

December 2014

Small Kitchen Appliances - US

“Small kitchen appliances must, first and foremost, make food and beverage preparation faster and easier. However, once this core task is met, a host of other motivations and qualities may drive and shape SKA purchasing. How, where, and why different consumers ultimately select a given SKA is also shaped by ...

Beauty & Personal Care Vending - UK

“The BPC vending market is well placed to benefit from emerging key trends in the BPC markets such as customisation and digital testing. The rise of beauty apps has seen consumer awareness of new technologies increase and the BPC vending market has an opportunity to convert experimentation into purchasing.”

Preparing for Guests - UK

“Home entertaining has a big influence on the usage of household care products. Making the home smell fresh is one of the most important elements of preparing the home for guests, and so the development of more premium fragrances in a whole host of household care products, including toilet cleaners ...

Medicated Skincare - US

“Medicated skincare product sales are expected to grow steadily in the coming years. Market players can accelerate growth by delivering new product benefits, expanding into new categories, addressing the needs of consumers with chronic skin conditions, and increasing their engagement of Hispanic and Asian consumers.”

– Gabriela Elani, Home ...

First Aid - US

“While the first aid market experiences steady sales, growth is limited because consumers tend to use products only when they have an injury. There are opportunities to increase ownership among growing population groups, which could help to boost sales in the coming years.”

– Emily Krol, Health and Wellness ...

Professional Cosmetic Services - US

“While growth in the professional market appears to be steady, declining interest in services among an aging population could be problematic. Nonetheless, concerns about looking older are pervasive and suggest opportunities for personal care products that bridge the gap between the retail and professional markets.”

November 2014

Household Surface Cleaners - US

“While consumers are as time-pressed as ever, housecleaning remains a priority, a task that can provide a sense of accomplishment or play an important role in protecting a family’s health. Opportunities exist for surface cleaners that help consumers clean their homes efficiently and safely.”

– John Owen, Senior Household ...

Beauty and Personal Care Packaging Trends - UK

Hard Surface Cleaners - UK

“The convenience culture has had a big impact on the market for hard surface cleaners, with an increasing emphasis being placed on easier to use and time-saving products, as well as more convenient packaging. With an ageing population and increasing time pressures in people’s lives, convenient formats will continue to ...

Water Filtration - US

Household and Personal Care - International

“First-and-foremost, packaging needs to be practical, however, the in-home longevity offered from the BPC (Beauty and Personal Care) category adds greater potential for companies to focus on the aesthetics of their products in order to add value; raising their profile with impressionable young Millennials in particular. Further opportunities exist in ...

“Water filtration market sales are struggling, with further declines expected in the coming years. Companies will need to address the issue of filter replacement, convince consumers that these products are essential, and better engage Asian, Hispanic, and Black consumers to reinvigorate the category.”

– **Gabriela Elani, Home & Personal ...**

Suncare - UK

“The suncare category is largely dependent on the weather, and with a wet summer in 2014, the category is predicted to decline in value by 8%. This offers opportunities for brands to advertise in the winter or position products outside the summer season. Innovations in multi-functional products, as well as ...

Sun Protection and Sunless Tanners - US

“Suncare brands are challenged to overcome the seasonal usage habits and price-driven mentality of category shoppers. Nonetheless, consumers are demanding convenience, performance, and natural ingredients from their sun protection products, creating opportunities for brands to increase usage and boost sales.”

– **Shannon Romanowski, Senior Beauty and Personal Care Analyst**

October 2014

Consumers and the Economic Outlook: Quarterly Update - UK

“The revival in confidence has stalled. Although the economy is picking up speed, the population as a whole isn’t feeling the benefit of the recovery. People are as likely to say that they feel worse off than they did a year ago as they are to say that their finances ...

Ranges, Ovens, Cooktops and Microwaves - US

“While external economic factors are lifting the category as a whole, manufacturers and retailers can gain competitive advantage by catering to a wide variety of lifestyle needs. For many, especially aging Boomers, healthy, fresh eating is an increasingly compelling concern. Younger adults, on the other hand, may see a new ...

Cleaning Habits of Young Adults - UK

“With independence, in terms of moving away from the parental home, comes greater responsibility for household cleaning matters, so this is an important time for household care brands to engage with young adults through communications about the latest time-saving cleaning products or equipment, as well as advice and ideas on ...

Men's Toiletries - UK

“Post-recession, the male toiletries consumer remains intent on saving money on day-to-day purchases, and fashion trends continue to stunt certain markets such as shaving and hair removal. As a result the market has plateaued, however a number of opportunity areas exist for brands such as catering to a tween audience ...

Personal Care Consumer - US

“Personal care consumers are becoming more informed and skeptical, and are demanding transparency,

Men's Personal Care - US

“The men’s personal care category is expected to grow steadily due to men’s continued reliance on personal

Household and Personal Care - International

simplicity, and efficacy when shopping for and using personal care products.”

– **Shannon Romanowski, Senior Beauty and Personal Care Analyst**

care staples, such as APDO and shaving products, which have traditionally been segmented by gender. Companies can accelerate market growth by encouraging men to trade up to male-specific products that offer them new ...

September 2014

Household Cleaning Equipment - US

"While familiar, tried-and-true the cleaning tools form a foundation for the mature household cleaning equipment market, innovation is essential to driving growth or gaining market share. Consumers who do housecleaning are open to new ideas that deliver better results and that make the task itself more satisfying."

Vitamins, Minerals and Supplements - US

"Vitamins, minerals, and supplements have historically had strong sales, as this was an easy to make up for 'less than perfect' diets. However, the market is up against several challenges, including increasing consumer skepticism about the efficacy of VMS products. Introducing products with more customized appearance boosting claims or lower-dose ...

Shaving and Hair Removal Products - US

"Today's shaving and hair removal product consumer wants convenience and economy. Although the biggest innovations came in cartridge razors, the only segment to grow in the last two years was disposable razors, as consumers demonstrate a continual willingness to use products that are "good enough" and affordable, rather than the ...

Pest Control and Repellents - US

"Pest control sales are expected to grow steadily in the next few years. However, market players can accelerate category growth by increasing consumers' use of insect repellents, addressing concerns over chemical content, and by encouraging consumers to be more proactive in how they manage pest issues in their homes." ...

Household Cleaning Equipment - UK

"The increasing popularity of steam cleaners poses a potential threat to traditional cleaning equipment, with consumers favouring their ability to rid the house of germs without resorting to hefty chemicals. Traditional cleaning equipment brands now have an opportunity to respond to this challenge, either by creating more products that are ...

Vitamins and Supplements - UK

"Although the top reason for taking vitamins/supplements is generic, the rise in value sales of vitamins/supplements specifically for men and women suggests that consumers want a degree of personalisation, offering opportunities for the market. Driving further segmentation within demographic groups could be a way to encourage growth. In ...

Men's and Women's Shaving and Hair Removal - UK

"Retail value sales in the shaving and hair removal market stagnated in 2013; however, a focus on new product innovation has seen the category return to growth. Expanding into new and niche areas such as male body hair removal, laser and IPL (Intense Pulsed Light) home devices among others presents ...

August 2014

Home Laundry Products - US

“While overall sales of home laundry products remain weak, opportunities exist in all segments for brands that tap into the emotional importance that consumers place on getting the job done right.”

– John Owen, Senior Household Analyst

Air Care - US

“Though air care products enjoy a relatively high incidence of use, category sales have fluctuated in recent years and were flat during 2013-14. Consumers approach shopping the category with a cost-savings mindset and this has kept growth tempered. Continued integration of added functional benefits as well as new product innovations ...

Diabetes - US

“The percentage of Americans who suffer from diabetes (type 1 and type 2) has increased from 5.1% in 1997 to 9.3% in 2013. While this presents a large market of consumers for products and services specifically aimed to treat diabetes, it also indicates a need for education and ...

Home Laundry Products - UK

“More sophisticated versions of laundry capsules coming onto the market, such as Ariel 3in1 Pods and Persil Dual Action Capsules with liquid and powder detergent, are boosting this format’s share of the laundry detergents market. The effective removal of stains is the most important factor likely to determine product choice ...

July 2014

Gastrointestinal Remedies - US

“GI remedy sales are expected to remain flat in the coming years. To boost sales and address consumer tendency to not treat or use alternative remedies, companies must look to brand extension within the natural realm, improve consumer education, and leverage OTC remedies as a way to combat and prevent ...

Washers and Dryers - US

“Bolstered by continued modest improvement in the economy and a strengthening housing market, sales of washers and dryers have turned in solid sales performance since the end of the recession, rising to an estimated \$13.1 billion in 2014.”

– John Owen, Senior Household Analyst

OTC Contraceptives - US

“Despite an uptick in sales from 2013-14, the contraceptives market is still up against several challenges. An aging population puts downward pressure on the market, as usage declines among older, monogamous couples. Furthermore, competition from distribution of free or low-cost contraceptives cuts into sales.”

– Emily Krol, Health and ...

Feminine Hygiene and Sanitary Protection Products - UK

“Value sales in the sanitary protection, feminine hygiene and adult incontinence market are relatively protected due to the necessity of the products included. However, there is an opportunity for brands in each segment to now seek further growth by offering new products that address many of the concerns women have ...

Cookware - US

Consumers and The Economic Outlook - Quarterly Update - UK

Household and Personal Care - International

“The cookware market has continued to grow modestly due to consumers’ continued need for cookware and bakeware to facilitate meal preparation tasks. Accelerated category growth can be achieved by focusing on the emotional benefits of cooking as well as positioning cookware ownership as a means to enhance one’s skill and ...

“Although people are still more confident than they were in 2013, Mintel’s data suggests that they’re not entirely convinced by the economic revival. Across all three key measures (current situation, impact of the slowdown and how they expect their finances to fare over the next year), sentiment was slightly more ...

Air Care - UK

“Nearly nine out of 10 people use at least one type of air freshener at home but significant scope exists to encourage people to use a wider range of products and use them more regularly, such as for scenting more rooms or using air care products for a wider variety ...

The Private Label Healthcare Consumer - UK

“Improving financial situations could see people go back to branded products, after using lower-priced private label products during tough economic times. Growth of private label is therefore reliant on competitive pricing and innovations, in both product and packaging.”

June 2014

Cleaning the House - US

“Housecleaners may be looking to simplify their approach to housecleaning, but a clean and healthy home is still an important goal. Brands can uncover new opportunities for growth by helping housecleaners clean effectively in every room of the house and encouraging more family members to get involved.”

– John ...

Cleaning the House - UK

“Focusing on not just highlighting the attributes of cleaning products but also showing families doing the cleaning together could help to inject more life into an advertising campaign and at the same time increase engagement with a cleaning brand.”

Analgesics - US

“While sales of analgesics are increasing, the market is still up against a few challenges. A high degree of brand loyalty makes it difficult to get consumers to try new brands. Alternatively, opportunities for innovation present new usage occasions to grow market sales.”

– Emily Krol, Health and Wellness ...

Analgesics - UK

“The analgesics market benefitted from the strong marketing and product innovation output in 2013, as well as a strong performance by the topical analgesics segment. However, a battle still remains as consumers increasingly seek cheaper own-label products over those produced by well-known brands, due to the value they offer.”

Pet Supplies - US

“Pet supply sales are expected to grow steadily in the coming years. To boost sales and stave off competition from private label and nontraditional marketers, companies must combat concerns regarding product safety, improve pet owner engagement, harness the power of the Millennial mom, and develop lifestyle products that resonate with ...

Body, Hand and Footcare - UK

“Despite older people being the most likely to agree that moisturising the body is important, actual usage of body care products is low amongst the over-55s. The low usage of anti-ageing products amongst this group suggests that ageing skin has other needs which are currently under-represented in new product development ...

May 2014

Dishwashing Products - US

“The dishwashing products category has turned in better sales performance than most other household product categories over the past five years. Still there are opportunities to accelerate sales further by placing greater emphasis on the versatility of dishwashing liquids and the long-term value of dish care.”

- John Owen, Senior ...

Feminine Hygiene and Sanitary Protection Products - US

“Growth of feminine care products has been minimal in recent years, as the market is up against several challenges. Women are having fewer, lighter periods, contributing to declining usage of sanitary protection, specifically tampons. However, an aging population and increased interest in cleansing products bodes well for the category ...

Oral Care - UK

“Although a high proportion of the population visit the dentist, there remains a large proportion who do not do so, as well as a large proportion of parents who do not take their children to the dentist, suggesting missed opportunities for product endorsements. Despite the rise in products designed for ...

Oral Care - US

“Oral care sales are expected to grow modestly into 2018. However, there are ways for companies and brands to accelerate sales growth, which include influencing consumers to adopt more complex oral care routines, provide better outreach to underserved consumer segments, and grow toothbrush sales.”

Dishwashing Products - UK

"As well as encouraging more people to use dishwashers, the other main way of growing the value of the market is through persuading shoppers to trade up to more premium products. In hand dishwashing the best opportunities lie in the continued development of new fragrances and products that bridge the ...

April 2014

Cough, Cold, Flu and Allergy Remedies - US

“Despite increasing sales, the cough, cold, flu, and allergy market is up against several challenges. Most consumers seek to prevent getting sick, lessening the need for remedies to treat their ailments. Additionally, it is difficult to predict the severity of a given cold or flu season. Providing ways to help ...

Shampoo, Conditioner and Hairstyling Products - US

“The haircare category has experienced steady gains, though sales of styling products and treatments have

Haircare - UK

“While the haircare markets remain in growth, the pace has slowed in 2013 as consumers turn to savvier shopping methods to secure the cheapest prices, and scientific as well as technological advancements cause a cannibalisation of product needs.”

Disposable Baby Products - US

“Disposable baby product sales are expected to be stagnant to declining into 2018. To boost sales and stave off competition from private label, companies and

Household and Personal Care - International

struggled. Styling products and treatments that engage men and an aging population as well as reinforce healthy looking hair should help boost segment sales.”

The Private Label Household Care Consumer - UK

“The finding that such large proportions of people have noticed improvements to own-label household care products in terms of quality and selection in recent years gives grounds for optimism, as does the number of people who think further improvements would tempt them to buy more own-label versions of products. Raising ...

brands should consider expanding the current category and better engage Hispanic parents.”

March 2014

Refrigerators, Freezers, and Dishwashers - US

“While an improving economy and housing market is driving sales for the market as a whole, other factors give individual brands and retailers opportunities to gain competitive advantage. Superior owner protection is one such area. Another is finding a way to appeal to a new generation of appliance shoppers who ...

OTC Pediatrics - US

“After a series of product recalls, the OTC pediatrics market appears to have fully recovered. However, the market faces a few challenges to growth, including a declining population of households with children, and an overall movement toward prevention rather than treatment. Manufacturers and retailers that can meet parents’ unique needs ...

Hispanic Consumers and Household Products - US

“While Hispanic consumers are not a homogeneous group, one value that practically all share is their belief that personal appearance says a lot about a person. It is for this reason that they strive to take good care of their clothing and household. Brands that can partner with them to ...

Smoking Cessation Products - US

“E-cigarettes are the latest threat to the beleaguered smoking cessation products’ market. Prior to the rapid arrival and use of e-cigarettes, the fast-following introduction by private label manufacturers of every new product innovation launched by national brands helped commoditize the market and erode dollar sales growth. Future innovation should focus ...

Black Consumers and Household Products - US

“Maintaining a clean home is important to Black consumers. A clean home is direct reflection of what others think about them, and a clean home means a healthy family. Black consumers are all about prevention, and rely on products that have ingredients to help remove germs and odors. Blacks teach ...

Grilling and Barbecuing - US

“The grilling category is unique in that, for many adults, it is strongly associated with positive memories and emotions of cookouts past. Those who purchase a grill are not just buying an appliance upon which they can prepare food; they are buying it for the experiences they can have through ...

Household and Personal Care - International

Children's OTC - UK

“The market has been impacted by parental reluctance to treat their child without professional help as well as reduced innovation. Encouraging parents to treat their children at home, by offering better advice, as well as raising their confidence in brands by better engaging with them using social media could encourage ...

Babies' and Children's Personal Care Products, Nappies and Wipes - UK

“The disposable nappy and personal care segments were the worst performers in the market in 2013. Encouraging consumers to switch back to brands, and move away from savvy shopping techniques will be essential for returning the categories to growth.”

Attitudes Towards Germs - UK

“Continued growth in sales of germ-killing products will come from giving younger people in particular more information on hygiene and germ hotspots, as well as through promoting specific products as being better for use on surfaces coming into contact with food. Brands also have an opportunity across the wider household ...

February 2014

Household Paper Products - US

“In spite of low overall sales growth and universal household penetration, the household paper market holds opportunities for brands that emphasize quality and performance and that explore ideas that make it easier for consumers to use paper products in a wider array of occasions. At the same time, sustainability is ...

Household Paper Products - UK

“While their position as essential household items means that sales of household paper products are protected to a certain extent, a high level of promotional activity by brands and consumer determination to get the best deal have led to a decline in value sales. Brands looking to bolster sales of ...

Soap, Bath and Shower Products - UK

“Lifestyle factors present long-term considerations for the soap, bath and shower market with bathing habits changing. A daily shower is becoming increasingly popular as consumers move away from time- and money-consuming bathing, despite its relaxing appeal.”

Smoking Cessation and E-cigarettes - UK

“The rise in popularity of E-cigarettes has hampered growth in the value of the smoking cessation market, which saw modest growth of less than 2% in 2013. Although E-cigarettes are largely marketed as an alternative to smoking, smokers have been using them to cut down or quit smoking. Changes in ...

January 2014

Household Care Packaging Trends - US

“Innovations in packaging and product form that simplify everyday household chores stand a good chance of capturing the attention of category shoppers. Results, however, are just as important as convenience.”

Pharmaceuticals: The Consumer - US

“The patent cliff, as well as a push toward consumers being more proactive about their health, has contributed to a decline in sales of pharmaceutical drugs. However, the ACA will provide more people with health insurance



Household and Personal Care - International

coverage, likely growing the market of prescription drug users.”

Deodorants and Bodysprays - UK

“This is a category where brand name prevails and own-label is held with scepticism. With long-lasting being the most important product attribute, consumers are more trusting of brands to deliver long-lasting protection. However, products not lasting as long as they claim to is the biggest product frustration, suggesting that using ...

Household Care Packaging Trends - UK

“Packaging is central to both how household care products are used and how they communicate their benefits to consumers, and the latter includes the promotion of technologies and solutions that encourage greener behaviour. Younger people are particularly likely to voice green or ethical sentiments but not act upon these beliefs ...