

HAIR COLOURANTS – GERMANY – 2020

The pandemic has boosted the value of the category in 2020 as Germans have turned to at-home routines; however, growth will be short lived.



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Report Content

EXECUTIVE SUMMARY

A note on COVID-19

- COVID-19's impact on hair colourants and German consumer behaviour
- Mintel's perspective

The impact of COVID-19 on hair colourants

- COVID-19 drives short-term gains in hair colourants

Market context

- Lockdowns have little impact on BPC consumers
- Old habits die hard
- Online shopping is on the rise

Mintel predicts

- Closure of salons gives home hair colour a short-term boost
- Slow growth in the long term

What consumers want and why

- Consumers want: to experiment
- Consumers want: flexibility
- Consumers want: a little help from brands
- Consumers want: more sustainable options

Opportunities

- Reposition colouring for the pro-age revolution
- Use format to create new usage occasions
- Help consumers become experts
- Turn to the ocean for what's next in sustainability

The competitive landscape

- Leading companies benefit from ecommerce in 2020

Marketing mix

- The marketing mix for hair colourants in Germany
- Quick download resources

MARKET DRIVERS

- A return to lockdown
- Positive economic growth will resume in 2021
 - Graph 1: real GDP growth, 2008-21 (fore)
- The impact of COVID-19 on the German economy
- Motivation is low...
- ...but beauty routines offer an escape
- The rise of online shopping
- Germany's ageing population provides opportunities
 - Graph 2: population, by age group, 2014, 2019 and 2024 (est)
- Consumers embrace age positivity

WHAT CONSUMERS WANT AND WHY

The impact of COVID-19 on consumer behaviour

- Key shifts in consumer behaviour
- 'Lockdown light' has a lower impact on BPC

Natural hair colour

- Natural colour skews light
 - Graph 3: net of natural hair colour, September 2020
- Help over-55s transition to grey

Usage of hair colour

- Hair colouring remains a women's category
 - Graph 4: usage of hair colourant types, by gender, September 2020
- Young men can be encouraged to experiment
- Colouring habits are infrequent
 - Graph 5: frequency of hair colouring, by gender, September 2020

Reasons for colouring hair

- Cost of professional services drives at-home colouring
 - Graph 6: reasons for colouring hair at home, September 2020
- Mintel Trend Survival Skills
- Brands use social media to educate in 2020
- Women cover grey, men enhance their colour
 - Graph 7: reasons for colouring hair at home related to covering grey or changing/enhancing colour, by gender, September 2020

Interest in hair colourant innovations

- Made for me
 - Graph 8: interest in hair colour innovations, September 2020
- Mintel Trend Make it Mine
- Brands tap into customisation in 2020
- Men could do with some help
 - Graph 9: interest in services that make hair colouring easier, by gender, September 2020
- Target touch-up products for on-the-go use

The impact of COVID-19 on hair colouring

- Colouring at home becomes a safer alternative
 - Graph 10: changes to hair colouring habits since the outbreak of COVID-19/coronavirus, September 2020
- Why colour?
- The pandemic drives experimentation...
- ...but trial tools need improvement
- Renewed focus on environmental issues

LAUNCH ACTIVITY AND INNOVATION

- Brands focused on range extensions in 2019
 - Graph 11: NPD in hair colourants, by launch type, January 2017-October 2020
- New products go beyond colour
- Colour claims remain most important
 - Graph 12: top claims in hair colourants NPD, January 2017-October 2020
- Make it long-lasting – but temporarily so
- Quick application methods
- Incorporating colour into new occasions
- The focus is on ingredients
- Sustainability: packaging and beyond
- Kao supports the 'Smart-Box' project
- Coty slows down NPD in 2020
 - Graph 13: ultimate company shares of hair colourants NPD, top six companies, January 2018-October 2020
- Henkel strengthens its professional offerings in 2020
- Rossmann taps into vegan trends
- NPD in root touch-up is strong, while usage is low

Advertising and marketing activity

- Henkel targets the online shopper
- Kao helps salons recover

- L'Oréal launches smartphone advert

MARKET SHARE

Retail value market shares of hair colourants, by ultimate companies and others, 2018-19

- Henkel and L'Oréal dominate value sales in hair colourants
- Henkel and L'Oréal dominate market shares

MARKET SEGMENTATION, SIZE AND FORECAST

Forecasting during the COVID-19 pandemic

- rem
- Home hair colourants see a boost in 2020
- A note on forecast in response to COVID-19

Retail value market shares of hair colourants, by segment, 2018-19

- Permanent colour dominates
- Germans are playing with their colour

APPENDIX

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

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

Appendix – market size and forecast

- Market size and forecast – value

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