

FRAGRANCES – GERMANY – 2019

The value of fragrances has been impacted by NPD from lower priced brands. The luxury sector can boost growth by focusing on sustainability and ingredient concerns.



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Report Content

EXECUTIVE SUMMARY

- Mintel's perspective

Market context

- Fragrances due to see modest growth in 2019
- Fragrances due to see modest growth in 2019
- An ageing population presents opportunities

Mintel predicts

- NPD can boost growth long term
- Address safety and eco concerns in NPD
- Prestige brands need to up the luxury quotient

What consumers want, and why

- Consumers want: familiarity
 - Graph 1: top three scent preferences, September 2019
- However, younger men challenge the norms
- Consumers want: mood enhancement
 - Graph 2: top three emotive benefits of fragrances, September 2019
- Consumers want: adaptability
 - Graph 3: agreement with selected statements, by age, September 2019
- Consumers want: transparency

Opportunities

- Challenge the stereotypes
- Challenge the stereotypes
- Educate the consumer
- Adopt a 360-degree approach to sustainability
- Offer customisation

The competitive landscape

- Brands dominate in fragrances
- Brands dominate in fragrances
- Brands dominate fragrances
- Unisex fragrance NPD rises
 - Graph 4: NPD in the fragrance market, by segment, 2015-19

- Quick download resources

MARKET DRIVERS

- German consumers face a tough economic climate
- Germany's ageing population poses a challenge
 - Graph 5: [no title]
- The race to fragrance transparency
- The race to fragrance transparency
- Natural is not always better
- Sustainability is in the spotlight in Germany
- Brands need to have a 360-degree approach to sustainability
- Health and wellness is top of mind
- Fragrance can tap into mindfulness trends

WHAT CONSUMERS WANT, AND WHY

Types of fragrance used

- Perfume is the preferred format in Germany
 - Graph 6: fragrance product usage by type, September 2019
- Fragrance usage is high...but lower than other regions
 - Graph 7: Usage of fragrance products in Germany, France, Italy and Spain, 2019
- Scented products retain appeal to German women as they age
 - Graph 8: female usage of perfume and scented body lotion/oil, by age, September 2019
- Older men in Germany engage more with body spray/mist than older women
 - Graph 9: usage of body spray/mist, by age and gender, September 2019
- Men use a greater range of fragranced products than women in Germany
 - Graph 10: repertoire of fragranced product types, by gender, September 2019

Preferred scent type

- Fragrance preferences largely follow gender norms in Germany
 - Graph 11: top three scent preferences, by gender, September 2019
- Fragrance preferences largely follow gender norms in Germany
- Younger men in Germany challenge gender norms
- Women in Germany have more scent preferences than men
 - Graph 12: repertoire of preferred scents, by gender, September 2019
- 2-in-1 fragrances could revitalise on-the-go scent

Emotive benefits of fragrance

- Fragrance can enhance mood in Germany
 - Graph 13: top three emotive benefits of fragrances, September 2019
- Attraction and romance are not the same
 - Graph 14: 'attractive' and 'romantic' as top three emotive benefits of fragrance, by gender, September 2019
- Femininity is important to older women in Germany
- Femininity is important to older women in Germany
- Power vs confidence
 - Graph 15: 'confident' and 'powerful' as top three emotive benefits of fragrance, by gender, September 2019
- Personalise fragrance experiences in Germany
- Personalise fragrance experiences in Germany
- Tap into mood
- Tap into mood
- Male shaving ritual calls for peace

Attitudes towards fragrances

- Attitudes towards fragrances in Germany
 - Graph 16: attitudes towards fragrances, September 2019
- Dialling up/down fragrance intensity could reach more users
- Dialling up/down fragrance intensity could reach more users
- Layering to impact scent perception
- Up the luxury quotient
- Up the luxury quotient
- Create more usage occasions for younger consumers
 - Graph 17: agreement with selected attitudes, by age, September 2019
- Create more usage occasions for younger consumers
- Unknowns in fragrance cause concern in Germany
- Technology is educating German consumers

LAUNCH ACTIVITY AND INNOVATION

- Coty leads NPD
 - Graph 18: NPD in the fragrance market by ultimate company*, 2017-19
- Coty targets new scent occasions in Germany
- L'Oréal promotes female empowerment in 2019
- Unisex fragrance NPD rises
 - Graph 19: NPD in the fragrance market, by segment, 2015-19
- Unisex launches spark new scent stories

- LVMH offers a new take on unisex
- Natural claims on the rise
 - Graph 20: NPD in the fragrance market, by leading claims categories*, 2017-19
- Brands highlight their botanical content
 - Graph 21: NPD in 'natural' fragrances, by 'natural' claim, 2017-19
- Not just natural, but responsibly sourced/made
- Clean movement and ingredient policing are on the rise
- Clean movement and ingredient policing are on the rise
- Natural perfumes use non-toxic positioning to earn trust in Germany
- Lush synergises natural and synthetic content
- Brands deepen their ethical commitments
 - Graph 22: NPD in 'ethical & environmental' fragrances, by leading 'ethical & environmental' claims*, 2017-19
- Ethical fragrance brands with a 360-view in 2019
- Berlin brand leverages ethical craftsmanship
- Berlin brands hone in on authenticity too
- Luxe and prestige brands make an NPD comeback in 2018
 - Graph 23: NPD in fragrances, by price positioning, 2015-19
- Premium brands play with format in 2019
- Premiumisation of masstige democratises luxury
- NPD in private label appeals to ethical fragrance shoppers
- Naturduft line from Alverde (DM)
- Nature-inspired scents on the rise
 - Graph 24: NPD in fragrances, by top 10 scent component groups*, 2017-19
- Wanderlust scent occasions

MARKET SHARE

- Prestige brands fare well in 2018

Retail market share of fragrances by percentage, 2017-18

- Top Coty brands decline as LVMH and L'Oréal refresh premium brands
- Coty plans to turnaround fragrance offering while competitors get ahead
- LVMH & L'Oréal invest in e-commerce in Germany
- Lancôme uses multi-device advertising strategy in 2018
- Private-label mass-market NPD is rising to the occasion

MARKET SEGMENTATION, SIZE AND FORECAST

- NPD can drive slow and steady growth to 2024

- Growth will be stunted in short-term as purse strings tighten
- Unisex fragrances could offer opportunity for growth in Germany

Retail value market shares of fragrances, by segment, 2016-18

- Men's segment shows renewed growth in 2018

APPENDIX

Appendix – Products covered, abbreviations and consumer research methodology

- Products covered in this Report
- Products covered in this Report

Abbreviations

- Abbreviations
- Consumer research methodology

Appendix – market size and forecast

- Forecast methodology
- Forecast methodology – Fan chart

Market size and forecast – Value, 2014-24

- 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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