

The Grocer

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

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The Story

Value and volume sales of personal care & toiletries may have fallen in the past year but there are still some sectors that are looking decidedly spruce. So where's the most growth and which brands are behind it? What's driving the generally poor performance of the category and what can the stragglers learn from the winners of the past year?

Key themes:

Retailers: Our research shows that the supermarkets and high street pharmacists are continuing to lose 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?

Dental care: Toothpaste is outperforming the rest of the market with growth driven by premiumisation. 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: Skincare is looking in good shape right now, with IRI showing volume growth of 6.1% on value down 2.2%. Is this evidence that shoppers are trading down to cheaper products? What impact has Boots' renewed focus on No7 had on the market?

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?

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. Has there been much in the way of pasta advertising? And sauces?

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.

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?