

Shaving and Hair Removal - US - October 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.



"Current sales in the shaving and hair removal category remain sluggish, due to the competitive landscape and value-driven nature of the category. Sales are expected to level off with minimal gains through 2020."

-
Rebecca Cullen
, Research Analyst

This report looks at the following areas:

- Category sales stagnant
- Millennials, Hispanics more inclined to use professional services
- Private label products outgain branded products

Sales of shaving and hair removal products remain stagnant due to the competitive nature of the category and a general price-driven approach among shoppers. Still, growth opportunities exist in the more than \$4 billion category, including shaving products that promote skin health and professional-quality results. Focusing on engaged demographic groups, such as younger adults and Hispanics, could also generate results.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
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

Shaving and Hair Removal - US - October 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

Overview

What you need to know

Definition

Executive Summary

The issues

Category sales stagnant

Figure 1: Total US sales and fan chart forecast of shaving and hair removal, at current prices, 2010-20

Millennials, Hispanics more inclined to use professional services

Figure 2: Use of any professional services, by Millennials and Hispanic origin, July 2015

Private label products outgain branded products

Figure 3: Top three disposable razor purchase influencers, any rank, July 2015

The opportunities

Engage adults aged 25-44, Hispanics

Figure 4: Any use of select at-home shaving products, by 25-34 and 35-44 age groups and Hispanic origin, July 2015

Focus on skin benefits and improved performance from shaving prep products

Figure 5: Select purchase influencers for shaving prep products, July 2015

Highlight precision and efficiency beyond razor function

Figure 6: Any interest or use in select shaving products, July 2015

What it means

The Market – What You Need to Know

Category continues to struggle

Non-disposables driving growth of the category

Category influenced by economic trends, Hispanic consumers

Market Size and Forecast

Historic and projected sales performance of shaving and hair removal products

Figure 7: Total US sales and fan chart forecast of shaving and hair removal, at current prices, 2010-20

Figure 8: Total US sales and forecast of shaving and hair removal products, at current prices, 2010-20

Market Breakdown

Non-disposable razors boost market while refill cartridges struggle

Figure 9: Total US retail sales of shaving and hair removal products, by segment, at current prices, 2013 and 2015

Figure 10: Share of total US retail sales of shaving and hair removal products, by segment, at current prices, 2015

Consumers migrate from traditional retail channels

Figure 11: Total US retail sales of shaving and hair removal products, by channel, at current prices, 2013 and 2014

Market Perspective

Professional services supplemented by at-home products

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Shaving and Hair Removal - US - October 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 12: Product usage, among total population and those that get professional services, July 2015

Consumers allocate dollars to other personal care segments

Figure 13: Personal care spending by category, 2014

At-home devices threaten the market

Figure 14: Trial and interest in at-home hair removal devices, by 18-34 and Hispanic origin, July 2015

Market Factors

Improving economy benefits at-home and professional market

Figure 15: Usage of any razor, shaving prep, and hair removal products, by household income, July 2015

Hispanic population grows

Figure 16: Use of select shaving products, by Hispanic origin, July 2015

Marriage rates decline

Figure 17: Men's attitudes toward facial hair and shaving, by marital status, July 2015

Key Players – What You Need to Know

MULO shaving and hair removal sales tick down

Substantial engagement is crucial in the saturated market

Products that offer more than affordability stand to gain

Manufacturer Sales of Shaving and Hair Removal Products

Competitive landscape, price-driven shoppers lead to stagnant growth

P&G sees success with non-disposable product innovation

Manufacturer sales of shaving and hair removal products

Figure 18: MULO sales of shaving and hair removal products, by leading companies, rolling 52-weeks 2014-2015

What's Working?

Empowering campaign from Venus redefines female stereotypes

Figure 19: Gillette Venus #UseYourAnd video campaign, January 2015

Subscription services gain momentum

Figure 20: Any use or interest in shaving subscription services, by gender and age, July 2015

Gentle, skin nourishing shaving prep benefiting segment

Figure 21: MULO sales of select shaving prep products, 52-weeks ending July 12, 2015

Private label outgains branded products

What's Struggling?

Lack of engagement through marketing

Figure 22: Select appearance influencers, by age, July 2015

Figure 23: MULO Sales of Select Schick Cartridge and Cartridge Razors, rolling 52-weeks ending July 12, 2015

Figure 24: Schick Intuition print ad, August 2015

Numerous product launches flood a saturated shaving prep segment

Figure 25: Share of shaving and hair removal launches, by segment, 2015*

What's Next?

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Shaving and Hair Removal - US - October 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.

Features that improve function

Figure 26: Interest in select razor innovations, July 2015

Creative retailing, subscription models poised to gain

Body-part specific tools gaining traction

Figure 27: MULO sales of P&G's Gillette Body Razor, rolling 52-weeks ending July 12, 2015

Figure 28: Any use or interest in razors for specific body areas, by female and age, July 2015

Convenient formats could increase use of depilatories

Figure 29: Nair Brazilian Spa Clay and Bliss 'Fuzz' Off

Figure 30: Veet Botanical Inspirations Warm Sugar Wax and Sally Hansen Ouch-Relief Stripless Hard Wax

The Consumer – What You Need to Know

Half of adults use disposable razors

Shaving prep products promoting skin benefits stand to gain

Depilatories struggle with negative perceptions

Younger adults most engaged in hair removal category

Shift in attitudes among younger men about facial hair

Usage and Purchase Influencers of Razors

Disposable razors are most popular choice among adults

Figure 31: Use of razors, by gender, July 2015

Hispanics over index use of most razors

Figure 32: Use of razors, by Hispanic origin, July 2015

Purchase motivators vary by razor type

Figure 33: Top five cartridge razor purchase influencers, any rank, July 2015

Figure 34: Top five disposable razor purchase influencers, any rank, July 2015

Interest in Razor Features

Emphasize function and dual action features

Figure 35: Gillette Venus Swirl Cartridge razor

Figure 36: Any use or interest in select razor innovations, July 2015

Younger men seek personalized and simplified experience

Figure 37: Any interest or use in select shaving products, by male and age, July 2015

Hispanic, Black consumers seek performance and quality

Figure 38: Any interest or use in select shaving product innovations, by race and Hispanic origin, July 2015

Usage and Purchase Influencers of Shaving Prep Products

Shaving cream dominates format use

Figure 39: Use of shave prep products, by gender, July 2015

Figure 40: Use of shaving prep products, by household income, July 2015

Hispanic, White adults heavier users of shaving prep products

Figure 41: Shaving prep product usage, by race and Hispanic origin, July 2015

Women seek hydrating benefits, men seek calming features

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Shaving and Hair Removal - US - October 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 42: Select appearance related concerns, by gender, July 2015

Figure 43: Select pre and post shaving purchase influencers, by gender, July 2015

Purchase influencers differ between pre and post shave products

Figure 44: Shaving prep purchase influencers, by product, July 2015

Figure 45: Correspondence analysis – Shaving prep purchase influencers, July 2015

Usage and Purchase Influencers of Hair Removal Products

Women, adults aged 25-34 more inclined to use hair removal products

Figure 46: Use of hair removal products, by gender and 25-34 age group, July 2015

Hair removal users are motivated by skincare benefits

Figure 47: Top five hair removal cream purchase influencers, any rank, July 2015

Millennials influenced by product reviews

Figure 48: Select hair removal cream purchase influencers, by Millennial Generation, July 2015

Use of Professional Services

Adults aged 25-34 report higher usage of professional services

Figure 49: Select professional services used, by gender and by 25-34 age group, July 2015

Impact of Hispanic origin on product usage

Figure 50: Use of professional services, by race and Hispanic origin, July 2015

Attitudes toward Hair Removal and Appearance Influencers

Younger men more tolerant of facial hair

Figure 51: Select men's attitudes toward facial hair, by age, July 2015

Hispanic men invested in their appearance

Figure 52: Select men's attitudes toward facial hair, by race and Hispanic origin, July 2015

Marketing messages establishing a personal connection stand to gain

Figure 53: Select appearance influencers, by age, July 2015

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Appendix – Market

Figure 54: Total US sales and forecast of shaving and hair removal products, at inflation-adjusted prices, 2010-20

Figure 55: Total US retail sales and forecast of refill cartridges, at current prices, 2010-20

Figure 56: Total US retail sales and forecast of disposable razors, at current prices, 2010-20

Figure 57: Total US retail sales and forecast of non-disposable razors, at current prices, 2010-20

Figure 58: Total US retail sales and forecast of shaving cream, at current prices, 2010-20

Figure 59: Total US retail sales and forecast of depilatories, at current prices, 2010-20

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Shaving and Hair Removal - US - October 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 60: Total US retail sales of shaving and hair removal products, by channel, at current prices, 2010-15

Appendix – Key Players

Figure 61: MULO sales of non-disposable razors, by leading company and brands, rolling 52-weeks 2014 and 2015

Figure 62: MULO sales of disposable razors, by leading companies and brands, rolling 52-weeks 2014 and 2015

Figure 63: MULO sales of refill cartridges, by leading companies and brands, rolling 52-weeks 2014 and 2015

Figure 64: MULO sales of shaving cream, by leading companies and brands, rolling 52-weeks 2014 and 2015

Figure 65: MULO sales of depilatories, by leading companies and brands, rolling 52-weeks 2014 and 2015

Appendix – Consumer

Correspondence analysis methodology

Experian Simmons analysis

Figure 66: Types of shaving cream used, by select demographics, October 2014-June 2015

Figure 67: Forms of shaving cream used, by select demographics, October 2014-June 2015

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com