

## Soap, Bath and Shower Products - US - February 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Opportunities exist for makers and marketers of soap, bath and shower products to improve transparency and efficacy claims, focus on the differentiated needs of the multicultural consumer, and address efficiencies in product usage to match fast-paced consumer lifestyles.”

– Molly Maier, Category Manager, Health, Household, Beauty & Personal Care

### This report looks at the following areas:

- How can industry players reassure consumers regarding product safety and efficacy?
- What opportunities are there to target needs of the multicultural consumer?
- What opportunities are there to align with consumers' fast-paced lifestyle?

Soap, bath and shower product usage has near total penetration as the vast majority of people use these products for personal hygiene purposes. Because soap, bath and shower products cater to consumers across a range of segments, there's high incidence for multiple product use, with almost half using three or more types of products. A strong, steady consumer base provides a solid foundation; however, as a mature market, significant growth remains elusive.

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Soap, Bath and Shower Products - US - February 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Scope and Themes

What you need to know

Definition

Data sources

Sales data

Consumer survey data

Abbreviations and terms

Abbreviations

### Executive Summary

Overview

The market

Figure 1: Total US sales and fan chart forecast of soap, bath and shower products, at current prices, 2009-19

Market factors

Controversial antibacterial claims temper growth but still in demand

Population growth and shifts

Figure 2: US population, by age, 2015

Segment performance

Figure 3: Total US retail sales of soap, bath and shower products, by segment, at current prices, 2012 and 2014

The consumer

Bar soap, liquid hand soap, and body wash are used by majority of consumers

Figure 4: Product usage, November 2014

Unisex varieties are preferred for the most functional soap, shower and bath products

Figure 5: Types of soap, bath, and shower products used, November 2014

Usage behaviors point to demand for multitasking products

Figure 6: Most prominent product usage behaviors, November 2014

Widespread interest in deodorizing benefits, followed by value-added claims

Figure 7: Interest in new product claims and attributes, November 2014

What we think

### Issues and Insights

How can industry players reassure consumers regarding product safety and efficacy?

The issues

The implications: Focus on transparency, claims that verify efficacy

What opportunities are there to target needs of the multicultural consumer?

The issues

The implications: Develop regimes for ethnic skin, leverage interest in personalization

What opportunities are there to align with consumers' fast-paced lifestyle?

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Soap, Bath and Shower Products - US - February 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## The Issues

The implications: Emphasize convenience in packaging, multiple use, and functional benefit

## Trend Application

Trend: Man in the Mirror

Trend: Factory Fear

Trend: Slow it All Down

## Market Size and Forecast

### Key points

Mature market supports steady sales

Steady gains expected to continue

### Sales and forecast of soap, bath and shower products

Figure 8: Total US sales and forecast of soap, bath and shower products, at current prices, 2009-19

Figure 9: Total US sales and forecast of soap, bath and shower products, at inflation-adjusted prices, 2009-19

### Fan chart forecast

Figure 10: Total US sales and fan chart forecast of soap, bath and shower products, at current prices, 2009-19

## Market Drivers

### Key points

Controversial antibacterial claims temper growth but still in demand

Growing population should benefit market

Figure 11: US population, by age, 2010, 2015, and 2020

Marketing to men is key to future growth

Targeting families is important but offers limited opportunity

Figure 12: US households, by presence of own children, 2003-13

Evolving multicultural demographics influence innovation

Figure 13: US population by race and Hispanic origin, 2009, 2014, and 2019

Figure 14: Purchasing power, by race/Hispanic origin, 1990-2018

## Segment Performance

### Key points

Soap, bath and shower sales continue steady growth in most segments

Hand sanitizers get a boost

Sales of soap, bath and shower products, by segment

Figure 15: Total US retail sales of soap, bath and shower products, by segment, at current prices, 2012 and 2014

Figure 16: Total US retail sales of soap, bath and shower products, by segment, at current prices, 2009-14

## Segment Performance – Liquid Body Wash

### Key points

Liquid body wash continues to drive category growth

Sales and forecast of liquid body wash

Figure 17: Total US retail sales and forecast of liquid body wash, at current prices, 2009-19

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Soap, Bath and Shower Products - US - February 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Segment Performance – Bar Soap

### Key points

Bar soap sales are sluggish

Sales and forecast of bar soap

Figure 18: Total US sales and forecast of bar soap, at current prices, 2009-19

## Segment Performance – Liquid Hand Soap

### Key points

Liquid hand soap is a steady performer

Sales and forecast of liquid hand soap

Figure 19: Total US sales and forecast of liquid hand soap, at current prices, 2009-19

## Segment Performance – Hand Sanitizer

### Key points

Hand sanitizer sales are volatile

Sales and forecast of hand sanitizer

Figure 20: Total US sales and forecast of hand sanitizer, at current prices, 2009-19

## Segment Performance – Bath Products

### Key points

Bath products segment challenged to produce notable growth

Sales and forecast of bath products

Figure 21: Total US sales and forecast of bath products, at current prices, 2009-19

## Retail Channels

### Key points

“Other” retail channels account for largest share of market sales

Drug stores exhibit strong two-year growth

Sales of soap, bath and shower products, by channel

Figure 22: Sales of soap, bath and shower products, by channel, 2012 and 2014

Figure 23: Total US retail sales of soap, bath, and shower products, by channel, at current prices, 2009-14

## Leading Companies

### Key points

Unilever leads soap, bath and shower category

P&G jumps Colgate-Palmolive, narrows gap to the #2 spot

Manufacturer sales of soap, bath and shower products

Figure 24: MULO sales of soap, bath and shower products, by leading companies, rolling 52-weeks 2013 and 2014

## Brand Share and Usage – Liquid Body Wash

### Key points

Unilever’s Dove leads segment in sales and share

P&G finds success across brand lines

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Soap, Bath and Shower Products - US - February 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Colgate-Palmolive launches Tom's of Maine into body wash segment

Manufacturer sales of liquid body wash

Figure 25: MULO sales of liquid body wash, by leading companies, rolling 52-weeks 2013 and 2014

Dove is most popular body wash among body wash users

Figure 26: Brands of body wash used, by gender, April 2013-June 2014

## Brand Share and Usage – Bar Soap

Key points

Dove has a commanding lead in bar soap brand sales

Olay outperforms other bar soap brands with value-added benefits

Opportunity for smaller brands to capture share of segment

Manufacturer sales of bar soap

Figure 27: MULO sales of bar soap, by leading companies, rolling 52-weeks 2013 and 2014

Dove is most used bar soap brand

Figure 28: Brands of bar soap used, by gender, April 2013-June 2014

## Brand Share and Usage – Liquid Hand Soap

Key points

Colgate-Palmolive has a solid lead in segment sales, but sales are stagnant

Henkel and Method are standout performers

Private label losing share to branded products

Manufacturer sales of liquid hand soap

Figure 29: MULO sales of liquid hand soap, by leading companies, rolling 52-weeks 2013 and 2014

Softsoap most popular liquid hand soap

Figure 30: Brands of liquid hand soap use, by household income, April 2013-June 2014

## Brand Share – Hand Sanitizer

Key points

Purell continues to steal share from segment leader, Germ-X

Manufacturer sales of hand sanitizers

Figure 31: MULO sales of hand sanitizers, by leading companies, rolling 52-weeks 2013 and 2014

## Brand Share – Bath Products

Key points

Bath products get boost from new product innovation

Private label entices shoppers with value price points

Manufacturer sales of bath products

Figure 32: MULO sales of bath products, by leading companies, rolling 52-weeks 2013 and 2014

## Innovations and Innovators

New product launch trends

Figure 33: Share of soap, bath and shower product launches, by subcategory, 2010-14

Figure 34: Top 10 soap, bath and shower product claims, by share, 2010-14

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Soap, Bath and Shower Products - US - February 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Product innovations

Adding value to soap, bath and shower products

Demographic-specific innovation

Multitasking products

Limited-edition/seasonal innovation

Fruity notes are remain popular fragrance

## Marketing Strategies

Overview of the brand landscape

Marketing to men

Old Spice: Satire and sex

Figure 35: Old Spice body wash and deodorant, television ad, 2014

Lifestyle positioning

Method: Life can be messy

Consumer education

Purell: Myth-buster

## Product Usage

Key points

Soap, bath and shower products are an essential component of hygiene

Figure 36: Product usage, November 2014

High incidence of multiple product usage

Figure 37: Repertoire of products usage, by gender and age, November 2014

Men most likely to use bar soap

Figure 38: Product usage, by gender, November 2014

Bath products most popular among 25-34s

Figure 39: Product usage, by age, November 2014

Households with children regularly use hand sanitizers

Figure 40: Product usage, by presence of children in household, November 2014

## Gender-specific vs. Unisex Product Use

Key points

Bath products usage skews toward female-specific types

Figure 41: Types of soap, bath, and shower products used, November 2014

Unisex soap, bath and shower product usage

Figure 42: General market/unisex use of soap, bath, and shower products, by gender and age, November 2014

Female-specific soap, bath and shower product usage

Figure 43: Female-specific use of soap, bath, and shower products, by gender and age, November 2014

Male-specific soap, bath and shower product usage

Figure 44: Male-specific use of soap, bath, and shower products, by gender and age, November 2014

## Reasons for Using Gender-specific Products

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Soap, Bath and Shower Products - US - February 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Key points

### Fragrance drives usage of gender-specific products

Figure 45: Reasons for using gender-specific soap, bath, and shower products, by gender, November 2014

### Packaging for gender-specific products influences use among 25-34s

Figure 46: Reasons for using gender-specific soap, bath, and shower products, by age, November 2014

### Urban users think gender-specific products work better/offer more beauty benefits

Figure 47: Reasons for using gender-specific soap, bath, and shower products, by area, November 2014

## Usage Behaviors

### Key points

#### Consumer behavior shows tendency to use bath products as all-purpose

Figure 48: Soap, bath, and shower product usage behaviors, November 2014

#### Women are more likely to use products designed for specific skin conditions

Figure 49: Soap, bath, and shower product usage behaviors, by gender, November 2014

Figure 50: Soap, bath, and shower product usage behaviors, by gender and age, November 2014

#### Younger users most likely to use multiple products

Figure 51: Soap, bath, and shower product usage behaviors, by age, November 2014

#### Urbanites more likely to use specialized bath products

Figure 52: Soap, bath, and shower product usage behaviors, by area, November 2014

## Interest in New Product Attributes and Claims

### Key points

#### Widespread interest in bath products with deodorizing properties

Figure 53: Interest in new product claims and attributes, November 2014

#### Women seek ultra-gentle and intensive moisturizing products

Figure 54: Interest in new product claims and attributes – Any interest, by gender, November 2014

Figure 55: Interest in new product claims and attributes – Any interest, by gender and age, November 2014

#### Bath product users aged 25-34 show high responsiveness to new product innovation

Figure 56: Interest in new product claims and attributes – Any interest, by age, November 2014

#### Urbanites are a prime target for new product innovation

Figure 57: Interest in new product claims and attributes – Any interest, by area, November 2014

## Liquid Hand Soap and Hand Sanitizer Usage Behaviors

### Key points

#### Hand sanitizers stored in multiple places

Figure 58: Liquid hand soap and hand sanitizer usage behaviors, November 2014

#### Young women are more likely to use hand soaps/sanitizers with seasonal fragrances

Figure 59: Liquid hand soap and hand sanitizer usage behaviors, by gender and age, November 2014

#### More affluent consumers tend to do more research on ingredient profiles

Figure 60: Liquid hand soap and hand sanitizer usage behaviors, by household income, November 2014

#### Parents are more likely to research the ingredients in liquid hand soap/sanitizers

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Soap, Bath and Shower Products - US - February 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 61: Liquid hand soap and hand sanitizer usage behaviors, by presence of children in household, November 2014

## Race and Hispanic Origin

### Key points

**Multicultural use of soap, bath and shower product use is high**

Figure 62: Product usage, by race/Hispanic origin, November 2014

**Multicultural demographics are most likely to use a repertoire of five or more products**

Figure 63: Repertoire of products usage, by race/Hispanic origin, November 2014

**Gender-specific vs. unisex product use**

Figure 64: Female-specific use of soap, bath, and shower products, by race/Hispanic origin, November 2014

Figure 65: Male-specific use of soap, bath, and shower products, by race/Hispanic origin, November 2014

**Hispanics use gender-specific scents to be different than their spouse**

Figure 66: Reasons for using gender-specific soap, bath, and shower products, by race/Hispanic origin, November 2014

**Black consumers use multiple soap products**

Figure 67: Soap, bath, and shower product usage behaviors, by race/Hispanic origin, November 2014

**Asians receptive to new product claims and attributes**

Figure 68: Interest in new product claims and attributes – Any interest, by race/Hispanic origin, November 2014

**Hispanics are interested in decorative containers for hand soap/sanitizers**

Figure 69: Liquid hand soap and hand sanitizer usage behaviors, by race/Hispanic origin, November 2014

## Appendix – Other Useful Consumer Tables

**Use of hand sanitizers increases with household size**

Figure 70: Product usage, by household size, November 2014

**Younger male users think gender-specific products work better than unisex counterparts**

Figure 71: Reasons for using gender-specific soap, bath, and shower products, by gender and age, November 2014

**Unisex vs. gender-specific usage**

Figure 72: Types of soap, bath, and shower products used – General market/unisex, by race/Hispanic origin, November 2014

**Over 55s least likely to use Dove**

Figure 73: Brands of bar soap used, by age, April 2013-June 2014

**Households without kids more likely to be sold brand users**

Figure 74: Brands of liquid hand soap use, by presence of children in household, April 2013-June 2014

**Primary brands users of body wash skew younger**

Figure 75: Brands of body wash used, by age, April 2013-June 2014

**Hispanics show strong allegiance to the Dove brand**

Figure 76: Brands of bar soap used, by race/Hispanic origin, April 2013-June 2014

Figure 77: Brands of liquid hand soap use, by race/Hispanic origin, April 2013-June 2014

Figure 78: Brands of body wash used, by race/Hispanic origin, April 2013-June 2014

**Less affluent consumers tend to be the most brand loyal**

Figure 79: Soap, bath, and shower product usage behaviors, by household income, November 2014

## Appendix – Trade Associations

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)