

Soap, Bath and Shower Products - UK - March 2010

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What is this report about?

Since Soap, Bath and Shower Products – UK, November 2008 was published, little has changed. The £680 million market has achieved modest growth although the overall trend towards shower products instead of bath additives and liquid soap instead of bar soap has gathered momentum.

Despite the recession, the functional nature of the market has meant that people continued to buy soap, bath and shower (SBS) products. Although consumers claim to be concerned by the environment, the cost on their wallets became increasingly important. An estimated 17 million adults admitted to looking for special offers more often since the recession began. Aggressive price promotions continue to characterise the market as manufacturers and retailers also look to cut their marketing overheads, shifting their promotional strategies from above the line to below the line at point of sale. This has helped to sustain value sales growth for multiple retailers as people pick up a bargain whilst doing their regular shop.

What have we found out?

- Despite an overall rise in the number of new launches, the soap, bath and shower category accounts for a declining share of beauty and personal care launches. The sector lacks excitement and is failing to engage consumers at the point of purchase with its new launches.
- After a couple of years with no new economy products, the recession spurred a flurry of launches in economy products. The number of economy launches rose from 1% in 2008 to almost 7% in 2009.
- An estimated 17 million (four in ten) adults have looked for special offers on soap, bath and shower products more often since the recession. Around 8 million have bought cheaper products and 5 million have switched to own-label in order to save money.
- Around 5.5 million adults pour products into their own containers to use out of the home at the gym or when travelling, or to display in the bathroom. This could create new opportunities in refill innovation along the lines of the milk industry's Jug-It or in branded refill bottles.
- A lack of relevance to modern lifestyles means that bar soap and bath additives saw the greatest value sales decline between 2004 and 2009, falling by 8% and 10% respectively. This may be one reason that people give away soap and bath gift sets to charity, because they don't use half of the products contained within the set. Gift sets should consider substituting bath products for shower and the bar soap for liquid soap.

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