


HAIR COLOURANTS – GERMANY – 2022

The new normal births a hybrid approach as consumers space out salon visits with at-home colouring. Rising inflation presents an opportunity for the category.



Susanne Krenz, Principal Research Analyst - Beauty and Personal Care



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This report looks at the following areas:

- The impact of COVID-19 and rising inflation on at-home hair colourants
- Usage and purchase of at-home hair colourants in the last 12 months, which has been largely flat
- Barriers to usage, with disinterest in changing hair colour being the main culprit
- The purchase journey including purchase locations (online/offline as well as specific outlets), with drugstores far ahead of the other distribution channels
- Interest in innovation, eg health-boosting and hair-strengthening ingredients as well as opportunities for personalisation
- New product development and resulting opportunities, L'Oréal's Colorsonic being the standout



The new normal births a hybrid approach as consumers space out salon visits with at-home colouring. Rising inflation presents an opportunity for the category.

Overview

59% of German hair colourant users consider their **DIY results to be on par with professional treatments**. Innovations like L'Oréal's Colorsonic simplify the process even more and carry the potential to further enhance consumer satisfaction.

As a result of rising inflation, **31% of Germans** were **cutting back on non-essential spending** as of January 2022. This bodes well for at-home hair colourants since many consumers will be tempted to skip salon visits going forward.

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Many Germans simply **don't wish to change their hair colour** (57%) or are **transitioning to grey** (22%). Combined with their **preference for simple beauty and grooming routines**, it will be a challenge for brands to convince them to experiment with colour.

84% of at-home hair colourant users report being happy with their results. At the same time 36% of Germans are interested in at-home hair colourant products that are personalised for their hair type; 29% want customised colour. The category has a good standing with consumers and **personalisation especially offers excellent growth opportunities**.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for hair colourants

Market context

- Value focus increases amid rising costs
- For brands, transparency is the best defence
- Germans keep it simple

Mintel predicts

- Market size & forecast
- Value sales will level out
- Growth to stall as consumers adjust to post-pandemic life

Opportunities

- Help consumers to save
- Promote (scalp) health claims
- Offer tailored solutions
- Highlight the benefits of AR
- Target women for premiumisation

The competitive landscape

- Henkel and L'Oreál continue to dominate
- Innovation and DTC sales drive growth
- Quick download resources

MARKET DRIVERS

- German economy hit hard by COVID-19 disruptions
- Strong post-COVID-19 bounceback followed by a period of slower growth
 - Graph 1: key economic data, in real terms, 2019-23
- Cost of living squeeze looms large
- Win over consumers with transparency
- Fuss-free routines leave little room for experimentation

WHAT CONSUMERS WANT AND WHY

Germans' natural hair colour

- Blonde and brown hair dominates
 - Graph 2: consumers' natural hair colour, 2021

Usage of at-home hair colour

- Usage of at-home hair colour is flat
 - Graph 3: usage of hair colourant types, 2020 and 2021
- Stress cost effectiveness to boost purchases

Barriers to purchase

- Overcoming the colour hurdle is a key challenge
 - Graph 4: barriers to purchase for at-home hair colour, 2021
- Support consumers wanting to go grey
- OhMyGold! Simone's story
- Hairprint offers a dye-free alternative
- Help 16-24 year olds with colouring advice
 - Graph 5: consumers who don't know which colour would suit them, by age, 2021
- Brick-and-mortar can leverage the human element
- Dispel worries around scalp health

Purchase locations

- Consumers prefer to shop in-store
 - Graph 6: purchase channels for hair colourants, 2021
- Slow but steady climb for ecommerce
 - Graph 7: % of consumers who have been shopping more online since the COVID-19 outbreak, 2020-21
- Better position ecommerce with AR and unique ranges
- Drugstores reign supreme
 - Graph 8: purchase locations for hair colourants, 2021
- dm, Rossmann & Co are still on the fast track
- Extend supermarket ranges

Purchase journey

- Brand loyalty is strong
 - Graph 9: purchase factors for at-home hair colour, 2021
- Help consumers to branch out
- Offer customisation across the purchase journey
- Come Shade or Shyne

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- Support men in colour choice and application
 - Graph 10: propensity to procure colouring advice, by gender, 2021
- Highlight the advantages of AR

Interest in innovation

- Health focus steers innovation
 - Graph 11: consumer interest in innovation in hair colourants, 2021
- Nourish the scalp
- Focus on ingredients
- Strengthen hair and minimise damage
- Offset waste and harsh ingredients
- Tap into food to boost natural claims
- Colour without compromise
- The limits of natural hair colour
- Target women for premiumisation
 - Graph 12: consumers interest in hair colour that..., by gender, 2021

Attitudes to hair colourants

- Consumers become 'prosumers'
 - Graph 13: attitudes to hair colourants, 2021
- A new hybrid approach to hair colouring
- Saving money will remain a priority
- Streamline colour application

LAUNCH ACTIVITY AND INNOVATION

- Products for 'prosumers'
- Long-lasting maintains relevance
- Botanical/herbal claims are palatable
- Home-grown launches trump competition from abroad
- L'Oréal revolutionises DIY colouring
- Kao responds to rise in at-home lightening
- dm relaunches its own-label offering

Advertising and marketing activity

- Amazon stirs the pot with flagship hair salon
- Henkel opens its first D2C concept store
- Got2b goes hiphop
- Syoss enlists Lena Gercke
- Not perfect, just Men Perfect

MARKET SHARE

Retail market share of hair colourants, by value, 2020-21

- Henkel and L'Oreál in the lead
- Innovation drives changes in market share
- Smaller players are doing well

MARKET SIZE, SEGMENTATION AND FORECAST

- Growth to level out beyond 2023
- Flatter growth as consumers adjust to new normal

Market segmentation

- Second pandemic year brings modest growth
- Temporary hair colour outperforms permanent

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 central forecast methodology

- Forecast methodology
- Forecast methodology – fan chart
- Market size and forecast – value
- Market forecast and prediction intervals – value

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