Passport

Bath and Shower in the United Kingdom

Euromonitor International

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BATH AND SHOWER IN THE UNITED KINGDOM - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Bath and shower records improving value sales, while volumes continue to drop

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Private label growth and shrinkflation are major challenges for bath and shower

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Premium segment supported by consumers seeking benefits beyond simple functionality

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PROSPECTS AND OPPORTUNITIES

Lines across bath and shower to blur with launch of more hybrid and multifunctional products

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Refillable formats set to grow significantly over forecast period

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Increasing focus on women's health and wellness to fuel sales of intimate washes

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CATEGORY DATA

Table 1 Sales of Bath and Shower by Category: Value 2018-2023

GBP million

	2018	2019	2020	2021	2022	2023
Bath and Shower						
Bar Soap						
Bath Additives						
Body Powder						
Body Wash/Shower Gel			Data removed from sample			
Hand Sanitisers						
Intimate Hygiene						
- Intimate Washes						
- Intimate Wipes						
Liquid Soap						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Bath and Shower by Category: % Value Growth 2018-2023

% current value growth

	2022/23	2018-23 CAGR	2018/23 Total
Bath and Shower			
Bar Soap			
Bath Additives			
Body Powder			
Body Wash/Shower Gel		Data removed from sample	
Hand Sanitisers			
Intimate Hygiene			
- Intimate Washes			
- Intimate Wipes			
Liquid Soap			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Bath and Shower by Premium vs Mass: % Value 2018-2023

% retail value rsp

	2018	2019	2020	2021	2022	2023
Premium			Data removed from sample			
Mass						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 NBO Company Shares of Bath and Shower: % Value 2019-2023

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 LBN Brand Shares of Bath and Shower: % Value 2020-2023

% retail value rsp

Brand (GBO)	Company (NBO)	2020	2021	2022	2023

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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Premium Bath and Shower: % Value 2020-2023

% retail value rsp

Brand (GBO)	Company (NBO)	2020	2021	2022	2023

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Forecast Sales of Bath and Shower by Category: Value 2023-2028

GBP million

	2023	2024	2025	2026	2027	2028
Bath and Shower						
Bar Soap						
Bath Additives						
Body Powder						
Body Wash/Shower Gel						
Hand Sanitisers						
Intimate Hygiene						
- Intimate Washes						
- Intimate Wipes						
Liquid Soap						

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 8 Forecast Sales of Bath and Shower by Category: % Value Growth 2023-2028

% constant value growth

	2023/2024	2023-28 CAGR	2023/28 Total
Bath and Shower			
Bar Soap			
Bath Additives			
Body Powder			
Body Wash/Shower Gel			
Hand Sanitisers			
Intimate Hygiene			
- Intimate Washes			

Data removed from sample

- Intimate Wipes	Data removed from sample
Liquid Soap	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 9 Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2023-2028

% retail value rsp

	2023	2024	2025	2026	2027	2028
Premium	Data removed from sample					
Mass						
Total						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

BEAUTY AND PERSONAL CARE IN THE UNITED KINGDOM - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Beauty and personal care in 2023: The big picture

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2023 key trends

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Competitive landscape

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Retailing developments

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What next for beauty and personal care?

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MARKET DATA

Table 10 Sales of Beauty and Personal Care by Category: Value 2018-2023

GBP million

	2018	2019	2020	2021	2022	2023
Beauty and Personal Care						
Baby and Child-specific Products						
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Oral Care Excl Power Toothbrushes						
Skin Care						
Sun Care						
Premium Beauty and Personal Care						
Prestige Beauty and Personal Care						
Mass Beauty and						

Data removed from sample

Personal Care	Data removed from sample
Dermocosmetics Beauty and Personal Care	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care
Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, and baby and child-specific sun care categories

Table 11 Sales of Beauty and Personal Care by Category: % Value Growth 2018-2023

% current value growth

	2022/23	2018-23 CAGR	2018/23 Total
Beauty and Personal Care	Data removed from sample		
Baby and Child-specific Products			
Bath and Shower			
Colour Cosmetics			
Deodorants			
Depilatories			
Fragrances			
Hair Care			
Men's Grooming			
Oral Care			
Oral Care Excl Power Toothbrushes			
Skin Care			
Sun Care			
Premium Beauty and Personal Care			
Prestige Beauty and Personal Care			
Mass Beauty and Personal Care			
Dermocosmetics Beauty and Personal Care			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care
Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, and baby and child-specific sun care categories

Table 12 GBO Company Shares of Beauty and Personal Care: % Value 2019-2023

% retail value rsp

Company	2019	2020	2021	2022	2023
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 NBO Company Shares of Beauty and Personal Care: % Value 2019-2023

% retail value rsp

Company	2019	2020	2021	2022	2023

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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 LBN Brand Shares of Beauty and Personal Care: % Value 2020-2023

% retail value rsp

Brand (GBO)	Company (NBO)	2020	2021	2022	2023

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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Penetration of Private Label in Beauty and Personal Care by Category: % Value 2018-2023

% retail value rsp

	2018	2019	2020	2021	2022	2023
Beauty and Personal Care						
Baby and Child-specific Products						
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Skin Care						
Sun Care						
Mass Beauty and Personal Care						

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Distribution of Beauty and Personal Care by Format: % Value 2018-2023

% retail value rsp

	2018	2019	2020	2021	2022	2023
Retail Channels						
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- Supermarkets						
--- Hypermarkets						

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--- Discounters	
--- Warehouse Clubs	
--- Food/drink/tobacco specialists	
--- Small Local Grocers	
-- Non-Grocery Retailers	
--- General Merchandise Stores	
---- Department Stores	
---- Variety Stores	
--- Apparel and Footwear Specialists	
--- Appliances and Electronics Specialists	
--- Home Products Specialists	
--- Health and Beauty Specialists	**Data removed from sample**
---- Beauty Specialists	
---- Pharmacies	
---- Optical Goods Stores	
---- Health and Personal Care Stores	
--- Leisure and Personal Goods Specialists	
--- Other Non-Grocery Retailers	
-- Vending	
-- Direct Selling	
- Retail E-Commerce	
Non-retail channels	
- Hair Salons	
Total	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Distribution of Beauty and Personal Care by Format and Category: % Value 2023

% retail value rsp

	Baby and Child-specific Products	Bath and Shower	Colour Cosmetics	Deodorants	Depilatories	Fragrances
Retail Channels						
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers			**Data removed from sample**			
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						

-- Non-Grocery Retailers
--- General Merchandise Stores
---- Department Stores
---- Variety Stores
--- Apparel and Footwear Specialists
--- Appliances and Electronics Specialists
--- Home Products Specialists
--- Health and Beauty Specialists
---- Beauty Specialists
---- Pharmacies
---- Optical Goods Stores
---- Health and Personal Care Stores
--- Leisure and Personal Goods Specialists
--- Other Non-Grocery Retailers
-- Vending
-- Direct Selling
- Retail E-Commerce
Non-retail channels
- Hair Salons
Total

Data removed from sample

Hair Care | Men's Grooming | Oral Care | Skin Care | Sun Care

Retail Channels
- Retail Offline
-- Grocery Retailers
--- Convenience Retail
---- Convenience Stores
---- Forecourt Retailers
--- Supermarkets
--- Hypermarkets
--- Discounters
--- Warehouse Clubs
--- Food/drink/tobacco specialists
--- Small Local Grocers
-- Non-Grocery Retailers
--- General Merchandise Stores
---- Department Stores
---- Variety Stores
--- Apparel and Footwear Specialists
--- Appliances and Electronics Specialists
--- Home Products Specialists
--- Health and Beauty Specialists
---- Beauty Specialists
---- Pharmacies

Data removed from sample

---- Optical Goods Stores	Data removed from sample
---- Health and Personal Care Stores	
--- Leisure and Personal Goods Specialists	
--- Other Non-Grocery Retailers	
-- Vending	
-- Direct Selling	
- Retail E-Commerce	
Non-retail channels	
- Hair Salons	
Total	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: BC = baby and child-specific products; BS = bath and shower; CC = colour cosmetics; DO = deodorants; DP = depilatories; FR = fragrances; HC = hair care; MG = men's grooming; OC = oral care; SK = skin care; SU = sun care

Table 18 Forecast Sales of Beauty and Personal Care by Category: Value 2023-2028

GBP million

	2023	2024	2025	2026	2027	2028
Beauty and Personal Care	Data removed from sample					
Baby and Child-specific Products						
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Oral Care Excl Power Toothbrushes						
Skin Care						
Sun Care						
Premium Beauty and Personal Care						
Prestige Beauty and Personal Care						
Mass Beauty and Personal Care						
Dermocosmetics Beauty and Personal Care						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances and baby and child-specific sun care categories

Table 19 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2023-2028

% constant value growth

	2023/2024	2023-28 CAGR	2023/28 Total
Beauty and Personal Care			
Baby and Child-specific Products			
Bath and Shower			
Colour Cosmetics			
Deodorants			
Depilatories			
Fragrances			
Hair Care			
Men's Grooming			
Oral Care			
Oral Care Excl Power Toothbrushes			
Skin Care			
Sun Care			
Premium Beauty and Personal Care			
Prestige Beauty and Personal Care			
Mass Beauty and Personal Care			
Dermocosmetics Beauty and Personal Care			

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances and baby and child-specific sun care categories

DISCLAIMER

Forecast and scenario closing date: 8 April 2024

Report closing date: 8 May 2024

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

Official Sources	

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Trade Associations
Trade Press

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Content removed from sample

Source: Euromonitor International