

Report Price: £1995.00 | \$2693.85 | €2245.17

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



This report looks at the following areas:

- Perfecting the ingredients
- Taking advantage of the desire for convenience
- The guidance challenge

"A continued decline in value sales of men's haircare and skincare is creating a challenging environment for both brands and retailers. Savvy shopping habits are putting downward pressure on prices in both categories, and men still favour a basic routine."

– Samantha Dover, Senior Beauty and Personal Care Analyst

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

арас +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



Report Price: £1995.00 | \$2693.85 | €2245.17

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

Products covered in this Report

Men's Haircare

Men's Skincare

Executive Summary

The market

Decline in value sales forecast to continue

Figure 1: Best- and worst-case forecast for retail value sales of men's haircare and facial skincare, 2014-24

Mass-market brands are suffering from intense price competition

Figure 2: Retail value sales of men's haircare and facial skincare, by price positioning, 2018-19

Grocers are losing out to retailers that offer better value

Figure 3: Retail share of consumer expenditure on men's haircare and skincare, 2019

Companies and brands

Just for Men is gaining ground

Figure 4: Retail value sales of mass-market men's haircare, by brand, 2019

Bulldog is outperforming

Figure 5: Retail value sales of mass-market men's facial skincare, by brand, 2019

Dip in NPD driven by a decline in haircare innovation

Figure 6: New product launches in men's haircare and facial skincare, by category, 2015-19

The consumer

Shampoo drives haircare usage

Figure 7: Overall usage of haircare products, December 2019

Soap drives skincare usage

Figure 8: Overall usage of facial skincare products, December 2019

Men are concerned about hair loss

Figure 9: Hair concerns, December 2019

Dryness is the top skin concern

Figure 10: Facial skin concerns, December 2019

Price and quality are priorities

Figure 11: Haircare and facial skincare purchase drivers, December 2019

Personalisation could be used to encourage value growth

Figure 12: Usage of and interest in haircare and skincare products and services, December 2019

More innovation that focusses convenience would resonate

Figure 13: Choice factors when purchasing haircare and skincare products, December 2019

Men are willing to shop around for low prices

Figure 14: Haircare and facial skincare behaviours, December 2019

BUY THIS REPORT NOW



Report Price: £1995.00 | \$2693.85 | €2245.17

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

W	nat we think
Issu	es and Insights
Pe	rfecting the ingredients
Th	e facts
Th	e implications
Та	king advantage of the desire for convenience
Th	e facts
Th	e implications
Th	e guidance challenge
Th	e facts
Th	e implications
The	Market – What You Need to Know
Ha	ircare category hit by savvy shopping habits
Ba	sic routines are holding back skincare sales
Pr	estige brands have fared better
Tr	aditional channels are losing share
Br	ands need to engage older men
En	vironmental concerns are taking hold
Br	ands can tap into grooming trends
Mark	et Size and Forecast
Sp	ending on haircare declined 3% in 2019 Figure 15: Retail value sales of men's haircare, 2014-24
Ha	ircare set to see long-term decline Figure 16: Best- and worst-case forecast for retail value sales of men's haircare, 2014-24
Sp	ending on facial skincare declined 8% in 2019
	Figure 17: Retail value sales of men's facial skincare, 2014-24
Me	en's facial skincare is on a downward trajectory
	Figure 18: Best- and worst-case forecast for retail value sales of men's facial skincare, 2014-24
Fo	recast methodology
Mark	et Segmentation
Pr	estige haircare brands are outperforming Figure 19: Retail value sales of men's haircare, by price positioning, 2018-19
De	cline in skincare sales driven by mass-market Figure 20: Retail value sales of men's facial skincare, by price positioning, 2018-19
Chan	nels to Market
Co	nvenience and price impact buying behaviours Figure 21: Retail share of consumer expenditure on men's haircare and skincare, 2018-19
	scount and online-only retailers gain ground

BUY THIS REPORT NOW



Report Price: £1995.00 | \$2693.85 | €2245.17

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

Market Drivers

Population growth could boost demand

Figure 22: UK male population projections, by age, 2018-28

Brands that lack age diversity are falling out of favour

Figure 23: Diversity issues that discourage usage of BPC brands, by men, August 2019

Online is becoming more important

Figure 24: Channels used to purchase BPC products in the last 12 months, by men, October 2019

Retailers can benefit from targeting men more proactively

Figure 25: Types of retailer used to purchase BPC products in the last 12 months, by men, October 2019

Young men are going green

Figure 26: Purchase of eco-friendly and regular BPC products in the last 12 months, by men, November 2019

Premiumisation will require proof

Figure 27: Brand types most commonly used by men, by category, October 2019

Target young men with colourant aftercare

Figure 28: Usage of any at-home hair colourant product in the last 12 months amongst men, by age, January 2018 and October 2019

Tap into the desire for tanned skin

Figure 29: Attitudes towards sunless tanning products, by men, October 2019

Companies and Brands – What You Need to Know

Leading haircare brands are struggling

Mixed performance seen in the skincare category

A decline in haircare NPD subdues demand

Uplift in skincare NPD fails to boost spending

Rise in digital advertising aligns with online growth

NIVEA Men leads on trust

Market Share

Mixed performance amongst leading haircare brands

Figure 30: Retail value sales of mass-market men's haircare, by brand, 2018-19

Head & Shoulders battles with increased competition

Leading players are challenged by newer skincare brands

Figure 31: Retail value sales of mass-market men's facial skincare, by brand, 2018-19

Bulldog also gains strength with green positioning

Launch Activity and Innovation

Haircare NPD declined in 2019

Figure 32: New product launches in the men's haircare category, by sub-category, 2015-19

Solid formats will appeal to eco-conscious men

Figure 33: Example of a men's haircare product launch with a solid format, 2019

Product relaunches take a bigger share of haircare NPD

Figure 34: New product launches in the men's haircare category, by launch type, 2015-19

BUY THIS REPORT NOW



Report Price: £1995.00 | \$2693.85 | €2245.17

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

Brands target men with anti-ageing haircare Figure 35: Examples of men's haircare product launches with anti-ageing claims, 2019 Ethical claims are on the rise Figure 36: Fastest growing claims in the men's haircare category, 2018-19 Dermatologically tested claims come to forefront Figure 37: Examples of men's haircare product launches with dermatologically tested claims, 2019 Proctor & Gamble dominates haircare NPD Figure 38: New product launches in the men's haircare category, by ultimate company, 2019 Harry's looks to disrupt the haircare and skincare market Figure 39: Examples of Harry's men's haircare and skincare product launches, 2019 Skincare NPD increases in 2019 Figure 40: New product launches in the men's facial skincare category, by sub-category, 2015-19 Herbivore targets bearded men Figure 41: Example of Herbivore's men's beard product launches, 2019 Putting eco-friendly packaging front and centre Figure 42: New product launches in the men's facial skincare category, by launch type, 2015-19 Gluten-free claims come to the forefront Figure 43: Fastest growing claims in the men's facial skincare category, 2018-19 Prestige brands focus on speedy multifunctional solutions Figure 44: Examples of men's facial skincare product launches with time/speed claims, 2019 L'Oréal and LVMH up the ante, but relaunches dominate Figure 45: New product launches in the men's facial skincare category, by ultimate company, 2019 Blurring the line between skincare and makeup Figure 46: Examples of men's tinted moisturiser product launches, 2019 Expanding the category with treatment products Figure 47: Examples of men's facial mask product launches, 2019 **Advertising and Marketing Activity**

Advertising expenditure in haircare lags women's category

Figure 48: Total above-the line, online display and direct mail advertising expenditure on men's haircare, 2017-19

Dr Kurt Wolff dominates haircare advertising

Figure 49: Total above-the line, online display and direct mail advertising expenditure on men's haircare, by advertiser, 2019

Digital advertising sees a rise in facial skincare

Figure 50: Total above-the line, online display and direct mail advertising expenditure on men's facial skincare, 2017-19

L'Oréal leads facial skincare adspend in 2019

Figure 51: Total above-the line, online display and direct mail advertising expenditure on men's facial skincare, by advertiser, 2019

Nielsen Ad Intel coverage

Brand Research

Brand map

Figure 52: Attitudes towards and usage of selected brands, February 2020

BUY THIS REPORT NOW



Report Price: £1995.00 | \$2693.85 | €2245.17

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

Key brand metrics Figure 53: Key metrics for selected brands, February 2020

Brand attitudes: NIVEA Men is most trusted Figure 54: Attitudes, by brand, February 2020

Brand personality: Clinique has an air of exclusivity Figure 55: Brand personality – macro image, February 2020

L'Oréal Men Expert thought to be innovative Figure 56: Brand personality – micro image, February 2020

Brand analysis

NIVEA Men benefits from its strong brand awareness Figure 57: User profile of NIVEA Men, February 2020

L'Oréal Men Expert is also well known

Figure 58: User profile of L'Oréal Men Expert, February 2020

No7 Men more popular amongst younger men

Figure 59: User profile of No7 Men, February 2020

Clinique for Men is worth paying more for

Figure 60: User profile of Clinique for Men, February 2020

TONI&GUY Men struggles with low usage Figure 61: User profile of TONI&GUY Men, February 2020

Harry's has successfully differentiated its brand

Figure 62: User profile of Harry's, February 2020

The Consumer – What You Need to Know

Simple regimes remain firmly in place

Men are most concerned about hair loss and dry skin

Quality is almost as important as price

Adding a personal touch could encourage sales

Demand for multifunctional products remains strong

Shoppers are price-conscious

Usage of Haircare Products

Haircare routines are simple

Figure 63: Frequency of haircare product usage, December 2019

Expand conditioner ranges to boost sales

Figure 64: Overall usage of haircare products, December 2019

Scalp treatments remain an untapped opportunity

Target older men with scalp care messages

Figure 65: Overall usage of haircare products, by age, December 2019

Usage of Facial Skincare Products

Facial skincare more frequently used than haircare

BUY THIS REPORT NOW



Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 66: Frequency of facial skincare product usage, December 2019

Soap usage lends itself to NPD in solid skincare

Figure 67: Overall usage of facial skincare products, December 2019

Target young men with skincare bundles

Figure 68: Overall usage of facial skincare products, by age, December 2019

Hair and Skin Concerns

Hair loss is the primary concern

Figure 69: Hair concerns, December 2019

Young men are more worried about their hair health

Figure 70: Hair concerns, by age, December 2019

Offering more targeted skincare solutions might appeal

Figure 71: Facial skin concerns, December 2019

Skin ageing is a universal concern

Figure 72: Facial skin concerns, by age, December 2019

Haircare and Skincare Purchase Drivers

Most men buy their own products

Figure 73: Purchase of haircare and facial skincare products, December 2019

Men need reassurance that premium brands offer quality

Figure 74: Haircare and facial skincare purchase drivers, December 2019

An opportunity to target men with clean positioning

Ease-of-use is important to older men

Figure 75: Haircare and facial skincare purchase drivers, by age, December 2019

Usage of and Interest in Haircare and Skincare Products and Services

Demand for personalisation is strong

Figure 76: Usage of and interest in haircare and skincare products and services, December 2019

Interest in supplements gives brands opportunities to expand

Interest in male makeup remains niche

Genderless products are popular with young men

Figure 77: Usage of and interest in genderless/unisex haircare and skincare products, by age, December 2019

Active grooming remains an untapped opportunity

Figure 78: Usage of and interest in active haircare and skincare products, by age, December 2019

Choice Factors When Purchasing Haircare and Skincare

Multipurpose products appeal to those looking for simplicity

Figure 79: Choice factors when purchasing haircare and skincare products, December 2019

Education needed to boost interest in active ingredients

Natural ingredients appeal to men of all ages

Figure 80: Choice factors when purchasing haircare and skincare products, by age, December 2019

Young men want protection from the elements

BUY THIS REPORT NOW



Report Price: £1995.00 | \$2693.85 | €2245.17

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

Haircare and Skincare Behaviours

Savvy shopping behaviours are ingrained

Figure 81: Haircare and facial skincare behaviours, December 2019

The importance of delivering guidance in a way that resonates

Brands with a conscience will be best placed to succeed

Bearded men are taking more notice of product ingredients

Figure 82: Men's Haircare and Skincare – CHAID – Tree output, December 2019

Figure 83: Men's haircare and skincare behaviours - CHAID - Table output, December 2019

CHAID Methodology

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Appendix – Market Size and Forecast

Forecast methodology

Best- and worst-case forecast

Figure 84: Retail value sales of men's haircare and facial skincare, 2014-24

Figure 85: Best- and worst-case forecast for retail value sales of men's haircare and facial skincare, 2014-24

BUY THIS REPORT NOW