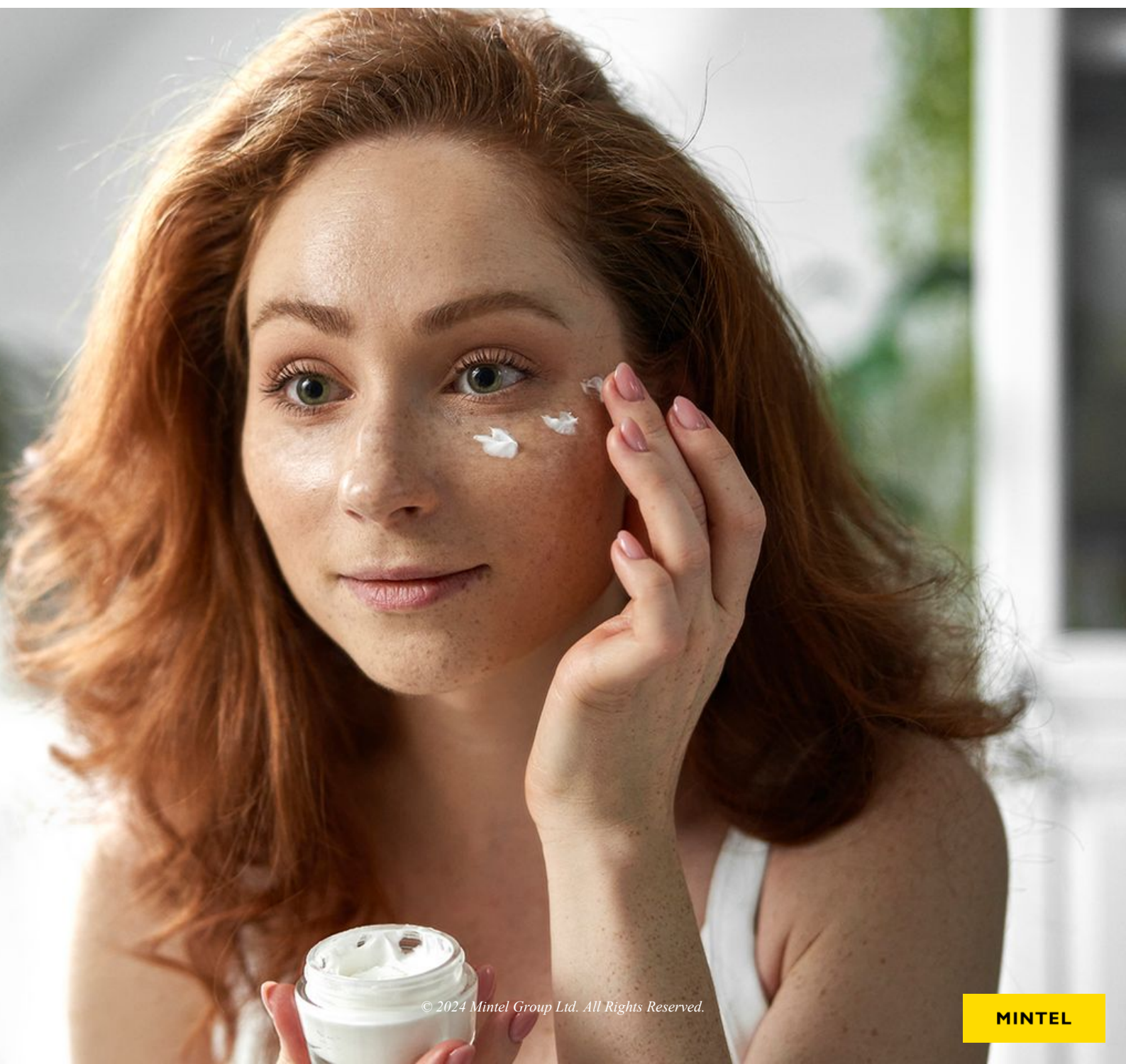


FACIAL SKINCARE FORMAT AND INGREDIENT TRENDS – GERMANY – 2023

Germans prioritise active ingredients and seek proof of efficacy; regulatory changes, such as retinol restrictions, pose challenges and opportunities for brands.



Susanne Krenz, Principal Research Analyst - Beauty and Personal Care



Facial Skincare Format And Ingredient Trends - Germany - 2023

This report looks at the following areas:

- The German skincare consumer's primary skin concerns, and how this correlates with facial skincare usage
- Interest in facial skincare ingredients and attitudes towards facial skincare formats
- How launch activity compares to consumer interest in select facial skincare ingredients and formats
- Where and how users obtain skincare information, and how brands can support
- What brands can do to stand out, as products calling out hero ingredients saturate the market



Germans prioritise active ingredients and seek proof of efficacy; regulatory changes, such as retinol restrictions, pose challenges and opportunities for brands.

Overview

72% of Germans with any skin concern actively look for products with certain ingredients, showing a clear link between skin issues and ingredient interest. At the same time, they are unclear on the specifics; for example, 63% of users with dry skin don't seek out hyaluronic acid, despite the ingredient's ubiquity. **There is more to be done in the way of education,** and product packaging and social media partnerships play a crucial role.

Even amid economic challenges, many facial skincare shoppers prioritise active ingredients and long-lasting results over price. The German skincare consumer is informed and discerning,

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which makes them open to innovation, but also means that **brands need to do more to prove product efficacy and maintain customer loyalty**. This poses opportunity and risk in equal measure.

The same can be said of **recent and impending regulatory changes**, for example pertaining to the restriction of retinol in skincare. Brands that **stay abreast of such legislation**, ideally while striving to improve product stability and efficacy, will be able to keep consumers engaged in a highly saturated market.

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Report Content



EXECUTIVE SUMMARY

- The five-year outlook for facial skincare formats and ingredients

Market context

- German skincare users prioritise efficacy
- Social media thrives as sustainability struggles

Opportunities

- Play matchmaker for confused consumers
- Focus on underrepresented ingredients
 - Graph 1: consumer interest in select facial skincare ingredients vs launches, 2022-23
- Leverage interest in natural ingredients to transition to lab-made
- Innovate to outpace instability and legislative changes

MARKET DRIVERS

The German economy

- Economic recovery to follow the slowdown in 2023
 - Graph 2: key economic data, in real terms, 2019-25
- The inflation rate is slowly bouncing back to more conventional levels
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and expenditure
 - Graph 3: financial confidence index, 2022-23
- Financial pressures sharpen skincare spending priorities
- German skincare consumers want to see results
- Influencer endorsements affect consumer trust
- Sustainability remains a balancing act

WHAT CONSUMERS WANT AND WHY

Usage of facial skincare products

- Usage of caring products beats that of cleansing products and treatments
 - Graph 4: usage of facial skincare products, 2023
- The gap between caring and treatment products widens with age
- Communicate the benefits of treatments to over-55s

Skin concerns

- Dryness, signs of ageing and sensitivity top the list of concerns
 - Graph 5: facial skin concerns, 2023
- Cater to dry and sensitive skin
- Convince those with dry skin to embrace cleansing
- Emphasise the benefits of a healthy skin barrier to adults with oily skin
- Acne and spots are a concern well into adulthood
 - Graph 6: consumers concerned with acne/spots, by gender and age, 2023
- Combatting wrinkles and acne amidst regulatory changes
- Stress the importance of prevention to women with trouble-free skin

Interest in facial skincare ingredients

- A third of skincare users seek out hyaluronic acid, vitamin C
 - Graph 7: facial skincare ingredients of interest, 2023
- Hydrating and anti-ageing ingredients are front of mind
- Sufferers connect skin concerns and active ingredients...
- ...but they're unclear on the details
- Boost collagen production with natural active ingredients
- Highlight the skin-friendly benefits of bio-retinols
- Connect ceramides and skin health to pique interest
- A third of skincare users neglect ingredients

Information sources for facial skincare ingredients

- Packaging, networks and expertise shape consumer choices
 - Graph 8: sources of facial skincare ingredient information, 2023
- Cater to the conscious consumer
- Men and women value packaging, human connections and digital influence differently
 - Graph 9: select useful sources of skincare ingredient information, by gender, 2023
- Enhance conversations with family and friends using comparison tools
- Leverage social media partnerships
- Partner with trusted third parties to bolster brand sources

Facial skincare ingredient preferences

- Natural ingredients take the lead
 - Graph 10: interest in facial skincare ingredients, 2023
- The German skincare consumer is informed and discerning
- Clear preference for natural over lab-made
- Allow consumers to shop by ingredient concentration
- Look to APAC for deeply penetrating messaging

Facial Skincare Format and Ingredient Trends – Germany – 2023

- Engage men with traceable, lab-engineered and patented ingredients
 - Graph 11: select facial skincare product preferences, by gender, 2023
- Explore marketing strategies that showcase the use of traceable ingredients
- Cater to differences in digital propensity and address a lack of age diversity

Behaviours towards facial skincare

- Lightweight skincare reigns supreme
 - Graph 12: behaviours towards facial skincare, 2023
- Germans embrace format innovation and environmental awareness
- Give oils an image change by breaking beliefs around breakouts
- Position tools as a hygienic way to apply products
- Cater to under-55s showing interest in holistic remedies
- Go beyond recyclable packaging to raise the sustainability bar

LAUNCH ACTIVITY AND INNOVATION

- Hyaluronic acid, niacinamide and ceramides lead in launches
 - Graph 13: select ingredients in facial skincare launches, 2018-23
- Has hyaluronic acid reached its peak?
- Several popular ingredients are underused
 - Graph 14: consumer interest in select facial skincare ingredients vs launches, 2022-23
- Mine still-niche ingredients to cater to consumer demand
- Creams dominate and serums rise, while balms and oils take a backseat
 - Graph 15: launches in facial skincare products, by top 5 formats, 2018-23
- Gel/jelly launches increase as scrubs, water-based cleansers decline
 - Graph 16: launches in facial cleansing products, by top 5 formats, 2018-23
- Innovate in delivery systems and formats to stand out in a crowded market
- Harness the market potential of ashwagandha
- Exosomes have premium potential

APPENDIX

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Abbreviations
- GNPD data links
- Consumer research methodology
- A note on language

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