



5 TRENDS IN HOUSEHOLD AND PERSONAL CARE



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EDITORIAL

Mintel's team of world-class analysts will help you monitor market trends, product innovation and consumer behaviour. Here's a hand-picked selection of articles written by them on the Household and Personal Care market.

This is just a taster of what you can expect from Mintel.

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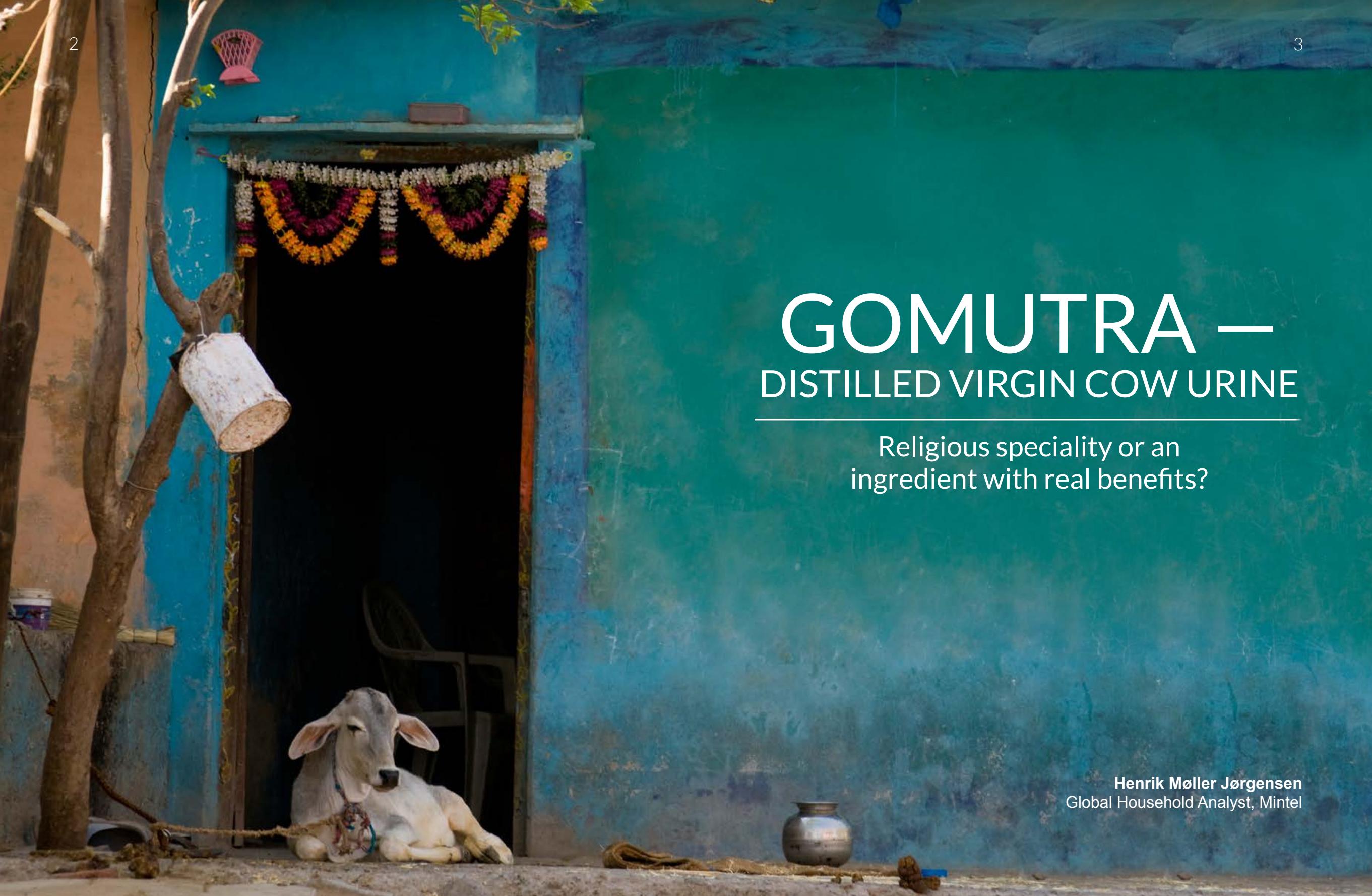
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GOMUTRA – DISTILLED VIRGIN COW URINE

Religious speciality or an
ingredient with real benefits?

Henrik Møller Jørgensen
Global Household Analyst, Mintel



The therapeutic use of virgin cow urine has a long history in India, particularly in Ayurvedic medicine, an ancient healthcare tradition that has been practised for more than 5,000 years.

Uric acid, also named urea or carbamide, is still used in beauty and personal care products for its skin healing and smoothening properties.



Ayurvedic medicine is considered to be the world's oldest healthcare system and its name is Sanskrit for "science of life". According to the University of Minnesota, Ayurvedic medicine is India's primary

healthcare system and is used by more than 90% of the sub-continent's population. Historically, urine has been used for various purposes such as tanning



Ayurvedic medicine is considered to be the world's oldest healthcare system and its name is Sanskrit for "science of life".

animal hides, cleaning and whitening of clothes, tooth whitening, gunpowder and

as a health supplement, including in Western cultures. Even though early Europeans knew about soap, many launderers preferred to use urine for its ammonia to get tough stains out of clothes. After soap making became more prevalent, urine (known as chamber lye) was often used as a soaking treatment for removal of tough stains. Uric acid, also named urea or carbamide, is still used in beauty and personal care products for its skin-healing and smoothening properties. It is also used in household

cleaners but as a minority ingredient compared to ammonia which is a common ingredient in hard surface cleaning.

Today, urea or carbamide is rarely used as an ingredient in hard surface cleaners (0.05% of launches between 2009 and 2013 according to Mintel GNPD), whereas ammonia enjoys widespread use both for its fresh fragrance and high cleaning power. Ammonia is a more common ingredient in hard surface cleaners (2.1% of product launches during

2009-13) although just as many products (2.2%) claim to be free from this powerful, natural cleaning agent.

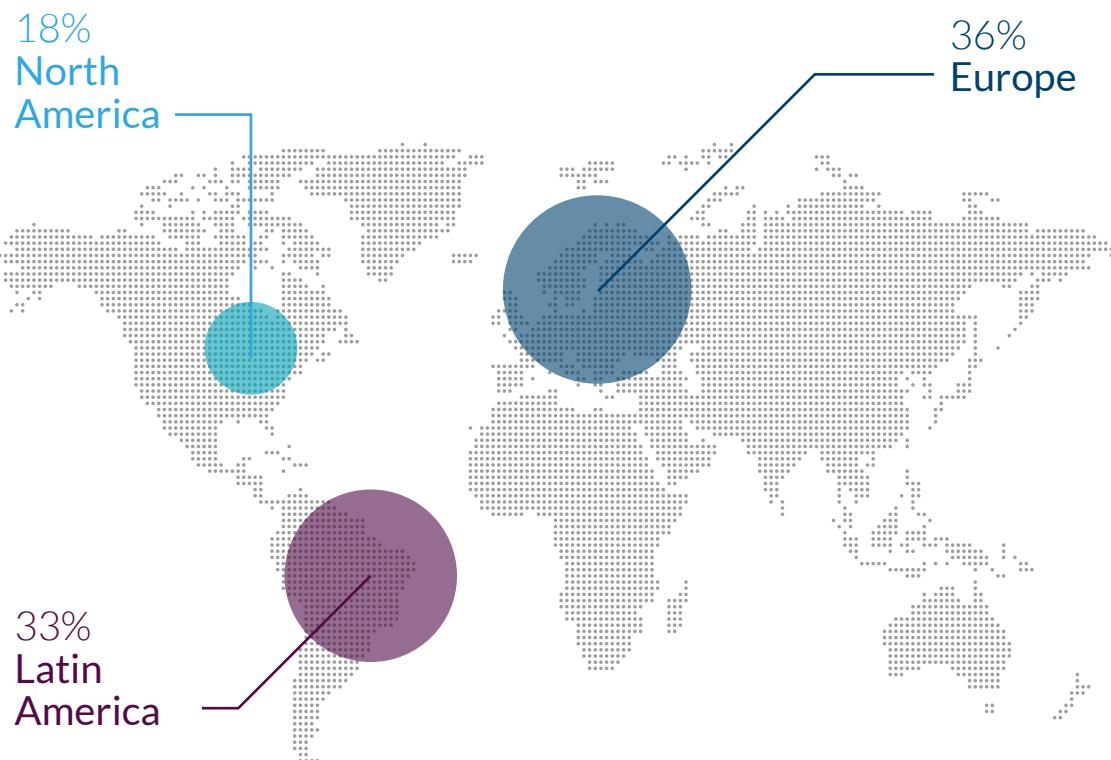
Globally, the most important hard surface cleaner categories containing ammonia as an active ingredient are all-purpose cleaners (48% of product

launches) and glass care (38%). About a third of these ammonia-containing products have been launched in Europe (36%) or Latin America (33%) followed by North America (18%), but are relatively scarce in Asia Pacific and the Middle East & Africa.

CONSUMER INTEREST IN NATURAL AND HEALTHY INGREDIENTS

Distilled virgin cows' morning urine, or indeed any other type of urine, is likely to repel most modern consumers, but the health benefits and functional properties of this traditional

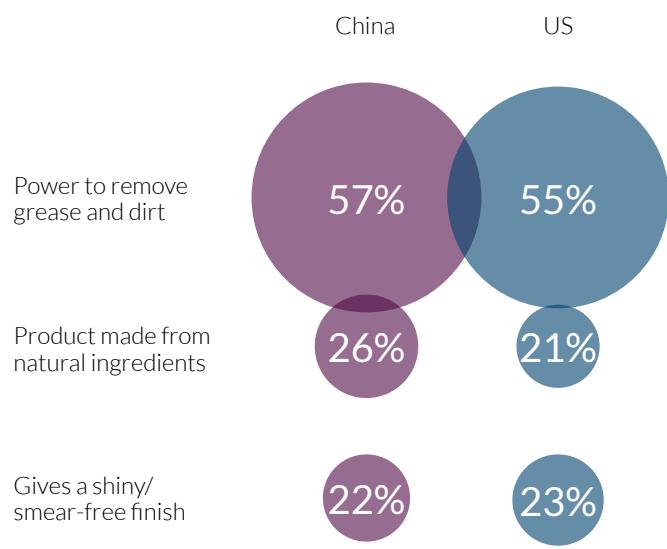
Product launches of ammonia-containing products



SOURCE: MINTEL

ingredient should be attractive to consumers. For instance, about four in 10 German and British users of hard surface cleaners and six in 10 Italian, French or Spanish users are worried about the impact that ingredients in household cleaners might have on their health, which suggests high interest in products based on ingredients that are beneficial to health. In China, over eight in 10 (83%) adults would like to see more options of hard surface cleaning products that provide added benefits for health, while natural credentials are associated with safety for use around children or pets by most Americans who do household cleaning.

US and China, selected factors affecting choice of hard surface cleaner, 2013



SOURCE: LIGHTSPEED, GMI / QQSURVEY / MINTEL

Base: 1,797 internet users age 18+ who are responsible for doing household cleaning (US); 2,991 internet users aged 20-49 buying cleaning products in the past 12 months (China)





MINTEL GNPD

(GLOBAL NEW PRODUCTS DATABASE)

Tracking consumer packaged
goods launches worldwide



FOUR INNOVATIVE WAYS BAR SOAP IS REVOLUTIONISING BATH TIME

Diane Park

Asia Beauty Analyst, Mintel

While liquid soap has grown in popularity over time around the world, the classic bar soap takes first place in the category in many markets worldwide. In the US, for example, 72% of consumers buy bar soap – but liquid hand soap sees lower and more varied purchases; with 67% of US consumers with children purchasing liquid hand soap, compared to just 60% of those without children. In

the UK, 7% of consumers buy bar soap at least once a week, but as many as 21% buy bar soap once a month. Meanwhile, in terms of sales, in 2013, the US bar soap market alone was worth \$1,779 million and the UK bar soap market was worth £83.3 million.

Multi-sensory bar soaps are expanding their roles to add more value to bath time, not only cleansing

and skin-conditioning, but improving the user's mood. Mintel's GNPD data shows that sensory bar soaps accounted for a mere 2% of total bar soap launches in 2008 - but that has grown to as many as 5% of launches from January-July 2014 alone.

We take a look at the innovative sensory bar soaps leading the way...





01

24 CARAT GOLD SOAP

The Chinese bar soap market was worth ¥6,790.9 million in 2013 and 92% of Chinese consumers buy bar soap. Seeing as such a large portion of the market in China buy bar soap, there is clearly space for high-end products.

Formulated with valuable 24 carat gold in small particles to deeply promote suppleness and refine skin texture, leaving skin soft, youthful and revitalised.



Stender's Feel the Glamour! 24 Carat Gold Soap brings a touch of luxury and glamour to the bar soap market, formulated with valuable 24 carat gold in small particles to deeply promote suppleness and refine skin texture, leaving skin soft, youthful and revitalised. It also includes pomegranate with excellent antioxidant properties that protect

skin against UV rays and environmental pollution, as well as accelerating skin cell regeneration.

Priced at ¥260 (\$46), the soap is the gold standard of the bar soap market. This sparkling soap claims to deliver an elegant bouquet of scent while leaving skin youthful, supple, bright and toned.

02

TOUCH-FRIENDLY SOAP

Bar soaps have the capability to offer a multi-sensory experience through

unique and pleasant textures. An example of this is Lush Le Fun d'Or Savon (The Golden Fun Soap), launched in France where the bar soap market was worth €99.7 million in 2013. The soap is described as a multipurpose mouldable soap that combines soap, shampoo, bubble bath and a malleable toy in a single

product. It contains corn flour, glycerin and bergamot essential oils and will set you back €9.95. It also features a comforting honey and caramel fragrance, which may appeal to the 46% of French consumers who like to check what a product smells like before buying it.



03

CHOCOLATE SOAP

Make sure you're not feeling hungry when washing yourself with this chocolate-flavoured soap, launched in Spain in April 2014. Nearly two thirds (65%) of Spanish consumers claim to use bar soap and the Spanish bar soap market was worth €35 million in 2013. Lixoné Spa Facial & Corporal Jabón de Chocolate (Face and Body Spa Chocolate Soap) is designed for dry skin and contains moisturising and emollient cocoa butter that leaves skin soft, silky and radiant with a healthy glow. This will appeal to the 57% of Spanish consumers who are interested in soap, bath and shower products with a long-lasting moisturising effect. The soap is also coloured brown to continue the guise of a bar of chocolate.



04

NATURAL SOAP

The product concept of 'naturals' is growing in appeal among consumers and natural bar soaps want to communicate their naturalness in a sensory way instead of just by language. They are emphasising their natural ingredients through scent, colour and shape or texture, or by using aromatherapy to create a sense of wellbeing.

An example of this is the Holy Lama Naturals Curcuma Soap launched in India and retailing at INR55 (\$1.03). The soap is described as a natural handmade Ayurvedic soap with unique curcumin technology and it is said to be a good antiseptic and antibacterial soap. To enhance the natural qualities of the soap it is held in a folded, dried and moulded banana leaf.

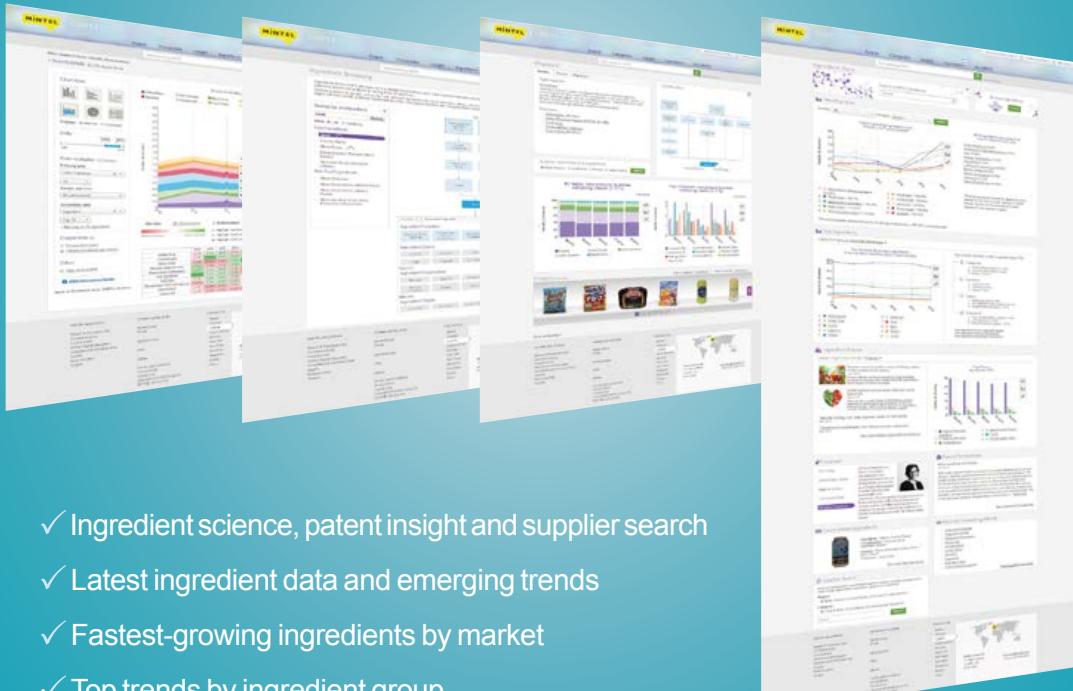
The Indian bar soap market was worth INR117, 500 million in 2013.





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SPRAYING ROMANCE IN INDIA

The aircare category is creating new usage occasions by linking products to lifestyle

Jamie Rosenberg
Household and Personal Care Analyst, Mintel

Over the last 12 months, the air care category has launched products for better sleep, rituals, nostalgia, watching sporting events and even showing school pride. Air Wick has built upon this drive for lifestyle support with a campaign in India to link air care with a better love life.

A series of 30-second commercials uses this theme to advertise Air Wick Freshmatic, which shows a young couple at home, encountering situations that would typically bring discord. According to Reckitt Benckiser brand director, Nitesh Tiwari, the couples in this campaign are often too busy for romance and Air

Wick is filling a need, while expanding the usage of its product. The genius of this campaign is that Air Wick now has the flexibility to launch more specific fragrances that take consumers into subsets of romance ranging from passion to companionship. Romance could give the brand a fertile platform for innovation.

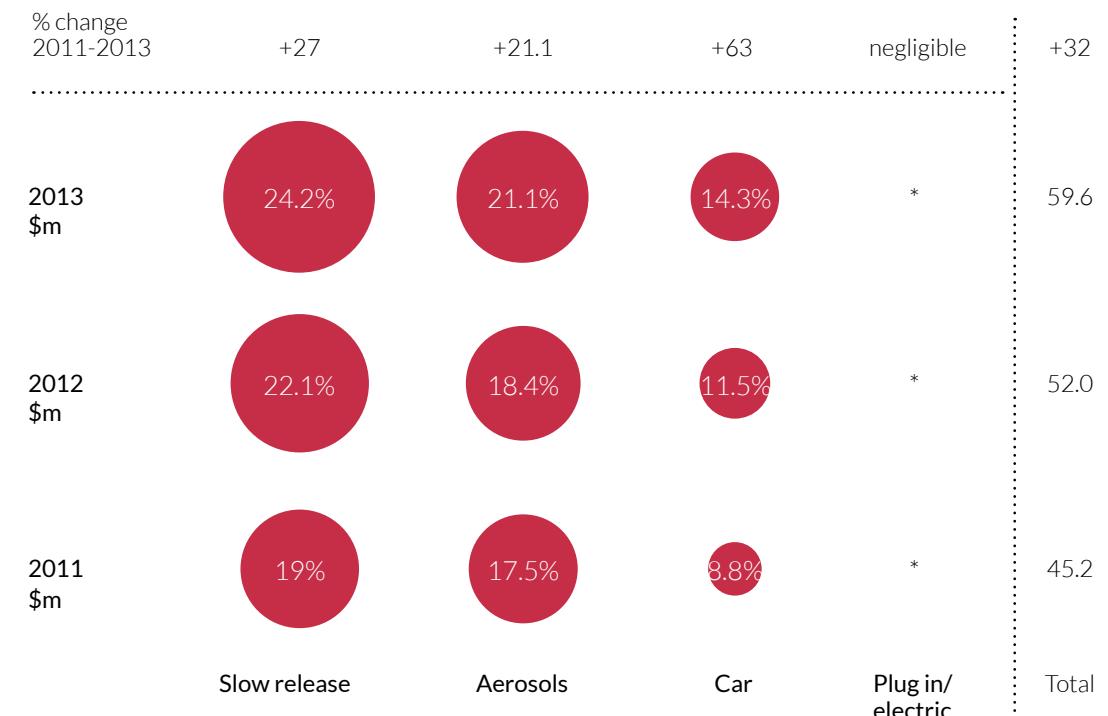


AIR WICK FRESHMATIC





India, retail value sales of air freshners by sector, 2010-13



Romance could give the brand a fertile platform for innovation.

Air Wick is targeting what is often referred to as "new age" couples in India. These couples are modern, educated, affluent, often with

dual incomes – and they are spending more on air care. Both the market size and spend per capita are projected to nearly triple in value by 2018.

Until recently, the air care category's primary platform for innovation has been the delivery mechanism. But innovative delivery systems

also increase costs. Slow growth in mature markets and low incomes in emerging markets have made fragrance the new innovation vehicle and air care brands still have enormous potential to use the power of smell to further segment consumers around various aspects of life.



TOILET SEATS ARE NOT JUST FOR SITTING

Gabriela Elani | Home and Personal Care Analyst, Mintel

Consumers enjoy having fragrance in their homes, whether to create a specific ambience or to mask and eliminate unpleasant odours. Mintel's *Air Care – US, August 2014* report finds that some 82% of consumers use some type of air freshener or candle

product in their home, underscoring the category's popularity. While there is a strong emotional component that comes with using air fresheners, functionality is just as important, especially when it comes to tackling unpleasant odours. Mintel's *Air Fresheners – US,*

September 2013 report finds that bathroom odours are the primary odour offender, as more than seven in 10 air care users say that bathroom odours are the type of odour they find themselves trying to eliminate most frequently.

Kohler is coming to the rescue with its newest toilet seat that has the potential to help homeowners in their fight against unfortunate bathroom odours. The company just launched its line of Purefresh toilet seats, which are battery-activated toilet seats that emit a continuous pleasant fragrance through the use of a built-in fan and replaceable scent pack. Once a consumer comes in contact with the toilet seat, the built-in fan activates and begins to spread the fragrance emitted by the integrated scent pack. An integrated carbon filter is also included to neutralise unpleasant odours, only leaving behind the fragrance from the scent pack. Consumers can buy a Purefresh toilet seat separately to upgrade their current seat.

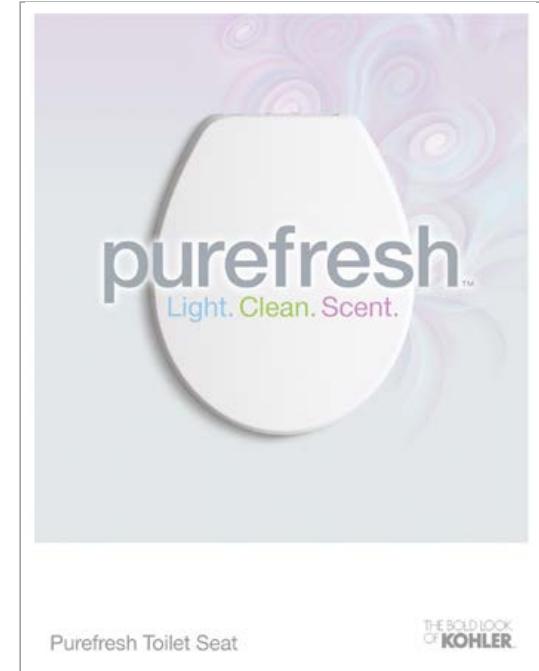
This product launch could have significant implications on the air care market because bathroom use is one of the primary usage occasions for air freshener and candle products. Having a toilet seat that delivers fragrance each time the

toilet is used could eliminate the need for separate air freshener and candle products in bathrooms.

Air care companies could prevent sales cannibalisation by partnering with Kohler and other toilet seat makers to create the fragrance packs that are used in these seats. Brands such as Glade and Febreze could partner with Kohler to sell co-branded fragrance packs. This

could help air care brands reclaim some sales should fragranced toilet seats become popular.

82% of consumers use some type of air freshener or candle product in their home.





SKINCARE PROTECTING AGAINST ENVIRONMENTAL CHANGES AND URBAN LIFESTYLES

Emmanuelle Moeglin
Global Fragrance and Personal Care Analyst, Mintel



The impact of sun exposure on skin has been a strong focus in cosmetics, making the SPF claim a must-have for beauty brands.

However, consumers are increasingly aware of the damages certain aspects of lifestyle can have on the skin, including other environmental stressors beyond sun exposure. Brands have recognised the need and are catering to this concern. Can the anti-pollution claim become the new SPF?

THE CHINESE CONCERN

Concern regarding air pollution is especially high in Asian cities. In China, a number of product launches have centred on reducing the effects of pollution on the skin in direct relation to growing concerns over pollutant levels in the air.

The term PM 2.5 (the abbreviation of Particulate Matter 2.5, which refers to air pollutants with a diameter of 2.5 micrometres or less) has become a marketing claim in Chinese skincare products.

Mintel research has found that pollution is ranked the third-highest concern by 20-49-year-old Chinese consumers at 41%. Recent research published by the Proceedings of the National Academy of Sciences (PNAS) shows that pollution from coal-burning home heating systems has shortened life expectancy in Northern China by five and a half years. Therefore, linking skincare solutions to concerns over pollution has been a major trend in recent years. For instance, make-up base in this market are used to protect from

any potential harm from cosmetics, UV rays and other pollution rather than improve coverage, some are known as "isolation cream" (Ge Li Shuang).

ANTI-POLLUTION CLAIM WILL GAIN POPULARITY IN THE WESTERN MARKET

But protection against pollution is no longer limited to Asia. Although air pollution is less of a concern in the USA, some 30% of facial skincare users worry about the effects of the

environment on their skin. A number of Western brands including Clarisonic, Avon and Simple have released studies to advertise the damage sun, stressful lifestyle and pollution can cause on the skin.

Clarins educates consumers on pollution and city lifestyle threats, while releasing the brand's first "atmospheric anti-pollution complex" featured in Clarins Extra-Comfort Anti-Pollution Cleansing Cream.

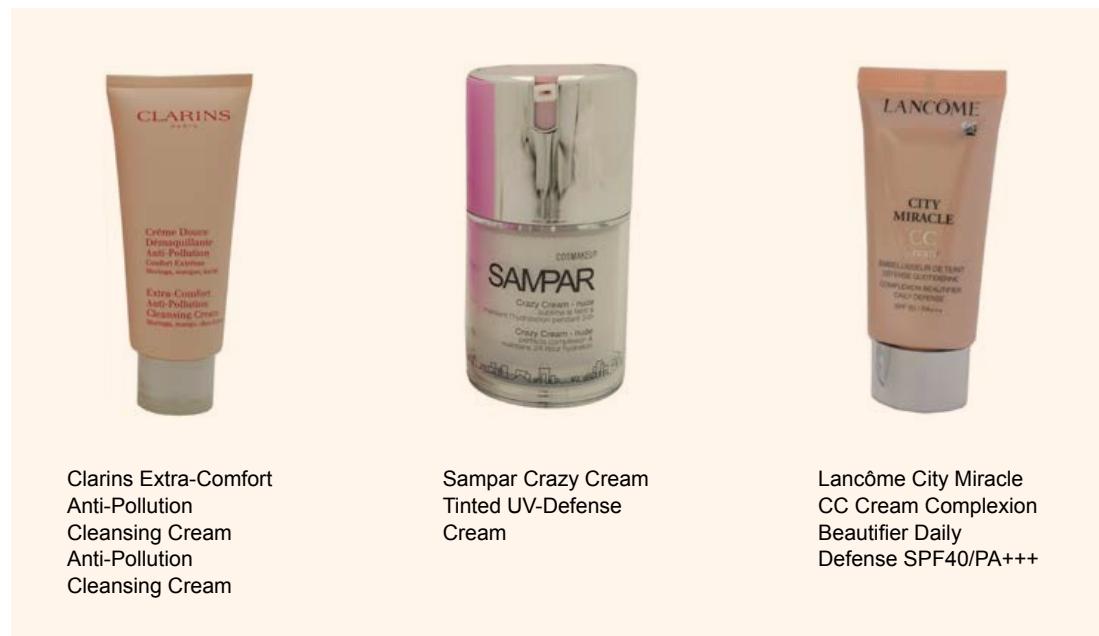
Products also focus on "city-defense" claim,

such as French brand Sampar that contain Urban Advance, an anti-pollution shield said to support skin's functions. Meanwhile, Lancôme City Miracle CC Cream was tested in some of the world's most polluted cities and contains anti-pollutant Detoxyl.

In the UK, over 8 in ten consumers are aware of the impact of lifestyle stresses on skin. After the Sahara Dust Smog swept the UK in 2014, interest in anti-pollution products is set to be a growing area for beauty and personal

care launches. The number of products launched containing anti-pollution claims is expected to increase in coming years, and impacting all beauty categories, especially facial skincare, colour cosmetics, haircare and soap.

Concern regarding air pollution is especially high in Asian cities.



Clarins Extra-Comfort Anti-Pollution Cleansing Cream
Anti-Pollution Cleansing Cream

Sampar Crazy Cream
Tinted UV-Defense Cream

Lancôme City Miracle CC Cream Complexion Beautifier Daily Defense SPF40/PA+++



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