

The Grocer

Focus On: personal care & toiletries by Natalie Brown (natalie_brown@live.co.uk)

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The Story

The personal care category is looking rather shabby at present. Only toothpaste is in any significant growth, according to exclusive research for The Grocer with skincare being the greatest loser of the past year. So what's going on? Are Brits letting themselves go? What can the rest of the market learn from toothpaste? Who are the biggest winners and losers of the past year in personal care? And how are British personal care shopping habits changing?

Key themes:

Retailers: Our research shows that the supermarkets and high street pharmacists are losing significant ground to discounters and pound stores. Why is this? How have the ways different retailers approach the category – in terms of ranging (own label, retailer exclusives, premium brands, etc), promotions and so on – evolved over the past year and what's on the cards for the coming year?

Consumer research: The Grocer has commissioned its own consumer research into how the nation's personal care habits are changing. Is the declining market proof that Brits are letting themselves go or does this just mean that we're being savvier in our shopping choices? How do consumers view own label, multipurpose products, discounters and so on when it comes to personal care?

Dental care: Toothpaste is bucking the overall decline in personal care: Brits have spent an extra £7m on the stuff in the past year, and we've bought an extra 9.8 million packs. Why is this? Which brands are driving this trend? Who have been the biggest winners and losers of the past year and what's the strategy for the coming year? How is mouthwash performing?

Skincare: There's been a volume decline in skincare over the past year. Why? With value sales falling at a slower rate, could it be that shoppers are trading up to more expensive skincare products and making them last longer? Could it be that shoppers are switching to multipurpose products, such as shower cream with moisturiser included?

Razor blades: This sector has suffered a significant decline over the past year, despite high profile launches from some of the sector's biggest players. To what extent have razor blades been hit by the current vogue for beards among men? What are brands doing to counter this trend? Are there opportunities to develop products for men with beards?

Male body shaving: Last year we reported on the alarming growth of British men shaving their body hair, with 29% of 16 to 24-year-olds regularly shaving their nether regions. Was this just a fad or is the trend for manicured male body hair gathering pace? And how much of an opportunity is this for male grooming brands?

Price, promotions and premiumisation: According to our research, shoppers are buying more products on deal, but they're opting for more premium products. This feature will include indepth analysis of how big a part price promotions have played in the market over the past year and what the strategy will be for the coming year.

Advertising and marketing: This feature will also investigate how the marketing and advertising strategies of the category's biggest players have evolved over the past year and how they will develop in the coming year to sustain growth or return brands to growth.

Innovation: Key to this feature will be a discussion of the latest NPD from the category's brands and own label players, large and small. The feature will explore the market trends that have inspired these innovations and weigh up which new launches are most likely to encourage new trends in the market. We will profile four of the most interesting new launches in a separate innovation panel.

Online presence: Online is an increasingly important channel. So which brands have the best online presence on retailers' e-commerce sites? We will reveal all with exclusive analysis from Brandview.

Key questions the feature is likely to address:

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers' strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What's next for the category?
- We profile four new products or product ranges that have ideally not appeared in The Grocer before, including launch date and RSP.