

### December 2017

#### Suncare - UK

“The value increase in the suncare market is thanks to sun protection. Led by frequent usage rather than advances in innovation, shoppers are trading down to more basic sun protection to overcome extra expense. Aftersun remains a small segment with consumers unconvinced by its benefits, while self-tanning has fallen victim ...

#### Natural and Organic Personal Care Consumer - US

Natural brands continue to experience growth, an affirmation of the importance placed on ingredient safety and the role natural and organic personal care (NOPC) products play in an overall wellness lifestyle. To expand consumer penetration of these products and advance sales growth, stakeholders should highlight NOPC products as part of ...

#### Natural, Organic and Ethical Toiletries - UK

“Ethical considerations are very closely connected to perceptions of natural/organic, with consumers associating brands with a strong natural/organic positioning as being ethical. Ethics are important to the consumer particularly when using a brand for the first time, highlighting the importance of brands promoting their ethical credentials to win ...

### November 2017

#### Men's Personal Care - US

The men’s personal care industry is projected to reach \$4.4 billion in 2017, a 1.1% increase from 2016. While many men have a functional view of the category, they still show interest in specialized claims, added benefits, and premium products as they seek to achieve a handsome, healthy ...

#### Holiday Beauty - UK

“NPD in the holiday beauty sector largely focuses on convenience, with travel-sized products and on-the-go claims. However, with the majority of people choosing

#### Middle Adulthood and Health - US

Middle aged adults (aged 45-64) make up an important, yet often overlooked, portion of the US population, and by 2022 will account for 24% of the total US population. Today’s middle agers focus on improving their adherence to healthy behaviors, remain dedicated to the essentials of health management, and pay ...

#### Household Surface Cleaners - US

“The household surface cleaner market experienced slow growth from 2012-17 and is expected to see sluggish growth through 2022 due to the maturity of the market. While the category encompasses six segments and several sub-segments, most of its market sales comes from only three segments: all-purpose cleaners, bathroom cleaners (toilet ...

#### Small Kitchen Appliances - US

“The small kitchen appliance market has grown from the year prior. Fluctuating sales within the beverage making appliance segment tempered market growth, though there are opportunities to accelerate the market. Leveraging media channels to showcase the newest models or features could help educate consumers on the increased value and convenience ...

#### Sleep Aids - UK

“Despite a growing culture of sleep issues in the UK, a reluctance to reach for OTC sleep aids remains; growth of the category has been compounded by developments in the tech arena as well as a preference for making lifestyle adjustments over seeking remedies. Sleep is not the expendable commodity ...

#### Seniors and Health - US

The number of Seniors, adults aged 65+, is on the rise, and by 2022 will account for 17.7% of the total US population. Today’s Seniors are increasingly tech savvy,

## Household and Personal Care - International

not to buy beauty products specifically for use on holidays there is a perceived lack of need in the sector. NPDI in products by holiday type as ...

yet remain dedicated to the basics of health management. The current age of a Senior, younger (65-74) versus older (75 ...

### Fabric Care and Other Washing Ancillaries - UK

“Shorter-term attributes such as scent, freshness and softness tend to drive purchase of fabric conditioners, with longer-term attributes such as maintenance of colour or shape seemingly of secondary concern. Re-engaging consumers with caring for treasured clothing rather than relying on quick, cheap replacement could be key in adding value across ...

### Children's Personal Care Products - UK

“In a bid for safety, parents and brands alike turn to natural ingredients to provide gentle care. However, premium prices will still turn shoppers away as financial concerns mean less spend on non-essentials. Products that assist younger children could be a good opportunity, as well as appealing to the growing ...

### Pest Control and Repellents - US

“The pest control products and services market continues to experience steady growth, reaching \$10.6 billion in 2017, a 4% increase from the year prior. Warming weather trends have stimulated pest activity, driving up the need for pest products to help maintain a pest-free home. Accelerating sales growth beyond this ...

### Consumers and the Economic Outlook: Quarterly Update - UK

“Consumers’ spending power is being hit by the squeeze on incomes as inflation continues to outpace average wage rises. In four of the last five months, people have been more likely to feel worse off compared to a year ago than to say that their finances have improved. This is ...

## October 2017

### Consumers and the Economic Outlook: Quarterly Update - US

“The US economy remains strong and stable, maintaining most levels it held last quarter. Consumer outlook is still optimistic and positive, but differences in age and income level reveal different motivations for improving the current state of a consumer’s finances. Few predict that their financial situation will change much over ...

### Vacuum Cleaners - US

“Vacuum cleaners are a household staple, with most of consumers currently owning one and many planning to make a purchase within the next year. High penetration and long purchase cycles can challenge growth, but innovations that answer the need for convenience can encourage premium spending. In addition, improving maneuverability, enhancing ...

### Cleaning for the Family - UK

“The continued blurring of gender stereotypes in society may be slow to manifest when it comes to family responsibilities, but coming years will see more of a balance between cleaning tasks conducted by mothers and by fathers. When it comes to keeping homes clean and hygienic, families still focus on ...

### Water Filtration - US

Despite consumer interest in healthy living and concerns about water quality, the water filtration category declined 3% from the year prior, reaching estimated sales of \$785 million in 2017.

## September 2017

## Household and Personal Care - International

### Vitamins, Minerals & Supplements - US

Sales are beginning to slow as Mintel estimates growth for the vitamins, minerals, and supplements market in 2017. Consumer struggles with trust, cost, and the shopping experience are a challenge to the category, although many still believe in the benefits of these products. To best position themselves, category players should ...

### Family Planning and Pregnancy - UK

"A declining birth rate remains the core barrier to the growth of the family planning and pregnancy category, but limited product innovation also remains a challenge. Digital advances in fertility tracking and pregnancy tests are affording consumers more information than traditional testing products as they look to conceive, which brands ...

### Pet Supplies - US

The pet supplies market reached \$11.4 billion in 2017, a 3% increase from the previous year. The pet humanization trend continues to benefit the market as pet owners are equating their pets' needs and interests to their own. This is generating interest in pet supplies and services that follow ...

## August 2017

### Pregnancy and Health - US

"The US continues to experience low birth rates. Despite this, pregnancy specific products that address the nutritional and physical needs of pregnant women continue to roll out. Pregnancy related attitudes and ailments will drive the need for functional products that can give women the peace of mind they are doing ...

### Home Laundry Products - US

"Home laundry products are a mature category in which price competition between leading brands continues to dampen sales growth. Innovations in format and scent are proving important drivers for category growth, as consumers are driven by scent and convenient, all-in-

### Vitamins and Supplements - UK

"The UK's health trend has underpinned much of the success in the market over the last 4 years; however, an increasing focus on exercise and healthy eating has lessened consumer reliance upon vitamins and supplements. The upsurge in popularity of elimination diets provides an opportunity, while exploring tailored supplement plans ...

### Laundry Detergents - UK

"Continued reduction in household spend on laundry detergents has strengthened an association between value and low price, which brands need to address if they are to see growth return. Promoting how developments can save money in the long term, or that expand on the theme of convenience, could encourage interest ...

### Contraceptives and Sexual Health - US

"The majority of adults who disclosed their sexual activity currently use a contraceptive product, denoting a strong base of contraceptive and sexual health users. Yet, category sales only improved incrementally from 2016-17, as the male contraceptives segment struggled. Reliance on previous product experiences and a degree of embarrassment involving the ...

### Consumers and the Economic Outlook: Quarterly Update - UK

"The snap election clearly unsettled consumers. All three of our measures of sentiment fell between April and May. And the inconclusive result means that there was

## Household and Personal Care - International

one formulas. Product safety and eco-friendliness remain on the periphery of ...

no immediate bounce in confidence post-election. Instead, our data shows that people were even more concerned after the results were announced than they were ...

### July 2017

#### Air Care - UK

"Although scent is a vital part of the air care category, many people still look towards the category for pure function: removing odours. As a result, fragrance-free products may provide a future area of growth as brands try to allay concerns over ingredients, and reduce discouraging factors such as scents ...

#### Cleaning the House - US

"Housecleaning is a weekly routine with adults spending an average of nearly four hours a week cleaning. Demand for time-saving solutions makes convenient and robust cleaning products crucial. However, young adults also prioritize sensory attributes, such as scent and visual cues while cleaning. Future housecleaners are likely to pay more ...

#### Oral Care - UK

"As a hygiene essential, the category continues to experience some growth in the face of price promotions. However, a reduction in oral care routines is undermining true growth potential, with mouthwash falling from favour. A focus on reinvigorating interest in mouthwashing through new usage propositions could benefit the overall category ...

#### OTC Analgesics - UK

"A need to keep going at work is helping to keep the value of the category afloat, but it is increasingly under threat from consumers trading down to generic painkillers. Some adults are also turning to alternative methods of pain relief, potentially taking them away from buying OTC remedies, which ...

### Consumers and the Economic Outlook: Quarterly Update - US

"As of June 2017, the economy is still improving, wages are slowly rising, and unemployment numbers continue to fall. Consumer sentiment about their financial situation remains healthy, and most consumers don't think their finances will change (or increase) that significantly. Parents overall are somewhat more optimistic about the financial future ...

### June 2017

#### OTC Pain Management - US

"A majority of consumers turn to some form of OTC (over-the-counter) pain management product to treat pain, with internal analgesics remaining the dominate choice for pain relief, though external analgesics continue to experience faster growth. Looking forward, consumers' need for pain treatments is not expected to change, and a preference ...

#### Oral Care - US

"In a category with slow but steady sales growth and high penetration, factors such as brand, benefits, and costs have the greatest influence in purchase decisions. To maximize growth potential, stakeholders should leverage a need for sensitivity products, products offering a variety of benefits, and natural positioning."

- Jana Vyleta, Health ...

### Cookware - US

"Cookware sales have remained slow amid high household penetration, yet steady growth is likely attributed to consumers' generally positive attitudes toward cooking and baking at home. While adults find health and creative benefits to the process, there is interest in furthering their skills in the kitchen and expanding their inventory ...

## May 2017

### Dishwashing Products - UK

"Competitive pricing across the dishwashing category has dented value sales. While a low level of dishwasher ownership remains a limiting factor, boosting usage of dishwasher ancillaries is an area of potential growth. Meanwhile, interest in ultra-concentration and non-drip caps suggests areas to explore to invigorate the hand dishwashing market." ...

### Dishwashing Products - US

"The dishwashing category is mature, with just a few companies dominating the market. Although leading brands and convenient formats have led sales growth, consumers are price driven in their purchases. Robust cleaning, especially removing food residue and cutting grease, is crucial for entering the category, but consumers also view natural ...

## April 2017

### Consumers and the Economic Outlook: Quarterly Update - US

"With a new administration, a growing economy, and a relatively healthy jobs market, this Report addresses how consumers are feeling about their current financial situation. Through a series of questions that will be asked throughout 2017, Mintel has aggregated consumer opinion on their current finances, how they hope to improve ...

### Hand, Body and Footcare - UK

"Consumers are growing bored due to less innovation and advertising spend in hand, body and footcare. The prestige sector should copy professional treatments as

### Drug Store Retailing - US

The effects of an aging population focused on health management are positive for the drug channel, which is projected to continue on its path of upward sales growth over the next five years.

### Cough, Cold, Flu and Allergy Remedies - UK

"Modern lifestyles are continuing to take their toll on consumer health. A need to power through at work not only increases the demand for products that can alleviate the symptoms of coughs and colds, but also helps spread those coughs and colds through the workplace, whilst climate change and exposure ...

### Cough, Cold, Flu and Allergy Remedies - US

"US sales of OTC cough, cold, flu, and allergy remedies have had healthy growth for the past few years, yet slowed from 2015-16. A mild cold/flu season, effective flu vaccines, and more moderate success in Rx-to-OTC switches is likely to have tempered market growth. Mintel expects growth to continue ...

### Mattresses - US

"The mattress category has undergone significant change in recent years due to new product segmentation, changing consumer needs, and e-

## Household and Personal Care - International

the trade down from premium to mass brands accelerates, or partner with fashion and social media. Basic consumers care about skin comfort and relief. Brands can ...

commerce sales. Mattress purchasers are primarily quality driven, especially as sleep becomes a health priority. Brick-and-mortar retailers benefit from the preference among shoppers to try out a mattress before buying; however ...

### Toilet Cleaning, Bleaches and Disinfectants - UK

"Dettol's launch of a spray format has added versatility and convenience to disinfectants, and has rejuvenated the segment as a consequence. Prominent product launches and advertising campaigns from Bloo and Duck have also shown that there is potential for value growth within the toilet cleaning segment, despite an overall decline ...

### Shampoo, Conditioner and Hairstyling Products - US

"The mature shampoo, conditioner, and hairstyling products market has posted steady growth, driven by gains in the larger shampoo and conditioner segments, allowing the market to overcome struggling sales of hairspray and hairstyling products. However, concerns over damage and preferences for simplicity have left consumers skipping daily washing, creating longer ...

### Hard Surface Cleaning and Care - UK

"The dominance of multipurpose cleaners, a lack of product development and reduced advertising spend have created a perfect storm for the hard surface cleaners category, which continues to struggle to show growth despite the rising population and number of households. However, with discounting and product promotions reaching a plateau, growing ...

## March 2017

### Disposable Baby Products - US

"Sales growth of disposable baby products has reached a five-year high in 2016, driven by training pants, natural brands, and private label. Future sales are projected to grow annually as parents continue to value the safety and gentleness of these products, brand name, product efficacy, and value."

- Jana Vyleta, Home ...

### OTC Sleep Aids - US

"The majority of adults struggle with sleep. The inability to get a good night's sleep paired with the spotlight placed on the importance of sleep have helped strengthen OTC sleep aid market growth and should continue to boost sales as consumers face many sources of sleeplessness. However, persistent consumer concerns ...

### Consumers and the Economic Outlook: Quarterly Update - UK

"Consumer sentiment has remained strong, reflecting growing real wages, low unemployment and, as yet, the absence of any major economic upheaval post-EU vote. When it comes to the impact of the vote, people are relatively positive about the big-picture issues such as the UK's economic growth, and most feel ...

### Air Care - US

"The air care market experienced a slight sales decline in 2016, reflective of flat market penetration, increasing competition, and a functional approach to the category. However, interest in air purifying and aromatherapy benefits may encourage increased consumer spend. Adults may also be drawn to retailers with enhanced shopping experiences, including ...

## Household and Personal Care - International

### Women's Haircare - UK

"The women's haircare sector has struggled to show growth in recent years as savvy shopping behaviours continue to take their toll, with the category showing value growth of just 0.3% in 2016. The value of the prestige sector has shown a particular rise, keeping the category afloat, suggesting a ...

### Nutrition, Health, Vitamins & Supplements - All Regions

Mintel's Annual Overviews take a look back at 2016 and provide a detailed overview of the key issues faced by key categories through the year. Including; a full market overview, an in-depth review of the big stories from the year as well as our forecast for the future of these ...

## February 2017

### Food Storage and Trash Bags - US

"Food storage and trash bag products experienced flat sales in 2016, benefiting from consumers' reliance on food storage products and trash bags for household food prep and food disposal needs. However, due to the highly functional nature of the category, brands are challenged with boosting incremental sales. Going forward, promoting ...

### Soap, Bath and Shower Products - UK

"The soap, bath and shower market continues to be hindered by decreasing product usage, with competitive pricing strategies having a greater influence than new product innovations. There are, however, opportunities in the market to encourage trading up, such as focusing on lifestyle trends to promote the emotional and functional benefits ...

### Household Paper Products - UK

"Purchasing household paper products tends to be a habitual process, meaning that brands need to work to break habits in order to increase sales. There are consumer concerns about the environment in this category, suggesting that there may be scope to increase interest in recycled or alternative fibres. However, brands ...

### First Aid - US

The first aid category is experiencing flat sales in 2016 due to declines in foot care and an overall value-driven mindset among consumers. Future growth is projected to be modest as consumers continue to seek out products that provide value, durability, and functionality, and a shopping experience that is transactional ...

### Major Household Appliances - US

"Innovation in the category and a healthy housing market has led to continued sales momentum in major household appliances. Mid-range brands have the highest current ownership among respondents, while higher-end brands have elevated ownership among young adults and higher earners. Replacement is the leading driver for appliance purchases, but appliances ...

### Men's and Women's Beauty and Grooming Routines - UK

"Appearance is so crucial to confidence that today's adults aim to conduct the vast majority of their beauty and grooming tasks before facing the day ahead. However, busy lifestyles are taking their toll, which could spell trouble for products that require a greater level of time commitment. Harnessing the potential ...

## January 2017

### Household Care Packaging Trends - US

"Packaging and design continue to become more important in mature and highly functional household

### Beauty Retailing - UK

"The beauty retail market is experiencing slowing growth as consumers are spending less, notably on basic products within the personal care segment. Stores



## Household and Personal Care - International

care product categories. Packaging serves as a way to stand out among competitors as well as communicate product value and information. Packaging is also a key component in shaping a consumer's shopping and user experience, which ...

### Managing Your Health - US

"The US continues to experience significant growth among the older population, along with an increasing life expectancy, growing the demand for products and services to assist health-engaged consumers. In order to help consumers overcome barriers to living a healthy lifestyle, it will be essential to tap into their emotional motivators ...

remain vital to the beauty purchase process; and by investing in new services and technology, retailers are able to add value to their offering that cannot be ...

### Smoking Cessation and E-cigarettes - UK

"After two years of disappointing sales performance, the smoking cessation sector has seen a rise in value in 2016 driven by NPD and a rise in advertising investment. In terms of E-cigarettes, overall usage remains the same despite a decline in usage as a smoking cessation method, suggesting reduced penetration ...