry’s future. The H&BA remains committed to guiding and supporting this journey, fostering collective success for all members.

*Recognising the increasing relevance of AI within our industry, we thought it fitting to collaborate with an AI tool to help craft this final summary.

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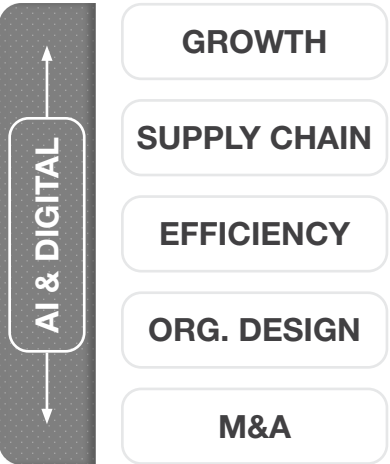
clients served
900+

projects delivered
3600+

countries worked in
85+

repurchase rate
87%

What we offer



How we offer it

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We believe in strategies that can be implemented

WE’RE PARTNERS IN YOUR TRANSFORMATION

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