

# SOAP, BATH AND SHOWER PRODUCTS – US – 2024

Even as cleansing is incorporated into beauty and health regimens, proliferating benefits are put under the scrutiny of multifunctionality, value and efficacy.



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# Soap, Bath And Shower Products - US - 2024

## This report looks at the following areas:

- Market size, forecast and segment performance of the US soap, bath and shower market
- Market trends within the US soap, bath and shower market
- Key challenges and opportunities for US soap, bath and shower stakeholders
- Consumer engagement with soap, bath and shower products
- Attitudes and behaviors toward soap, bath and shower products
- Consumer trial and interest in nontraditional soap, bath and shower innovations and select claims



Even as cleansing is incorporated into beauty and health regimens, proliferating benefits are put under the scrutiny of multifunctionality, value and efficacy.

## Overview

Over a quarter of consumers have traded up at least one soap, bath and/or shower product in the past year. The SBS market tells two competing tales. Firstly, the category is becoming beautified. As wellness themes and aspirations impact hygiene, functional cleansing is reframed as multifunctional routines, wherein consumers not only seek to clean themselves, but also seek to improve their skin concerns, their moods and their overall wellbeing. This bodes well for specialized benefits and accessories that can speak to these larger goals.

At the same time however, usage remains relatively flat. As consumers aspire toward better cleansing, greater attention is paid toward leave-on products in their routines. Proliferating, secondary benefits continue to compete on value, efficacy and convenience. Looking ahead,

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category stakeholders should expect greater relevancy to also put their roles in consumers' routines under greater scrutiny.

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# Report Content

## EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

## THE MARKET

### Market context

#### Market drivers

- Improved outlooks on financial futures and mental wellbeing may nudge spend...
  - Graph 1: opinions on financial future, 2024
- ...but relevancy comes with greater pressure on quality and value
- Sustainability moves beyond packaging and water conservation at-faucet
- Reinvigorate sustainable interests with harmless beauty narratives

#### Market size and forecast

- Retail sales and forecast of soap, bath and shower products
- Retail sales and forecast of soap, bath and shower products, at current prices
- Retail sales and forecast of soap, bath and shower products, at inflation-adjusted prices

#### Segment performance

- Liquid body wash and bar soap continue to provide modest growth
- Hand cleansing and sanitizing continue to stall
- Bath products are expected to face headwinds after self-care-motivated tailwinds

#### Market and brand share

- Multi-outlet sales of soap, bath and shower products, by leading companies
- Major players maintain relevancy to consumer interests
- Multi-outlet sales of bar soap, by leading companies and brands
- Multi-outlet sales of liquid body wash, by leading companies and brands
- Multi-outlet sales of liquid hand soap, by leading companies and brands
- Multi-outlet sales of hand sanitizers, by leading companies and brands
- Multi-outlet sales of bath fragrances/bubble bath, by leading companies and brands

## COMPETITIVE STRATEGIES & OPPORTUNITIES

- Competition grows among masstige and prestige offerings
  - Graph 2: SBS price positioning, 2019-23
- Skin health and ingredient-forward claims become more widely accessible
  - Graph 3: select top claims, by beauty price positioning, 2019-23
- Consider cleansing as part of larger "maintenance routines"
- Reframe daily cleansing as skin and grooming maintenance
- Provide elevated exfoliation
- Smarter health routines translate to smarter cleansing tech

## CONSUMER INSIGHTS

### Consumer fast facts

### Usage & key audiences

- With the exception of bath, stagnant segment growth remains anchored by functional perceptions
  - Graph 4: usage of shower products, 2021-23
- As with shower, hand hygiene stabilizes
  - Graph 5: usage of hand cleansing & sanitizing products, 2021-23
- Modest growth in bath speaks to the lasting impact of self-care priorities
  - Graph 6: Usage of bath products, 2021-23
- Audience opportunity: connect expanding cleansing benefits to men
  - Graph 7: select usage, by generation and gender, 2023
- Infuse functional men's body cleansing claims with wellness & purpose
- Audience opportunity: win over parents who are major category participants
  - Graph 8: Using products more often than a year ago, by parental status
- Be a partner for parental self-care
- Audience opportunity: diversify secondary benefits to encompass diverse needs for cleansing and care
  - Graph 9: use of select SBS products, by race, 2023
- Expand claims within preferred formats to meet specialized needs

### Purchase influencers

- Fragrance drives purchase across all segments
  - Graph 10: select purchase drivers, by segment, 2023
- Don't neglect the functional appeal of scent and cleanliness
  - Graph 11: preference for long-lasting clean among shower product consumers, any rank, 2023
- Leverage interest in deep-cleansing to promote new points of value and quality

# Soap, Bath and Shower Products – US – 2024

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- Gentle cleansing becomes increasingly non-negotiable

## Cleansing format preferences

- Moisture-retention is top of mind
- Hydration is particularly motivating among consumers of color
  - Graph 12: preference for select formats and benefits, by race, 2023
- Deliver on long-lasting, deep hydration
- Promote chemical exfoliation for gentle cleansing, or combine both for best of both worlds
  - Graph 13: overlapping use of physical & chemical exfoliation, 2023
- Connect eco-conscious shoppers to solid format benefits
  - Graph 14: preference for solid formats, by preference for eco-friendly products, 2023
- Target convenience and added skin health propositions to boost solid cleansing profiles

## Attitudes & behaviors

- Body cleansing becomes individualized and elaborate
- Acknowledge multifunctional, differentiated routines for beauty and health
  - Graph 15: select shower occasions and goals, 2023
- Design SBS solutions for specific occasions
- Colder showers gain traction for their health benefits
  - Graph 16: taking colder baths/showers for health benefits, 2023 vs 2024

## Shopping

- Anticipate greater selectivity within the category
  - Graph 17: trial and selectivity in SBS shopping, by gender and age, 2023
- Trading-up is likewise driven by younger audiences
  - Graph 18: select SBS shopping behaviors and attitudes, by age, 2023
- Continue to raise SBS profiles with post-wash benefits and connection to leave-on categories

## Trial & interest in nontraditional products

- Kid and teen-friendly products gain steam
  - Graph 19: trial and future intent toward select innovations and claims, 2023
- Anticipate competition for teen/tween SBS from mass-market and indie brands
- Skin conditions and professional approval will become primary purchase drivers
  - Graph 20: "Have tried and would use again" – select skin-forward innovations and claims, 2023
- Extend intimate cleansing to mature audiences
  - Graph 21: trial and future intent toward products specifically designed for cleansing intimate areas, 2023
- Bring intimate cleansing into total wellness practices

## APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast
- Forecast fan chart
- US value fan chart: total market

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