

# Shaving and Hair Removal: Inc Impact of COVID-19 - UK - April 2020

Report Price: £2195 | \$2995 | €2600

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:

However, consumers do show interest in added-value propositions, such as skincare benefits and personalisation, indicating NPD opportunities for brands in the longer term. We also expect to see renewed interest in sustainability and eco-friendly options in the wake of the COVID-19 crisis, which will open up new angles that brands can explore.

- The impact of COVID-19 on consumer behaviour and the Shaving and Hair Removal market.
- How the market will fare the post-COVID-19 slowdown
- The value of individual segments and brand performance in 2019
- Launch activity and consumer interest in innovation
- Hair removal behaviours amongst consumers and methods used

Although facial and body hair removal remained stable, the size of the shaving and hair removal category has declined for the fourth consecutive year in 2019 and is estimated to decline by a further 3.5% in 2020. The trend is driven by price-sensitive shopping behaviours as well as reduced frequency of hair removal, behaviours which will be amplified by the COVID-19 outbreak. The lockdown period will see hair removal routines relax, whilst price sensitivities will be heightened as household finances are squeezed.

However, interest in innovation is strong, indicating growth opportunities for brands to increase spend by tapping into consumer desire for personalisation as well as eco-friendly formats.



“The COVID-19 outbreak will accelerate the price-driven nature of this sector, meaning that a market that was already expected to be in decline will face an even greater short-term challenge.”  
– Emilia Tognacchini, Junior Research Analyst – 28th April 2020

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

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**
- **Key issues covered in this Report**
- **Products covered in this Report**

### EXECUTIVE SUMMARY

- **The market**
- **COVID-19 outbreak drives decline in value in 2020**  
Figure 1: UK central forecast for value sales of shaving and hair removal products (adjusted for COVID-19), 2014-24
- **Impact of COVID-19 on Shaving and Hair Removal**
- **Long-term impact of COVID-19 will be limited**  
Figure 2: Expected impact of COVID-19 on the shaving and hair removal category, short, medium and long-term, 27th April 2020
- **Companies and brands**
- **Market leaders see minor decline in shaving preparations and depilatories**  
Figure 3: Brand shares in the UK shaving preparations and depilatories market, year ending January 2020
- **Top brands face decline in razors and blades**  
Figure 4: Brand shares in the UK razors and blades market, year ending January 2020
- **NPD by own-label brands is increasingly competitive**  
Figure 5: New product launches in the UK shaving and depilatories market, by product type, 2016-19
- **The consumer**
- **Body hair removal remains stable**  
Figure 6: Hair removal areas – body, June 2018 and January 2020
- **The beard trend could be impacted by COVID-19**  
Figure 7: Hair removal areas – face, June 2018 and January 2020
- **Salon hair removal will be impacted by COVID-19**  
Figure 8: Places of hair removal, June 2018 and January 2020
- **Shaving is less popular with young women**  
Figure 9: Methods of hair removal, January 2020
- **Shaving frequency is in decline**  
Figure 10: Changes in usage of shaving products, January 2020
- **Reusable depilatory products can appeal to conscious consumers**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

Report Price: £2195 | \$2995 | €2600

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

Figure 11: Changes in usage of waxing/sugaring products and hair removal creams, January 2020

- **Price is a powerful purchase driver**

Figure 12: Purchase drivers for hair removal products, January 2020

- **Tidiness and hygiene motivate hair removal**

Figure 13: Reasons for removing body/facial hair, by gender, January 2020

- **Opportunity to explore new benefits**

Figure 14: Interest in hair removal innovations, January 2020

- **What we think**

**THE IMPACT OF COVID-19 ON THE SHAVING AND HAIR REMOVAL SECTOR**

- **Short, medium and long-term impact on the industry**

Figure 15: Expected impact of COVID-19 on the shaving and hair removal category, short, medium and long-term, 27th April 2020

- **Opportunities and Threats**

- **Long-term impact of COVID-19 will be limited**

- **An emotional need for community and co-operation**

- **Scientific expertise is back in fashion...**

- **...and the crisis will reinforce growing environmental concerns**

- **Impact on the market**

- **2020 will see an even bigger decline in value than previously expected**

Figure 16: UK central forecast for value sales of shaving and hair removal products (adjusted for COVID-19), 2014-24

- **Shifts in consumer behaviour**

- **Health and hygiene was a priority in the initial weeks of the outbreak**

Figure 17: Personal or family behaviour changes as a result of the COVID-19/coronavirus outbreak, 9th April – 16th April 2020

- **Overall BPC sees little change in spend**

Figure 18: Changes in spending habits on BPC, 20th March-16th April

- **Impact on key consumer groups**

- **16-24s will feel the pinch**

- **Priorities will shift for women**

- **Over-55s will become less engaged with hair removal**

- **Widespread use of facemasks could have a short-term impact on the category**

**What's included**

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

**Did you know?**

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit [store.mintel.com](https://store.mintel.com)

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

Report Price: £2195 | \$2995 | €2600

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

Figure 19: Usage of face mask in public as a result of the COVID-19/coronavirus outbreak, 28th February-1st April

- **Consumers will look to brands that helped the effort**
- **How a COVID-19 recession will reshape the industry**
- **Unemployment will impact discretionary spend**
- **Hangovers from the last recession will impact behaviours**
- **Impact on the marketing mix**
- **Traditional pricing models and distribution channels will continue to be challenged**
- **Marketing needs to emphasis community and mutual support**
- **Clean beauty will evolve**
- **COVID-19: UK context**

## ISSUES AND INSIGHTS

- **Gender neutrality represents an opportunity**
- **The facts**
- **The implications**
- **Personalisation based on skin and hair type appeals to consumers**
- **The facts**
- **The implications**

## THE MARKET – WHAT YOU NEED TO KNOW

- **Fourth year of consecutive decline**
- **Razors & Blades see further decline**
- **Groceries remain popular**
- **Ageing population poses challenges**
- **Body hair can be beautiful**
- **COVID-19 will impact routines**

## MARKET SIZE AND FORECAST

- **Fourth year of consecutive decline**

Figure 20: UK value sales of men's and women's shaving and hair removal products, 2014-19

- **Outlook in light of COVID-19**
- **Minimal impact in the short term by COVID-19**
- **2020 will see a bigger decline**

Figure 21: UK central forecast for value sales of shaving and hair removal products (adjusted for COVID-19), 2014-24

Figure 22: UK value sales of men's and women's shaving and hair removal products (adjusted for COVID-19), 2014-24

- **A category in decline pre-COVID-19**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

Report Price: £2195 | \$2995 | €2600

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

Figure 23: UK best- and worst-case forecast for value sales of shaving and hair removal products (pre-COVID-19 forecast), 2014-24

- **Forecast methodology**

## MARKET SEGMENTATION

- **Razors & blades see further decline**

Figure 24: UK retail value sales of men's and women's shaving products and depilatories, by segment, 2018-2019

- **NPD in formats could drive depilatories**

## CHANNELS TO MARKET

- **Groceries remain the preferred channel**

Figure 25: UK retail value sales of shaving and hair removal products, by outlet type, 2017-19 (est)

- **Discounters see the biggest decline**
- **Online sector could see growth**

## MARKET DRIVERS

- **Ageing population poses challenges to the category**

Figure 26: Trends in the age structure of the UK population, 2014-24

- **Body hair can be beautiful**

Figure 27: FFS advert, 2018

- **Consumers look for eco-friendly alternatives**
- **'Clean' beauty and transparency remain important**
- **COVID-19 will impact routines**

## COMPANIES AND BRANDS – WHAT YOU NEED TO KNOW

- **Market leaders see minor decline in shaving preps and depilatories**
- **Razor brands see decline in value**
- **NPD on the increase despite decline in category value**
- **The shaving and hair removal category embraces gender neutrality**
- **Advertising spend focuses on TV and digital media**
- **Brands talk about masculinity and mental health**
- **Newer brands resonate with those on higher incomes**

## MARKET SHARE

- **Market leaders see minor decline in value**

Figure 28: Brand shares in the UK shaving preparations and depilatories market, 2019-20

- **Top brands face decline in razors and blades**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

Report Price: £2195 | \$2995 | €2600

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

Figure 29: Brand shares in the UK razors and blades market, 2019-20

- **Cheaper brands gain visibility**

**LAUNCH ACTIVITY AND INNOVATION**

- **NPD on the increase despite decline in category value**

Figure 30: New product launches in the UK shaving and depilatories market, by product type, 2016-19

- **Shaving preparations see premium launches**

Figure 31: Examples of NPD in premium shaving preparation, 2019-20

- **Launch activity focused on range extensions**

Figure 32: New product launches in the UK shaving and hair removal market, by launch type, 2016-19

Figure 33: Examples of NPD in Superdrug hair removal products, 2019-20

- **Dermatologically tested options become more popular**

Figure 34: Top six fastest-growing claims in the UK shaving and hair removal market, 2017-19

- **Linking hair removal with skin-health**

- **The category embraces gender neutrality**

Figure 35: Examples of NPD in female hair removal products, 2018-19

Figure 36: Examples of NPD in unisex hair removal products, 2019-20

- **Carbon neutrality to boost sustainability**

- **Vegan is trendy**

- **Brands should go beyond botanicals**

Figure 37: The Body Shop softening shaving cream for men with maca root & aloe, 2019

- **Gillette leads NPD**

Figure 38: New product launches in the UK shaving and hair removal category, by top ultimate companies and others, 2019

Figure 39: Gillette SkinGuard Sensitive Razor, P&G, 2019

Figure 40: Examples of NPD in own-label shaving preparations, 2019

**ADVERTISING AND MARKETING ACTIVITY**

- **Advertising spend focuses on TV and digital campaigns**

Figure 41: Recorded above-the-line, online display and direct mail total advertising expenditure on shaving and hair removal products, by media type, 2019

**What's included**

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

**Did you know?**

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit [store.mintel.com](https://store.mintel.com)

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



Report Price: £2195 | \$2995 | €2600

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

- Gillette and Lynx bet on digital advertising**  
 Figure 42: Gillette SkinGuard shaving tutorials, 2019  
 Figure 43: Lynx Shavetutorials advert, 2019
- Advertising expenditure focuses on manual razors**  
 Figure 44: Recorded above-the-line, online display and direct mail total advertising expenditure on shaving and hair removal products, by product category, 2019
- P&G leads advertising expenditure**  
 Figure 45: Recorded above-the-line, online display and direct mail total advertising expenditure on shaving and hair removal products, by ultimate company, 2019
- Gillette and Harry's talk about masculinity**  
 Figure 46: Gillette "The Best A Man I Can get" Advert, 2019  
 Figure 47: Harry's "I am not afraid" Advert, 2019
- Nielsen Ad Intel coverage**

**BRAND RESEARCH – WOMEN'S**

- Brand map**  
 Figure 48: Attitudes towards and usage of selected brands, February 2020
- Key brand metrics**  
 Figure 49: Key metrics for selected brands, February 2020
- Brand attitudes: Boots Smooth Care offers good value**  
 Figure 50: Attitudes, by brand, February 2020
- Brand personality: Wilkinson Sword considered accessible**  
 Figure 51: Brand personality – macro image, February 2020
- FFS is seen as overhyped and indulgent**  
 Figure 52: Brand personality – micro image, February 2020
- Brand analysis**
- Boots Smooth Care mainly used by 16-44s**  
 Figure 53: User profile of Boots Smooth Care, February 2020
- Wilkinson Sword combines expertise and high quality**  
 Figure 54: User profile of Wilkinson Sword, February 2020
- FFS appeals to women with higher incomes**  
 Figure 55: User profile of FFS Friction Free Shaving, February 2020
- Avon Works popular among different age and socio-economic groups**  
 Figure 56: User profile of Avon Works, February 2020

**BRAND RESEARCH – MEN'S**

- Brand map**

**What's included**

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

**Did you know?**

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit	store.mintel.com
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

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

Figure 57: Attitudes towards and usage of selected brands, February 2020

- **Key brand metrics**

Figure 58: Key metrics for selected brands, February 2020

- **Brand attitudes: Harry's is worth paying more for**

Figure 59: Attitudes, by brand, February 2020

- **Brand personality: NIVEA Men perceived as accessible**

Figure 60: Brand personality – macro image, February 2020

- **King of Shaves considered youthful**

Figure 61: Brand personality – micro image, February 2020

- **Brand analysis**

- **NIVEA Men mainly popular among young men**

Figure 62: User profile of NIVEA Men, February 2020

- **Harry's resonates with men with higher incomes**

Figure 63: User profile of Harry's, February 2020

- **Veet Men lacks distinctive features**

Figure 64: User profile of Veet Men, February 2020

- **King of Shaves resonates with young men**

Figure 65: User profile of King of Shaves, February 2020

## THE CONSUMER – WHAT YOU NEED TO KNOW

- **Body hair removal remains stable**
- **Facial hair removal routines remain the same**
- **Shaving remains the preferred method of hair removal**
- **Consumers shave and use depilatory products less frequently**
- **Price is most important**
- **Tidiness and hygiene motivate hair removal**
- **Boosting green features represents an opportunity**

## BODY HAIR REMOVAL

- **A note on COVID-19**

- **Body hair removal remains stable**

Figure 66: Hair removal areas – body, June 2018 and January 2020

- **COVID-19 will impact hair removal rates**

- **Young men are removing body hair less**

Figure 67: Hair removal from selected body areas amongst men aged 16-24, June 2018 and January 2020

- **Older men remove pubic hair**

## FACIAL HAIR REMOVAL

- **Facial hair removal routines remain the same**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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



Report Price: £2195 | \$2995 | €2600

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

Figure 68: Hair removal areas - face, June 2018 and January 2020

- **Beards could be impacted by COVID-19**
- **Eyebrow hair removal sees a rise**
- **Permanent methods could impact rates of upper lip hair removal**

Figure 69: Female hair removal from upper lip, by age, June 2018 and January 2020

## METHODS OF HAIR REMOVAL

- **Young men visit the salon less**

Figure 70: Places of hair removal, June 2018 and January 2020

- **Wet shaving and plucking declines among young women**

Figure 71: Methods of hair removal, by gender, January 2020

- **Older women opt for dry shaving**

Figure 72: Dry shaving amongst women aged 55+, June 2018 and January 2020

## CHANGES IN USAGE OF SHAVING AND HAIR REMOVAL PRODUCTS

- **Consumers shave less frequently**

Figure 73: Changes in usage of shaving products, by gender, January 2020

- **Young consumers lead changes in shaving routines**
- **Usage of depilatory products is in decline**

Figure 74: changes in usage of waxing/sugaring products and hair removal creams, January 2020

## PURCHASE DRIVERS FOR HAIR REMOVAL PRODUCTS

- **Price is a powerful purchase driver**

Figure 75: Purchase drivers for hair removal products, by gender, January 2020

- **Women look for easy to use hair removal products**
- **Young people are interested in healthy formulas**

Figure 76: Interest towards how 'healthy' the formulas is, by generation, January 2020

## REASONS FOR HAIR REMOVAL

- **Tidiness and hygiene motivate hair removal**

Figure 77: Reasons for removing body/facial hair, by gender, January 2020

- **Women more likely to remove hair to feel attractive**
- **Young consumers worry about body odour**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

# Shaving and Hair Removal: Inc Impact of COVID-19 - UK - April 2020



Report Price: £2195 | \$2995 | €2600

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

Figure 78: Removal of body/facial hair to reduce body odour, by age, January 2020

## INTEREST IN INNOVATION

- **Opportunity to explore new skincare benefits**  
Figure 79: Interest in hair removal innovations, January 2020
- **Enriched formulas based on seasonal needs**
- **Personalisation has appeal**
- **Boosting green features represents an opportunity**  
Figure 80: Interest towards selected hair removal innovations - net, January 2020
- **Online subscription services appeal to young consumers**
- **In-store skin and hair tests attract urban consumers**  
Figure 81: Shaving and hair removal – CHAID – tree output, January 2020

## APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**
- **Forecast methodology**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.