

FACIAL SKINCARE - GERMANY - 2020

German consumers side-step anti-aging wanting healthy skin more. To keep pace with category growth, brands should prepare now for the microbiome-driven future.



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Report Content

EXECUTIVE SUMMARY

- Mintel's perspective

Market context

- Facial skincare market experiences fast growth
- Facial skincare market experiences fast growth
- Age-responsive skincare to unlock opportunities

Mintel predicts

- Performance-driven NPD to drive growth long-term
- Get ahead of skincare mistrust
- Get ahead of skincare mistrust
- Masks are the strongest growing segment

What consumers want, and why

- Consumers want: appearance through health
 - Graph 1: top three skin concerns by face/neck area, September 2019
- Consumers want: stability
 - Graph 2: usage of cleansing products by type, September 2019
- Consumers want: stability
 - Graph 3: usage of facial skincare products by type, September 2019
- Consumers want: proof
- Consumers want: proof
- Consumers want: efficiency
 - Graph 4: usage behaviours in facial care, September 2019

Opportunities

- Leverage health to lower barriers
- Leverage health to lower barriers
- Promote multi-tasking products
- Promote multi-tasking products
- Diversify with skin enhancement

The competitive landscape

- Big brands dominate in facial skincare
- Top companies face growing competition

- Quick download resources

MARKET DRIVERS

- Consumption persists despite economic slowdown
- Aging society places sensitive demands on anti-aging skincare
 - Graph 5: [no title]
- Aging society will drive age-adaptive skincare
- Aging society will drive age-adaptive skincare
- Pragmatic lifestyle steers healthy beauty routine
- Pragmatic lifestyle steers healthy beauty routine
- Climate awareness calls on skin defence
- Sustainability is not optional
- Being content with less
- German market is leading force in safe & effective science
- German market is leading force in safe & effective science
- Prove it, don't just review it

WHAT CONSUMERS WANT, AND WHY

Areas of concern on face/neck

- Germans consumers don't sweat the small stuff
 - Graph 6: top three skin concerns by face/neck area, September 2019
- German consumers lead in skin acceptance across the region
 - Graph 7: Europe - concern over eye area/skin by country, September 2019
- Skincare is about the big picture of health
- Skincare is about the big picture of health
- Skincare is about the big picture of health
- Women set the tone for concerns
 - Graph 8: facial skin concerns by gender, September 2019
- Men are worried about pores
 - Graph 9: top facial/neck skin concern for males, September 2019
- Mintel Trend: Influentials
- Young adults have heightened concerns
 - Graph 10: facial skin concerns, by 16-24 year olds, September 2019
- Mintel Trend: On Display
- Pre-aging, adaptive care
- Eye/neck concerns challenge age-positivity

Usage of facial cleansing products

- Standard cleansers are etched into skincare routines
 - Graph 11: cleansing product usage by type, September 2019
- Women engage with broadest range of cleansers
 - Graph 12: usage of facial cleansing products by gender, September 2019
- Create usage occasions for balms and oils
- Create usage occasions for balms and oils
- Young men use face wash...older men stick to soap
 - Graph 13: usage of face wash and regular bar soap amongst men, by age, September 2019
- Cleansing-adjacent products pique young male interest
- Waste not, want not
- Non-traditional cleansing practices on the periphery
- Caring without cleansing
- Caring without cleansing
- Effective cleansing is not common knowledge

Usage of face care products

- Germans keep their facial care routine minimal
 - Graph 14: usage of facial skincare products by type, September 2019
- Germans hack skincare with treatments
- Germans hack skincare with treatments
- Skincare knowledge will make or break the collection
 - Graph 15: repertoire of facial skincare products by type, September 2019
- Sephora helps shoppers understand actives
- Maintaining engagement with age poses largest challenge
 - Graph 16: repertoire of facial skincare products by type, by age, September 2019
- Maintaining engagement with age poses largest challenge
- Women take a step back in their routines
 - Graph 17: female usage of facial skincare products, September 2019
- Women take a step back in their routines
- Environmental concerns shift shopping behaviour
- The Makery empowers consumers with DIY workshops
- Mintel Trend: Never Say Die
- Out with the new, in with the old
- Make skincare work harder
- Rethink masks to engage mature women

Changes in facial skincare routine/ behaviour

- Changes in facial skincare routine/behaviour
 - Graph 18: usage behaviours in facial care, September 2019
- Inside-out approach to skin health
- Inside-out approach to skin health
- Mintel Trend: Total Wellbeing
- Skin health opportunities
- Ecosystem of skin can bring consumers in
- Quick fixes to compensate for lifestyle
- Doctor-brands out of reach for most
- Doctor-brands out of reach for most
- Trial and error leaves older women unsatisfied
- Douglas teams up with Ave+Edam
- Young people are interested in anti-pollution
- Young people are interested in anti-pollution

LAUNCH ACTIVITY AND INNOVATION

- Companies selectively launch
 - Graph 19: NPD in the facial skincare market by ultimate company in 2019, 2017-19
- Active companies fight inflammation
- Companies rethink launch pace
- Companies rethink launch pace
- Premium NPD sees growth
- Rich creams are the new luxury
- Augustinus Bader x Victoria Beckham collaborate
- Doctor brands reconcile nature and science
- Doctor brands reconcile nature and science
- Innovation from top doctor brands
- Mid-range leverages doctor brand opportunities
- Top claims remain consistent
 - Graph 20: NPD in the facial skincare market, by leading claims in 2019, 2017-19
- Replace 'anti-aging' with healthy-aging NPD
- Cure-all claims position CBD well
- Metals shield healthy skin
- Antioxidants for environmental defence
- Brands experiment with vitamin C formats
- Sustainable packaging claims are a must

- Lifestyle brands make seamless transition to skincare
- Aussie beauty meets German mindset
- Multipurpose NPD has broad potential
- Cleanser textures in spotlight
- Brands use superfoods to promote skin nourishment
- Brands look to soften retinol's image
- Anti-aging claims target younger audiences
- Anti-aging claims target younger audiences
- Aesthetics treatments inspire NPD in Germany
- Skin texture effects have big potential
- Launches focused on brightening
- Workout skincare expands usage occasions

Advertising and marketing initiatives

- Seinz skincare for men
- Zalando Beauty launches in Switzerland
- NIVEA: Glow 2in1 Beauty Primer
- L'Oréal: Revitalift Laser Day Cream
- Rossmann: Schön für mich YouTube channel

MARKET SHARE

Retail market share of facial skincare by percentage, 2018-19

- Top companies face growing competition
- L'Oréal maintains its lead
- Beiersdorf shows value growth
- Indie players get ahead online
- Brands venture into K-beauty
- Drugstores import K-Beauty and export G-Beauty
- Kylie Cosmetics to shake up Coty

MARKET SEGMENTATION, SIZE AND FORECAST

- Research into skin health will overshadow anti-aging
- Positive outlook for facial skincare market

Retail value market shares of facial skincare, by segment, 2018-19

- Mask segment shows strongest growth in 2019
- Masks show the strongest value growth

- Cleansing is not a priority

APPENDIX

Appendix - products covered, abbreviations and consumer research methodology

- Products covered in this report
- Abbreviations
- Consumer research methodology

Appendix - market size and forecast

- Forecast methodology
- Forecast methodology - fan chart
- Market size and forecast - value

Market size and forecast – Value – Best- and worst-case, 2019-24

- Market size and forecast - value - best- and worst-case

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