

United States Personal Care Packaging Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The United States Personal Care Packaging Market is expected to register a CAGR of 3.3% during the period of 2022-2027. The United States is one of the largest markets when it comes to cosmetics, personal care products, and fragrances market. In 2020, L'Oreal's global consolidated sales from North America generated about EUR 6.9 billion, as compared to EUR 4.4 billion in 2011, only next to the Asia-Pacific region. The United States accounts for a significant percentage of the North American cosmetics share.

Key Highlights

The United States cosmetics market is experiencing growing demand for premiumization, in line with the global trend. This, in turn, is driving the demand for innovative and premium packaging. For instance, Estee Lauder, in the recent past, launched the Bobbi Brown Art Stick Liquid Lip in a new color cosmetic container that offers convenience in the way liquid lipstick is applied. This overall premiumization is driving upscale packaging in glass and specialty cosmetic containers.

The United States is also experiencing an increased use of e-commerce channels for the procurement of personal care products by consumers. While the share of online sales remains low, it is expected to grow during the forecast period. Furthermore, Unilever has been making new acquisitions in order to expand into selling products through online channels.

A significant share of the product cost is its packaging, and in some markets, it can be as high as 15% of the cost of the product in the package and can even go higher if not managed, according to the Operational Excellency Society. The significantly high cost of creating new designs in packaging might pose a challenge to the fluid growth of the studied market in the United States.

The personal care product packaging market in the country is seeing a significant slump in demand due to global outbreaks, restricting personal contacts, gathering, travel, and the closure of the hospitality industry are all influencing the personal care and hygiene market. The global pandemic triggered a crisis of supply due to the widespread closure of points of sale, which led to an unprecedented, if temporary, decline in the market. Although certain categories like the demand for soaps and sanitizers are

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observing a significant growth in need during the pandemic and cosmetic vendors are increasingly marketing their products with inner well-being tags supporting the growth of the market during the pandemic.

US Personal Care Packaging Market Trends

Plastic Material is expected to witness significant growth

Plastic is a prominent material in personal care product packaging due to its low cost, lightweight, flexibility, durability, and other factors. For personal care products, plastics are a material of choice for manufacturing shatterproof and "no-spill" bottles, jars, tubes, caps, and closures.

According to the Packaging Machinery Manufacturers Institute (PMMI), at 61% market share, plastic packaging, such as bottles, jars, compacts, and tubes, dominate in beauty and other personal care products, where bottles are the most commonly used containers, accounting for 30% of the market.

Personal care product bottles produced from HDPE are the most common and least expensive, which are economical, impact-resistant, and maintain a good moisture barrier. Lotion bottles come in all different shapes, sizes, and forms, where some lotions are kept in capped tubes. These tubes are usually made from plastic, depending on their size. However, there are lotion bottles that are also made of plastic, but instead of the capped tops, they have the pump dispensers. This is helpful for many people who do not want to have to screw a top on and off, or not want to flip up a cap.

Moreover, another common type of plastic used for personal care product containers is PP plastics. These can also come in a more affordable PET plastic or a higher-end acrylic plastic. Acrylic plastic is usually clear and resembles glass. This type of material has an advantage over the glass as it is not prone to breakage. However, PP plastic is more affordable than acrylic and usually comes in round or tube-like shaped plastic containers.

PP plastic containers can be molded into heart shapes, character shapes, or square shapes, to suit the style or marketing of the personal care product to be distributed. Jars and pots are majorly used for face creams, lotions, foundations, lip balms, powders, and other products, where the size ranges from 20mm to 60mm and can hold anywhere from 25ml (or less) to 250ml.

As manufacturers are seeking options to reduce the amount of material used per product, plastics deliver exceptional gains in terms of the provision of lightweight packaging solutions that use fewer materials. Moreover, over the last decade, plastic's environmental impacts have resulted in a slowdown in the segment. However, the availability of recycled plastics and innovations in material technology have enabled the development of environment-friendly packaging solutions in the United States.

Hair Care Segment holds significant market share

Hair care brands use packaging to their advantage, both in the salon and beyond. Haircare for the retail segment is highly competitive, and hair care brands are relying on packaging differentiation to forge a connection with consumers.

Most of the haircare brands experiment with the interplay of matte and gloss printing techniques and are increasingly incorporating sensory elements into their packaging. The use of treatment oils for added heat styling protection, imparting shine, or decreasing frizz has led to the increased use of dropper packaging as a dosing and precision application method.

Oribe Hair Care, based in New York, recently cultivated a distinctive shelf presence with its angularly-lined, boldly-hued, custom packaging since its inception. The brand also has innovative packaging, which blends old world intricacy with sleekly modern engineered elegance, and all the bottles, upright tubes, and sophisticated jars deliver a cohesive display suggestive of perfume bottle silhouettes.

Companies dedicated to the development of shampoos and haircare products have also been looking to expand into retail stores to maximize any possible revenue. For instance, in November 2021, Olaplex Holdings Inc., a US based company, formed a

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distribution partnership with Ulta Beauty Salons, designed around increasing retail channels for their products by using the salons as stores. The company's retail products will be available in more than 1,250 Ulta stores' and on ulta.com from January 2022. Many hair care brands are entering partnerships to provide better packaging alternatives. Companies are increasingly engaging in refilling initiatives that encourage consumers to bring back their bottles and refill them at a subsidized price instead of purchasing the product independently. In October 2020, P&G Beauty, headquartered in the United States, announced its first-ever refillable aluminum bottle system to launch at-scale, with its Head & Shoulders, Pantene, Herbal Essences, and Aussie brands in Europe. The refill system uses a new reusable 100% aluminum bottle and recyclable refill pouch, made using 60% less plastic (per mL versus standard brand bottle). It is expected to pave the way in changing the way consumers buy, use and dispose of their shampoo bottles.

Sustainable packaging is further driving the hair care packaging vendors to innovate their solutions, even though the demand for plastic bottles and dispensers hold dominance in the market a significant share of innovation is on the material side. For instance, Dove as a brand is looking to move toward 100% recycled plastic bottle for its certain types of colour-vignetted bottles for its Hair range in the country, amongst other regions.

US Personal Care Packaging Market Competitor Analysis

The US Personal Care Packaging Market is moderately fragmented due to the presence of players, like AptarGroup Inc., RPC Group Plc (Berry Global Group), Silgan Holdings Inc., amongst several others. The players can be noted to expand into the studied market with substantial R&D investments, driving towards the sustainability and digitization of the packaging industry in the country. An aging population, pollution, and new product innovations are some of the factors encouraging the players to introduce new products and programs focused on sustainability, impacting the personal care packaging market in the country positively.

July 2021 - Plastic parts and packaging maker Westfall Technik acquired Carolina Precision Plastics, which gives Westfall access to prominent cosmetics and personal care companies, including L'Oreal, Estee Lauder, and Clorox (which owns Burt's Bees). The acquisition marks the company's expansion into the US markets.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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