

Body Care - US - June 2013

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.



“While the body care category has been struggling, shifting consumer’s focus from price and promotional incentives to improved functionality and value-added benefits should help put the category on a growth track.”

– Shannon Romanowski, Beauty and Personal Care Analyst

In this report we answer the key questions:

- How can manufacturers differentiate their products to encourage spending?
- How can the industry better communicate the benefits of anti-aging body care?
- How important are organic and natural products in the body care category?

The body care category has struggled to gain traction over the last five years as consumers continue to be motivated by price, value, and promotional incentives when purchasing the category. However, despite the budget-shopping mindset of body care shoppers, consumers do show an interest in and a willingness to pay more for products that offer improved functionality and therapeutic benefits. In addition to improved functionality, emerging segments such as male-specific body care and the underdeveloped anti-aging segment hold future growth potential.

This report explores category dynamics including an analysis of sales and market share trends in the category by retail channel and brands, an examination of marketing strategies and social media efforts, and exclusive Mintel consumer research into usage, attitudes, and new opportunities concerning the body care category.

BUY THIS
REPORT NOW

VISIT:
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:
oxygen@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

Body Care - US - June 2013

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

Advertising creative

Abbreviations and terms

Abbreviations

Terms

Executive Summary

The market

Figure 1: Total U.S. sales and fan chart forecast of body care products, at current prices, 2007-17

Market factors

Aging population holds potential for body care category

Figure 2: U.S. population aged 18 or older, by age, 2013 vs. 2018

Economy and consumer confidence improving, but still shaky

The consumer

Women are primary users of body care, though men hold opportunity

Figure 3: Body care product use, by gender, February 2013

Shopping behavior dictated by skin needs

Figure 4: Top five body care shopping behaviors, February 2013

Body care users willing to pay for improved functionality

Figure 5: Interest in top five body care claims based on price, February 2013

Forms that provide added value could spur category growth

Figure 6: Interest in body care forms, February 2013

Attitudes toward body care

Figure 7: Body care attitudes, February 2013

What we think

Issues in the Market

How can manufacturers differentiate their products to encourage spending?

How can the industry better communicate the benefits of anti-aging body care?

How important are organic and natural products in the body care category?

Insights and Opportunities

Certified organic

Clothes that moisturize

BUY THIS
REPORT NOW

VISIT: 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: oxygen@mintel.com

Body Care - US - June 2013

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.

Body sculpting benefits

Trend Applications

Trend: Guiding Choice

Trend: Extend my Brand

Mintel Futures: Old Gold

Market Size and Forecast

Key points

Struggles continue for body care category

Figure 8: Total U.S. retail sales and forecast of body care products, at current prices, 2007-17

Figure 9: Total U.S. retail sales and forecast of body care products at inflation-adjusted prices, 2007-17

Fan chart forecast

Figure 10: Total U.S. sales and fan chart forecast of body care products, at current prices, 2007-17

Market Drivers

Aging population holds potential for body care

Figure 11: U.S. population aged 18 or older, by age, 2008-18

Economic indicators stabilize, though remain shaky

Figure 12: Thomson Reuters/University of Michigan Index of Consumer Sentiment, January 2007-April 2013

Figure 13: Bureau of Labor Statistics unemployment/underemployment, January 2007-April 2013

Households with kids on the rise

Figure 14: Households by presence of children, 2002-12

Competitive Context

Consumers seek moisture in categories outside of body care

Figure 15: Interest in moisturizing attribute when purchasing body wash or bar soap, by gender and age, December 2012-January 2013

Retail Channels

Key points

Body care seeing minimal gains across all retail channels

Figure 16: Total U.S. retail sales of body care products, by channel, 2010 and 2012

Other retail channels dominate body care retail sales

Drug stores and supermarkets losing market share

Drug stores

Supermarkets

Figure 17: Total U.S. retail sales of body care products, by channel, at current prices 2007-12

Leading Companies

Key points

Kao overtakes J&J and Unilever for top spot in body care category

Figure 18: MULO sales for Kao Corporation of Japan, rolling 52-weeks 2012 and 2013

Figure 19: MULO sales for Johnson & Johnson and Unilever, rolling 52-weeks 2012 and 2013

BUY THIS
REPORT NOW

VISIT: 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: oxygen@mintel.com

Body Care - US - June 2013

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.

Beiersdorf posts sales gains

Figure 20: MULO sales for Beiersdorf Inc., rolling 52-weeks 2012 and 2013

Smaller, therapeutic brands see success in category

Figure 21: MULO sales for Chattem, Galderma Laboratories, E.T. Browne Drug and Valeant Pharmaceuticals, rolling 52-weeks 2012 and 2013

P&G struggles in body care

Figure 22: MULO sales for Procter & Gamble, rolling 52-weeks 2012 and 2013

Manufacturer sales of body care

Figure 23: MULO market share of body care, by leading companies, rolling 52-weeks 2012 and 2013

Figure 24: MULO sales of body care, by leading companies, rolling 52-weeks 2012 and 2013

Innovations and Innovators

New product launch trends

Figure 25: Body care and hand/nail cream product launches, by subcategory, 2007-13*

Figure 26: Body care and hand/nail cream product launches, by top 15 product claims, 2007-13*

Product innovations

Body oils

Body part specific

Intensive healing

Multi-functional

Night products

Seasonal products

Marketing Strategies

Overview of the brand landscape

Strategy: Quick and convenient

Figure 27: Vaseline, "Ready Fast," TV ad, 2013

Figure 28: Garnier, "Gel Moisture," TV ad, 2013

Strategy: Marketing to men

Figure 29: Palmer's, "Football Twins," TV ad, 2012

Figure 30: NIVEA print ad, 2012

Strategy: Treating skin conditions

Figure 31: Gold Bond, "Under Control," TV ad, 2013

Figure 32: Curél print ad, 2012

Strategy: Natural positioning/ Healthy skin

Figure 33: Aveeno, "Looking Better," TV ad, 2013

Figure 34: St. Ives, "Just Like New," TV ad, 2013

Figure 35: Jergens print ad, 2013

Social Media

Key points

Key social media metrics

BUY THIS
REPORT NOW

VISIT: 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: oxygen@mintel.com

Body Care - US - June 2013

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 36: Key brand metrics, body care brands, May 2013

Market overview

Brand usage and awareness

Figure 37: Usage and Awareness of selected body care brands, February 2013

Interaction with brands

Figure 38: Interaction with selected body care brands, February 2013

Online conversations

Figure 39: Percentage of consumer conversations, by selected body care brands, April 10-May 9, 2013

Figure 40: Online mentions, selected body care brands, percent of daily mentions, by day, April 10-May 9, 2013

Where are people talking about body care brands?

Figure 41: Mentions, by page type, selected body care brands, percent of daily mentions, April 10-May 9, 2013

What are people talking about?

Figure 42: Mentions, by type of conversation, selected body care brands, April 10-May 9, 2013

Figure 43: Major areas of discussion surrounding body care brands, percent of daily mentions, by day, April 10-May 9, 2013

Figure 44: Major areas of discussion surrounding body care brands, by page type, April 10-May 9, 2013

Brand analysis

Vaseline

Figure 45: Vaseline key social media indicators, May 2013

Key online campaigns

What we think

Jergens

Figure 46: Jergens key social media indicators, May 2013

Key online campaigns

What we think

Bath & Body Works

Figure 47: Bath & Body Works key social media indicators, May 2013

Key online campaigns

What we think

NIVEA

Figure 48: NIVEA key social media indicators, May 2013

Key online campaigns

What we think

Palmer's

Figure 49: Palmer's key social media indicators, May 2013

Key online campaigns

What we think

Eucerin

Figure 50: Eucerin key social media indicators, May 2013

Key online campaigns

BUY THIS
REPORT NOW

VISIT: 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: oxygen@mintel.com

Body Care - US - June 2013

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.

What we think

Body Care Usage

Key points

Majority of consumers use hand and body lotion

Figure 51: Body care product use, by gender, February 2013

Women are primary users of body care, though men remain an opportunity

Figure 52: Body care product use, by gender and age, February 2013

Households with children over index for use of body care products

Figure 53: Body care product use, by presence of children in household, February 2013

Figure 54: Interested in and would be willing to pay more for body care claims based on price, by presence of children in household, February 2013

Usage and Attitudes – Body Oil

Key points

Young women drive use of body oil

Figure 55: Body oil usage, by gender and age, February 2013

Concerns of greasiness, staining clothes could be hindering body oil usage

Figure 56: Body oil attitudes, all vs. body oil users, February 2013

Figure 57: Body oil attitudes, by gender and age, February 2013

Shopping for Body Care

Key points

Skin needs dictate body care usage

Brand familiarity and price influence shopping behavior

Younger body care shoppers seeking customized options

Figure 58: Body care shopping behaviors, by gender, February 2013

Figure 59: Body care shopping behaviors, by gender and age, February 2013

Figure 60: Body care shopping behaviors, by gender and household income, February 2013

Interest in Body Care Claims Based on Price

Key points

Body care users value added functionality

Figure 61: Interest in body care claims based on price, February 2013

Men's body care has room to grow

Figure 62: Interested in and would be willing to pay more for body care claims based on price, by gender, February 2013

Despite struggles, women are interested in anti-aging body care

Figure 63: Interested in and would be willing to pay more for body care claims based on price, by gender and age, February 2013

Value and functionality appeal to budget-conscious consumers

Figure 64: Interested in and would be willing to pay more for body care claims based on price, by gender and household income, February 2013

Interest in Body Care – Forms

Key points

Promotional incentives drive high interest

BUY THIS
REPORT NOW

VISIT: 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: oxygen@mintel.com

Body Care - US - June 2013

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 65: Interest in body care forms, February 2013

Men interested in body care that emphasizes ease of use, convenience

Figure 66: Any interest in body care forms, by gender, February 2013

Body care users interested in eco-friendly and refillable packaging

Figure 67: Any interest in body care forms, by gender and age, February 2013

Figure 68: Any interest in body care forms, by gender and household income, February 2013

Interest in Body Care – Information Sources

Key points

Body care users interested in samples, in-store information

Figure 69: Interest in body care information, February 2013

Figure 70: Any interest in body care information, by gender, February 2013

Mobile apps appeal to young adults

Figure 71: Any interest in body care information, by gender and age, February 2013

Attitudes Toward Body Care

Key points

Women more likely to use different products depending on occasion

Opportunity for body care products with cosmetic benefits

Consumers unconvinced of the need for anti-aging body care

Figure 72: Body care attitudes, by gender, February 2013

Figure 73: Body care attitudes, by gender and age, February 2013

Race and Hispanic Origin

Key points

Body care use varies by race

Figure 74: Body care product use, by race/Hispanic origin, February 2013

Figure 75: Body care attitudes, by race/Hispanic origin, February 2013

Asians seek more specialized body care solutions

Figure 76: Body care shopping behaviors, by race/Hispanic origin, February 2013

Interest in claims differs by race

Figure 77: Interested in and would be willing to pay more for body care claims based on price, by race/Hispanic origin, February 2013

Figure 78: Any interest in body care forms and information, by race/Hispanic origin, February 2013

Cluster Analysis

Figure 79: Body care clusters, February 2013

Cluster 1: Involved

Opportunities

Cluster 2: Habituals

Opportunities

Cluster 3: Basic

Opportunities

BUY THIS
REPORT NOW

VISIT: 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: oxygen@mintel.com

Body Care - US - June 2013

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.

Cluster characteristic tables

Figure 80: Body care product use, by target clusters, February 2013

Figure 81: Body care shopping behaviors, by target clusters, February 2013

Figure 82: Any interest in body care claims based on price, by target clusters, February 2013

Figure 83: Interested in and would be willing to pay more for body care claims based on price, by target clusters, February 2013

Figure 84: Body care attitudes, by target clusters, February 2013

Figure 85: Any interest in body care forms and information, by target clusters, February 2013

Cluster demographics

Figure 86: Target clusters, by demographic, February 2013

Cluster methodology

Key Household Purchase Measures – IRI Builders Panel Data

Hand and Body Lotion

Consumer insights on key purchase measures

Brand map

Figure 87: Brand map, selected brands of hand and body lotion buying rate, by household penetration, 2012*

Brand leader characteristics

Key purchase measures

Figure 88: Key purchase measures for the top brands of hand and body lotion, by household penetration, 2012*

Appendix – Other Useful Consumer Tables

Body care usage

Figure 89: Body care product use, by gender, February 2013

Figure 90: Body care product use, by household income, February 2013

Figure 91: Body care product usage by each brand used, February 2013

Shopping for body care

Figure 92: Shopping behaviors by body product usage, February 2013

Figure 93: Shopping behaviors by body product usage, February 2013

Interest in body care claims based on price

Figure 94: Any interest in body care claims based on price, by gender, February 2013

Figure 95: Any interest in body care claims based on price, by gender and age, February 2013

Figure 96: Any interest in body care claims based on price, by gender and income, February 2013

Attitudes toward body oil

Figure 97: Body oil attitudes, by gender, February 2013

Figure 98: Body oil attitudes, by gender and household income, February 2013

Appendix – Social Media

Usage and awareness

Figure 99: Brand usage or awareness, February 2013

Figure 100: Eucerin usage or awareness, by demographics, February 2013

Figure 101: Jergens usage or awareness, by demographics, February 2013

**BUY THIS
REPORT NOW**

VISIT: 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: oxygen@mintel.com

Body Care - US - June 2013

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 102: Vaseline usage or awareness, by demographics, February 2013

Figure 103: NIVEA usage or awareness, by demographics, February 2013

Figure 104: Palmer's usage or awareness, by demographics, February 2013

Figure 105: Bath & Body Works usage or awareness, by demographics, February 2013

Activities done

Figure 106: Activities done, February 2013

Figure 107: Eucerin – Activities done, by demographics, February 2013

Figure 108: Jergens – Activities done, by demographics, February 2013

Figure 109: Vaseline – Activities done, by demographics, February 2013

Figure 110: NIVEA – Activities done, by demographics, February 2013

Figure 111: Palmer's – Activities done, by demographics, February 2013

Figure 112: Bath & Body Works – Activities done, by demographics, February 2013

Online conversation

Figure 113: Percentage of consumer conversation by selected body care brands, April 10-May 9, 2013

Figure 114: Online mentions, selected body care brands, percent of daily mentions, by day, April 10-May 9, 2013

Figure 115: Mentions by page type, selected body care brands, percent of daily mentions, April 10-May 9, 2013

Figure 116: Mentions by type of conversation, selected body care brands, April 10-May 9, 2013

Figure 117: Major areas of discussion surrounding body care brands, percent of daily mentions, by day, April 10-May 9, 2013

Figure 118: Major areas of discussion surrounding body care brands, by page type, April 10-May 9, 2013

Appendix – Information Resources, Inc. Builders Panel Data Definitions

Information Resources, Inc. Consumer Network Metrics

Appendix – Trade Associations

BUY THIS
REPORT NOW

VISIT: 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: oxygen@mintel.com