

PERSONAL CARE

PERSONAL CARE TOP 20:

Brand Value (US\$M)

| | |
|------------------|----------|
| L'ORÉAL PARIS | \$36,854 |
| COLGATE | \$18,024 |
| PAMPERS | \$16,817 |
| LANCÔME | \$15,124 |
| GILLETTE | \$14,335 |
| GARNIER | \$9,981 |
| DOVE | \$7,639 |
| MAYBELLINE | \$5,907 |
| NIVEA | \$5,764 |
| PANTENE PRO-V | \$5,282 |
| ORAL-B | \$4,657 |
| ESTÉE LAUDER | \$4,607 |
| HUGGIES | \$4,504 |
| LA ROCHE-POSAY | \$4,412 |
| HEAD & SHOULDERS | \$4,254 |
| OLAY | \$4,051 |
| SENSODYNE | \$3,693 |
| CREST | \$3,644 |
| CERAVE | \$3,353 |
| CLINIQUE | \$2,948 |

DEFINITION:

The Personal Care category includes brands in health and wellness, beauty and facial, makeup, skin, hair, baby, and oral care.

REAL RESULTS/ TOP PERSONAL CARE BRANDS SEE ROUTES TO GROWTH

Category Brand Value
Year-on-Year Change*

-4%

Personal Care Top 20
Total Brand Value

\$175,850 M

* Personal Care YOY comparison is of Top 15 brands but the total is Top 20
Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)

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The Personal Care category expanded from a Top 15 to a Top 20 as leading brands found innovative ways to counter fragmentation and a pullback in consumer spending.

Skincare was the star segment for much of the 2020s. But growth has moderated in this space as consumers economised. This could yield new opportunities for mass and ‘masstige’ brands – many of which now go toe to toe with the upscale players on efficacy and innovation. But a crowded market complicates the path to outsize growth.

With little room for further price increases, brands at all price tiers are now targeting volume gains and emphasising value for money. What does innovation look like in this context? The answer varies by location and brand. But in general, it involves more ‘dimensional’ Meaningfulness: more well-rounded intelligence, more holistic benefits. Achieve these, and what generally follows is better Pricing Power – which can defend brands’ existing price points against ‘dupe’ plays just as well as it can enable further price hikes.

In western markets, older consumers have increased their share of category spend. That segment has always had a strong, inherent ‘why’ when it comes to investing in personal care (they want more agency over the ageing process). And they’re also more willing (and able) to pay for ‘prestige’ offers – provided they see genuine innovation or other clear points of difference.

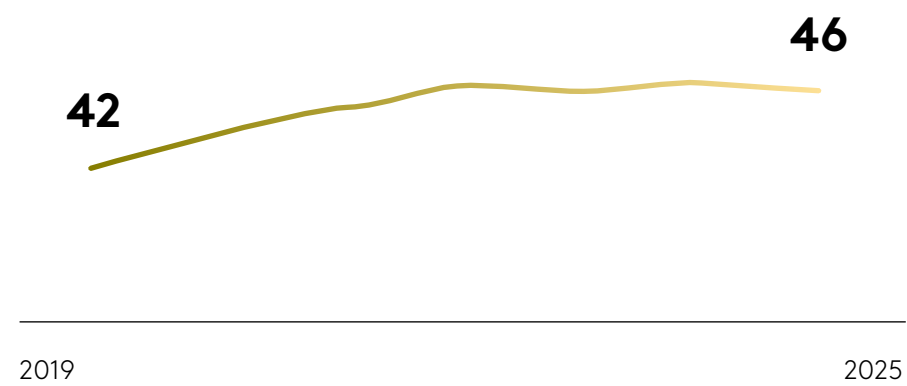
Youth engagement remains critical in key ‘rising’ markets like India and China, however. These consumers can be quickly won, but just as quickly lost. That’s as true in the west as it is in Asia. Demand for influencer and founder-led beauty brands has begun to cool of late – a reminder that while social media hype is an important part of brand building these days, it needs to be accompanied by strong brand equity and innovation for the long run.

L’Oréal Paris’s ‘Beauty Stimulus’ Plan illustrates how this truth can be operationalised. Rather than follow the market, the world’s largest personal care brand has recommitted to offer-led growth. The focus is on experiences and benefits that competitors cannot easily replicate, centred around blockbuster – and hype-worthy – innovations. (For the L’Oréal group, these include products like *Gloss Absolu* by *Kérastase*, *P-TIOX* by *SkinCeuticals*, and the *Elvive Growth Booster*.)

Innovation is only one part of the puzzle, of course. Brands of all sizes must also ensure that would-be ‘hero products’ break through in the marketplace and across the media landscape. Physical retail is still the leading channel for discovery. But ecommerce storefronts and social shopping channels can now perform a similar function online.

Meaningful connections have become increasingly important for Pricing Power

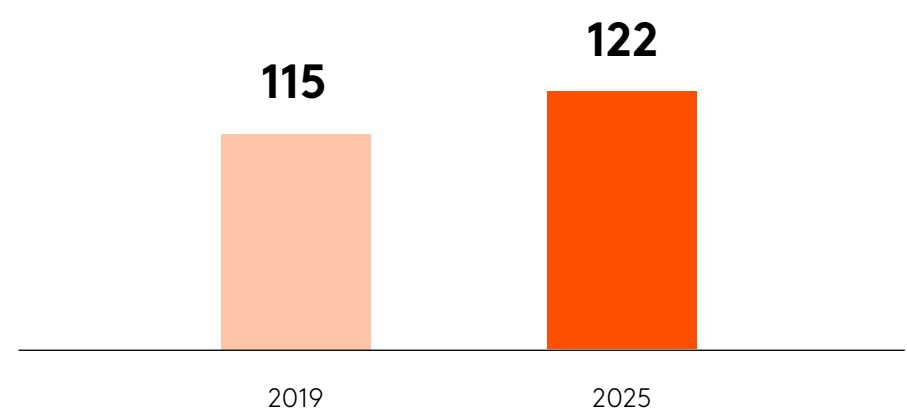
Meaningful contribution to Pricing Power in Personal Care %



Source: Kantar BrandZ, analysis of 206 Personal Care categories, 2019–2025, rolling 2-year trend

Leading brands have stayed ahead by meeting more needs

Personal Care Top 15, average Meaningful Index



Source: Kantar BrandZ, Global Top 15 Personal Care Brands, 2019–2025



Ranjana Gupta

Director, India, Kantar

ranjana.gupta@kantar.com

India’s personal care reset

The Indian personal care sector is thriving, fuelled by digitisation and democratisation of expertise. Large brands must stay agile as D2C players and startups such as Minimalist attract consumers eager to challenge legacy products and regimens. The narrative has shifted from nature versus science to proven efficacy, with ingredients being the route to credibility, not just a story.

Online influencers, especially dermatologists and skin experts, now carry more weight than film stars, though authenticity remains crucial as paid promotions can backfire. Men’s grooming, while still small, is witnessing more open conversations and experimentation, expanding beyond mere deodorants.

Personal care in India is now more dynamic and challenging than ever. Large brands face scrutiny as platforms empower consumers to question old assumptions, exemplified by Fair & Lovely’s struggle post-rebrand. Simultaneously, newer brands must navigate the challenge of scaling up and meeting rapidly evolving consumer demands in a complex market. Success in Indian personal care now demands a long-term strategy grounded in a nuanced, multi-layered understanding of the consumer.

PERSONAL CARE

Digital marketing has become more saturated and expensive of late, however, while influencer impact is weakening. What's rising in their place? Brand-led storytelling, AI-optimised targeting, micro influencer campaigns, and user-generated content. And above all else, better signal intelligence – so that brands can know what's working and what's not (with regards to both short term sales *and* overall brand momentum).

Also working: a more holistic view of Meaning (meeting people's needs), with a focus on wellness and 'good for you' ingredients. According to a recent survey by Kenvue, 88% of people believe personal care positively impacts their health. Cosmeceuticals and 'beauty tech' tools are also doing well, though the latter has attracted more competitors from the consumer tech space like Shark (LED masks) and Dyson (hair stylers).

Fragrance is another success story. Why? Because the segment is emotionally resonant and commercially high-margin, with immediately apparent 'benefits'. But also because there's so much room to differentiate. It's easier to come up with a totally new take on a gardenia scent, say (whether sweet or spicy, sour or creamy) than it is to distinguish your brand's take on tomato-red lipstick from a competitor's. Credit, too, to the wonderful world of #PerfumeTok.

But it also helps that fragrance is an area where behavioural trends are clearly on brands' side. Older generations often settle on a single signature scent. Gen Z consumers are more likely to treat fragrance as a 'wardrobe building' opportunity, assembling collections to suit different moods and occasions.



Akiko Kosukegawa
Head of Brand
Guidance, Kantar
akiko.kosukegawa@kantar.com

AI and science define trust

Japanese consumers tend to highly value personalised care that is rationally optimised based on scientific evidence. Skincare manufacturers such as Kao and Kose offer personalised skincare counselling services utilising AI technology. By combining smartphone-based skin measurement, proprietary skin analysis, and online beauty consultations, they provide an environment where consumers can select skincare products tailored to their needs anytime, anywhere.

In luxury personal care, which is a rapidly growing market in Japan, cutting-edge insights backed by years of dermatological research and proprietary data are prioritised over the technology itself as key elements in creating a 'special experience designed just for you'. Conversely, in mass-market personal care, products that use AI diagnostics and IoT devices to clearly visualise the condition of the skin and body through numerical data and images are gaining popularity.

The ability to easily determine 'the right care for oneself' based on scientific data, rather than relying on subjective feelings or intuition, provides consumers with a sense of reassurance and satisfaction.



Serene Wong
Global Client Director,
Kantar
serene.wong@kantar.com

The dual engine of growth in personal care

The global personal care market is being reshaped by two powerful and seemingly contrasting demographic forces: older consumers who are growing their share of category spend; and younger cohorts (Gen Z and Gen Alpha) who are driving volume, cultural direction, and digital-first growth, especially in emerging markets. Far from being in conflict, these dynamics together create a diversified, resilient engine for brand growth – provided companies understand the distinct motivations, expectations, and value systems that guide each group.

Brands must build a bifocal strategy: protect and premiumise with older consumers through trust, clarity, and proven efficacy. At the same time, they should stay culturally relevant with Gen Z and Alpha via creators, playful innovation, and frictionless digital discovery.

PERSONAL CARE

BRAND SPOTLIGHT



2026 BRAND VALUE

\$4,412 M

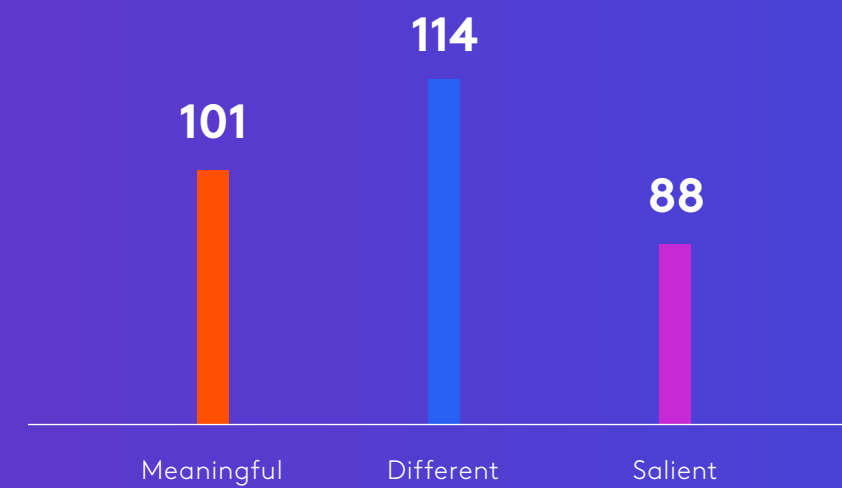
New

Achieving its Chief Marketing Objective

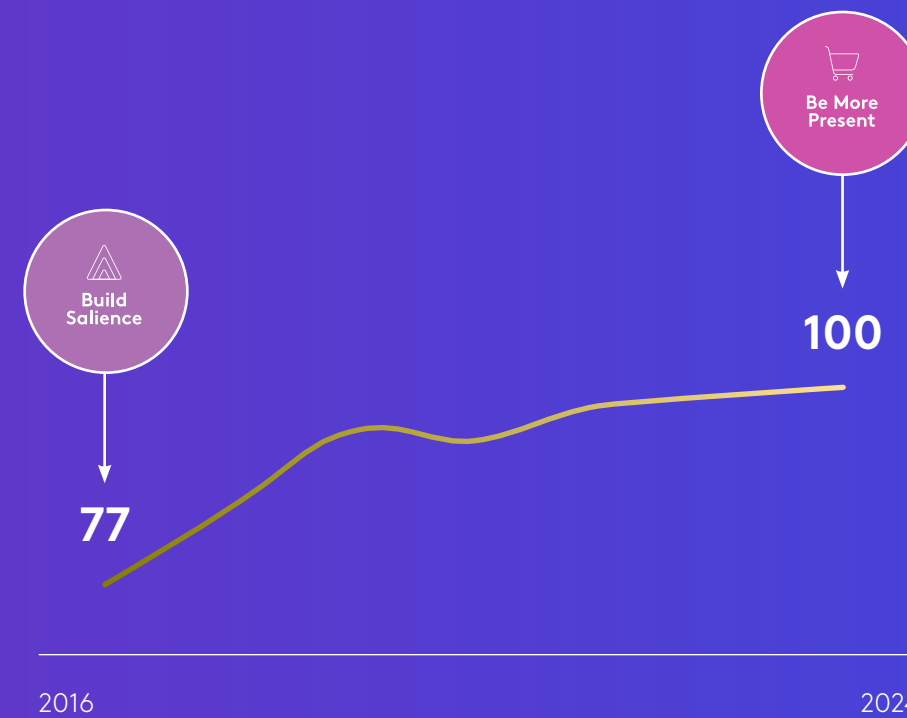
Founded in France in 1975, La Roche-Posay built its brand identity around the dermatological benefits of its namesake thermal spring water. From there, it earned specialist credentials through close collaborations with dermatologists (and other skin and sun-protection experts). In its home market, this specialist heritage has driven strong Meaningful Difference for La Roche-Posay: the brand is seen as one of the best in its field, with trusted expertise in treating concerns such as acne, sensitivity, and sun damage.

From there, La Roche-Posay has worked to build Salience through purposeful activities like its well-known melanoma awareness campaigns. More than just a slogan, these efforts include free skin-check pop-ups, emotionally led campaigns around the impact of skin conditions, and strong pharmacy partnerships across France. The result? Steadily building Salience achieved by linking La Roche-Posay to real-world skin-health – and better outcomes.

Global brand equity



Salient Index, France



Source: Kantar BrandZ, Most Valuable Global Brands, global data, 2026; France, Female Beauty & Skincare, 2016–2024

BRAND SPOTLIGHT



2026 BRAND VALUE

\$3,693 M

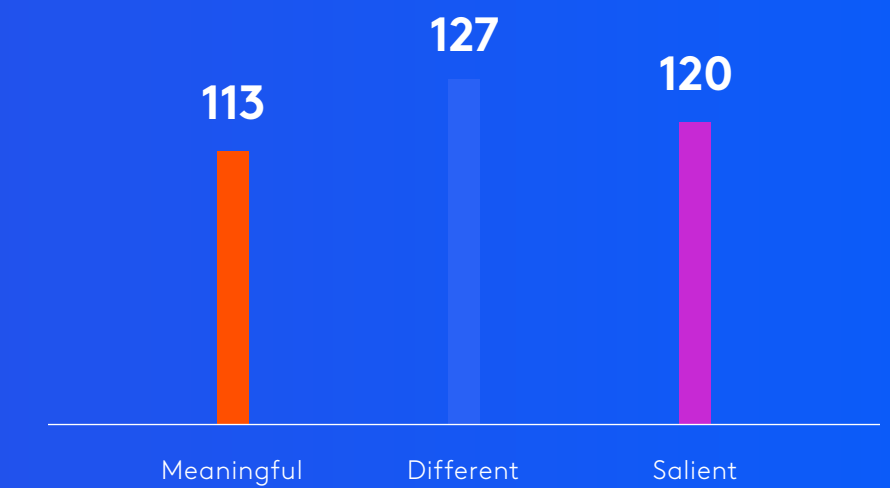
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Meeting more needs through innovation

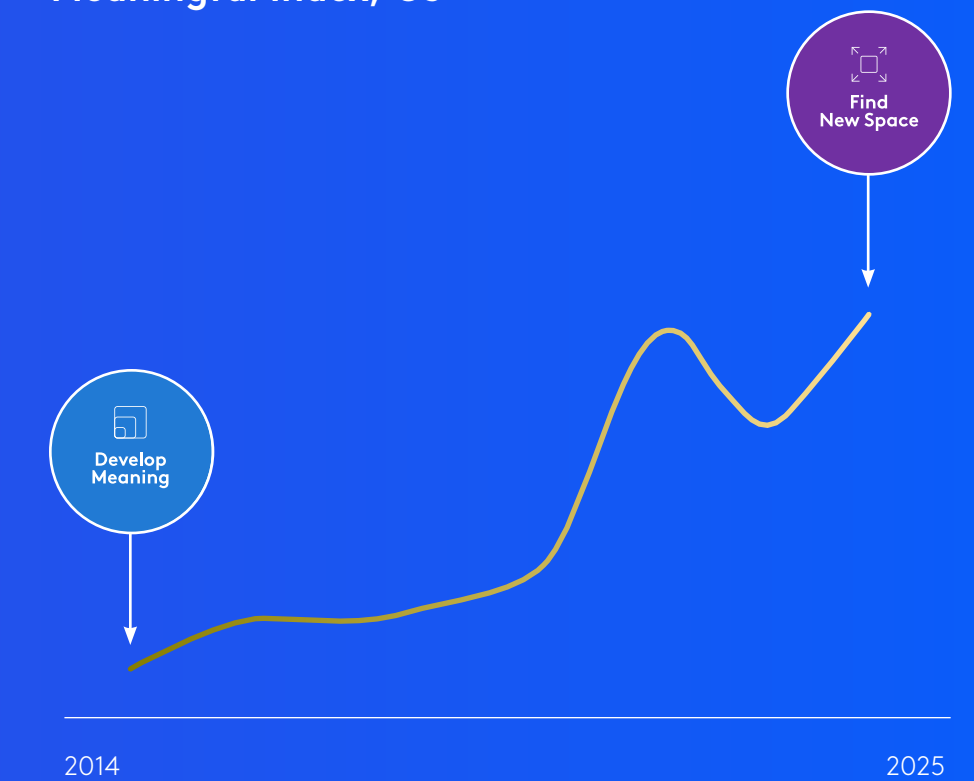
Sensodyne was founded in 1961 in the US as a desensitising toothpaste. In recent years, the brand has reframed itself as a toothpaste for protection and prevention, rather than for episodic symptom relief. This shift has been reinforced by innovations such as whitening for sensitive teeth, which have removed the trade off between comfort and cosmetic results *without* diluting the brand's sensitivity credentials. Being the #1 dentist-recommended brand for sensitive teeth acts as reassurance at scale.

The result is greater relevance, particularly in the US and India, with the brand recently adding 15 million new consumers in India alone. Looking ahead, growth can be expected, given the brand's high Future Power globally.

Global brand equity



Meaningful Index, US



Source: Kantar BrandZ, Most Valuable Global Brands, global data, 2026; USA, Oral Care, 2014–2025

PERSONAL CARE

BRANDS TO WATCH

GRANADO RIO DE JANEIRO

Founded in 1870, **Granado** stays relevant through frequent product launches and immersive retail experiences, both in its flagship stores and through frequent cultural pop-ups. In addition to expanding across its home market of Brazil, Granado has been making inroads in Europe and the US.

Future Power Index

146

Source: Kantar BrandZ, Brazil, Personal Wash, 2024

Avène

Avène has evolved from an occasional treatment brand (for conditions such as eczema) into an everyday skin-health staple. While retaining its clinical foundations, heritage sourcing, and strong distribution in French pharmacies, Avène has expanded into daily barrier repair and preventative care through innovative new formulas. It is seen as a trusted, specialist brand that works better than others – earning it strong momentum in France.

Future Power Index

144

Source: Kantar BrandZ, France, Female Skincare & Beauty, 2024



IMPLICATIONS

01

DIMENSIONALISE YOUR MEANINGFUL CONNECTIONS

In a fragmented category with limited pricing headroom, growth depends on proving value beyond functional performance. Consumers are looking for brands that blend efficacy with emotional resonance, everyday relevance, and clear value for money. Personal care brands need to create experiences, stories, and rituals that embed themselves into people's routines.

02

INNOVATE TO MEET REAL NEEDS

Personal care brands can drive relevance by investing in human-led innovation that solves real needs. By grounding innovation in the routines, pressures, and wellbeing priorities of consumers, brands create solutions that feel genuinely useful and emotionally resonant. This keeps them distinctive in a saturated market and strengthens both Meaning and long-term relevance.