

ETHICAL LIFESTYLES – GERMANY – 2021

While the pandemic has brought hygiene to the fore, Germans still value ecological efforts from brands. Showcasing genuine commitment to social equality will drive growth post-pandemic.



Dr. Christina Wessels,
Category Director,
Lifestyles, Health &
Wellbeing, Household
Care & Leisure, Germany



Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Mintel's perspective

The impact of COVID-19 on ethical lifestyles

- COVID-19's impact on ethical lifestyles and German consumer behaviour

Market context

- COVID-19's impact on ethical lifestyles
- Government's action to reduce food waste

What consumers want and why

- Consumers want to: save money when choosing ethical
- Consumers want: more "green" tech products
- Consumers want: brands to show commitment to social equality
 - Graph 1: consumers' attitudes on whether brands should be involved with campaigning for social equality, by age, 2021

Opportunities

- Convince consumers with packaging-free spaces
- Appeal with ethical BPC and household products that are better for your health
- Innovate with the local movement in mind
- Quick download resources

MARKET DRIVERS

COVID-19 and the economy

- COVID-19: market context
- The impact of COVID-19 on the German economy
 - Graph 2: key economic data, in real terms, 2019-22

COVID-19, the environment and climate change

- The impact of the outbreak on the environment
- Greenhouse gas emission saw a decline in 2020

Food waste

- Government actions to reduce food waste

Plastic and packaging waste

- The changing role of packaging

Social issues

- Ethical retailing in the spotlight
- Companies' role in fighting social issues

WHAT CONSUMERS WANT AND WHY

The impact of COVID-19 on consumer behaviour

- Environmentally friendly habits set to grow further
- Take the next step in carbon footprinting
- Optimise the use of resources
- Hygiene concerns can lead to a greater focus on food safety

Considering environmental impact in decision making

- Most consumers say they consider the environmental impact in their decisions
- Create messaging that concerns all age groups
 - Graph 3: how often consumers consider the environmental impact in their decision making, by age, 2021
- Eco-conscious behaviour – a question of financial health?
 - Graph 4: how often consumers consider the environmental impact in their decision making, by financial situation, 2021
- Stand out with a good value for money proposition
- Prove your eco-efficacy value
- Incentivise shoppers to make sustainable decisions

Reasons for considering the environmental impact in decision making

- Food waste is number one reason for sustainable decision making
 - Graph 5: reasons for considering the environmental impact in decision making, 2021
- Utilise online grocery shopping to plan ahead and reduce food waste
- Be inspired by the "Rettomat" at Frankfurt Central Station
- Put planetary health in focus
 - Graph 6: consumers who consider the environmental impact in their decision making to help protect the planet, by age, 2021
- Guide green behaviours with apps and tips
- Help consumers help the planet
- Emphasise the aspect of saving money
- Combine health and ecological benefits

Frequency of selected environmentally friendly habits

- Most Germans compost food waste
 - Graph 7: frequency of selected environmentally friendly habits, 2021
- Encourage the young to compost food waste more often
- Solve confusion about compostable packaging
- Young females most likely to pay more for eco-products
 - Graph 8: frequency of consumers paying more for eco-friendly options of products, by gender and age, 2021
- Convince consumers with an authentic ecological standing
- Second hand shopping on the rise
 - Graph 9: frequency of consumers buying clothes/accessories second hand, 2021
- Emphasise the money-saving aspect of second hand
- Fashion retailers are tapping into second hand

Environmental and ethical attitudes

- The surge in waste caused by the pandemic is in the spotlight
 - Graph 10: consumers' environmental attitudes, 2021
- Increased hygiene calls for heightened protection of the environment
- Need for ecological positioning for disinfection products
- Travel operators: capture the zeitgeist of environmental healing
 - Graph 11: consumers' attitudes on whether the COVID-19 outbreak has shown how damaging travel is to the environment, 2021
- Travel operators: capture the zeitgeist of environmental healing
- Invest in sustainable travel solutions
- Deutsche Bahn positions itself as 'Germany's fastest climate protector'
- Address the problem of e-waste
- Tech brands: cater to Germans' environmental concern
- Second-hand tech devices as-good-as-new and with warranties
- Utilise sustainability benefits to drive smart home adoption
- Half of consumers want companies to stand up for social issues
 - Graph 12: consumers' ethical attitudes, 2021
- Show commitment to social equality
- Smaller businesses seem more ethical

Expectations of an ethical company/brand

- Consumers expect companies to protect the environment
 - Graph 13: what consumers expect from brands/companies to be ethical, 2021
- Become a chosen partner for those looking to make a difference
- Undertake tangible improvements for the environment

Ethical Lifestyles – Germany – 2021

- Retailers trialling packaging-free aisles
- Rethink refill stations to ensure high hygiene standards
- Increase reusability and recyclability
- Advocate fair working conditions
- Innovate with the local movement in mind
 - Graph 14: consumers who think that an ethical company/brand is one that is involved in the local community, 2021
- Promote growing and foraging to help consumers positively impact their local environment

Ethical considerations

- FMCG brands most evaluated for their ethical standards
 - Graph 15: where consumers consider how ethical a company/brand is before buying their product, 2021
- Use format to differentiate green NPD
- Use solid formats to reconceptualise household care
- Position eco-friendly beauty and household products as better for your health
- Foodservice: prove your environmental commitment
- Reusable food containers gain momentum – VYTAL
- Create offers for second hand furniture
- Home retailer Otto commits to more sustainability in their product offer
- The time has come for green finances

LAUNCH ACTIVITY AND INNOVATION

Food

- Sustainable and environmentally friendly packaging claims see the greatest increase
 - Graph 16: food launches by top five claims, 2015-16 vs 2020-21
- Plant-based products will continue to gain ground
 - Graph 17: share of food and drink launches with a vegan/no animal ingredients claim, 2016-21

Beauty & personal care products

- More than one in three BPC products has a vegan claim
 - Graph 18: BPC launches with selected ethical and sustainable claims, 2015-16 vs 2020-21

Household care products

- Products with environmentally friendly packaging and higher recyclability will continue to grow
 - Graph 19: household launches by top five claims, 2015-16 vs 2020-21
- Refill stations as an answer to packaging waste
- Solid formats offer value and sustainability

Advertising and marketing activity

- Vegan F&D brand promotes its vegan product range

- EDEKA wants to commit to more sustainability
- DM launches environmentally neutral product range
- adidas shows its commitment to become "greener"

APPENDIX

Appendix – abbreviations, consumer research methodology and language usage

- Abbreviations
- Consumer research methodology
- A note on language

About Mintel Reports: Germany

Access our reports now and get the most accurate, credible and powerful data, insights and analysis. Mintel Reports Germany gives you everything you need to know about what German consumers want and why.

In each report, we're analysing the market, new product innovations and the competitive landscape, as well as consumer behaviours across Germany. Our local analysts, supported by our team of global experts then translate it into what it means for you.

What makes us unique?

- ✔ A 360-degree view of German markets
- ✔ Experienced analysts based in Germany
- ✔ Expert-led support from global category experts

How Mintel Reports Germany will help your business grow:

01

Identify future opportunities by understanding what German consumers want and why

02

Make better decisions faster by keeping informed on what's happening across your market

03

See the trends and innovations impacting Germany both on a local and global level

BUY THIS REPORT NOW

€2600.00 | £2195.00 | \$2995.00*

store.mintel.com | store@mintel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

MINTEL

Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a German licensed market survey agent ([See Research Methodology for more information](#)).

Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

Published by Mintel Group Ltd

www.mintel.com

email: store@mintel.com

Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
Germany	+49 211 2409023
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850