

HAIRCARE – GERMANY – 2019

Adapting to changing population dynamics and rising environmental concern of German consumers will be crucial for the market to continue to see positive growth.



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Director – German
Reports



Report Content

EXECUTIVE SUMMARY

- Mintel's Perspective

Market Context

- Haircare to see steady growth in the next 5 years
- Haircare to see steady growth in the next 5 years
- Stressed consumers are opening up new opportunities to cash in on

Mintel Predicts

- NPD focused on consumer needs will be key to future growth
- Environmental considerations will be more important
- Styling needs strong NPD to remain relevant
- Brands need to adapt to changing demographics

What consumers want, and why

- What consumers want: convenience
 - Graph 1: usage of haircare products compared with the last 12 months, September 2019
- What consumers want: caring
 - Graph 2: reduced and non-usage of styling products compared with last 12 months, September 2019
- What consumers want: proof
- What consumers want: proof
- What consumers want: familiarity
 - Graph 3: usage and interest in haircare ingredients, September 2019

Opportunities

- Focus on seniors, not just millennials
- Ethnic population opens up new target groups
- Target the stressed consumer

The competitive landscape

- Big brands dominate the haircare category
- Big players lead market share in haircare
- Henkel leads styling, yet losing to L'Oréal and own-labels
 - Graph 4: leading hair styling manufacturers by percentage, 2017-2018
- Quick download resources

MARKET DRIVERS

- Economic uncertainty could impact on buying behaviours
 - Graph 5: GDP by quarter, Q1 2016–Q3 2019
- Ageing society creates opportunities for age-related concerns
 - Graph 6: [no title]
- Catering to senior consumers will drive long-term growth
- Increasingly ethnically diverse population calls for targeted offerings
- Digitalisation adds great value for consumers
- Digitalisation can aid consumer discovery
- Sustainability is top of mind
 - Graph 7: beauty/grooming products people are interested in, 2019
- Circular beauty: a movement, not a trend
- Circular beauty; a movement not a trend
- Mindfulness is increasingly penetrating into beauty
 - Graph 8: beauty/grooming products people are interested in, 2019
- How haircare brands can capitalise on mindfulness

WHAT CONSUMERS WANT, AND WHY

Usage of haircare products

- Shampoo by far the most commonly used product
 - Graph 9: usage of haircare products compared with the last 12 months, September 2019
- Strongest and increased usage in shampoo
 - Graph 10: increased usage of shampoo amongst 16–24s, by gender, September 2019
- Young are men increasingly looking to scalp protection
- Young are men increasingly looking to scalp protection
- Older men can be encouraged to be proactive
 - Graph 11: scalp treatment usage amongst men, by age, September 2019
- Haircare can take inspiration from skincare
 - Graph 12: daily beauty and grooming priorities, by gender, 2019
- Styling is under penetrated
 - Graph 13: usage of styling products compared with last 12 months, September 2019
- Styling in daily routine has lower priority in Germany
 - Graph 14: daily hair washing and styling priorities, by select countries, 2019
- Boost innovation in styling to attract new users
- Older women are engaged in styling
 - Graph 15: any usage of hairspray and styling mousse or foam amongst women, by age, September 2019

- Mintel Trend: Life Hacking
- Mintel Trend: Life Hacking

Purchase of haircare products

- Germans are taking haircare purchases in their own hands
 - Graph 16: purchase of haircare products, by gender, September 2019
- Different retail environments preferred by men and women
 - Graph 17: in-store retailers where consumers typically buy from, by gender, 2018
- Online shopping is equally attractive for both genders
 - Graph 18: online retailers where consumers typically buy from, by gender, 2018

Purchase decision-making

- Hair type and end result influence women's purchase decisions
- Better understanding hair type can drive trial
- Better understanding hair type can drive trial
- Young women decide based on hair length
- Young women decide based on hair length
- Scalp concerns drive purchase in men
 - Graph 19: select haircare purchase factors amongst men, by age, September 2019
- Mintel Trend: Prove It

Interest in new ingredients

- Interest in haircare products with new ingredients
 - Graph 20: usage and interest in haircare ingredients, September 2019
- SPF appeals most, whilst Charcoal least
- SPF appeals most, whilst Charcoal least
- Mintel Trend: Prepare for the Worst
- Germans have a cautious approach to salicylic acid
- Young women show high interest in anti-aging ingredients
 - Graph 21: usage and interest in selected haircare ingredients amongst women, by age, September 2019

LAUNCH ACTIVITY AND INNOVATION

- Category innovation rises
- NPD targets care over style
 - Graph 22: hair products NPD, by subcategory, 2015-19
- Styling that cares
- Better for you, better for everyone
 - Graph 23: NPD in hair products, by claims category, 2017-19
- Better for you, better for everyone

- Love Beauty and Planet range links beauty with environmental consciousness
- Brands eliminate the 'nasties'
 - Graph 24: 'free from' hair product NPD, by 'free from' claim, 2017-19
- Brands eliminate the 'nasties'
- German hair products get the 'clean' treatment
- Environmental claims gain ground
 - Graph 25: 'ethical and environmental' hair product NPD, by ethical and environmental claim, 2017-19
- Environmental claims gain ground
- Universal ethicality
- Bar shampoos are gaining traction in Germany
- Suitable haircare
 - Graph 26: 'suitable for' hair product NPD, by 'suitable for' claim, 2017-19
- Call it out
- New male brand stripped down to the necessities
- Growing potential for ethnic positioning
- L'Oréal looks set to launch Carol's Daughter in Germany
- Pantene targets white and greying hair of all ages
- CBD has potential to become the miracle ingredient for mature hair
- Opportunities in scalp products
- Blending healthcare with haircare
- Henkel leads NPD in 2018...
 - Graph 27: NPD in hair products, by ultimate company**, 2017-19
- ...with Henkel revamps in Germany including more basic positioning, vegan formulas and eco-friendly messaging

MARKET SHARE

Retail market share of shampoo & conditioners, 2017-18

- Big players lead market share in haircare
- Category growth driven by L'Oréal and own labels
- New specialised brands will increase the pressure on top players in future

Retail market share of hair styling agents, 2017-18

- Henkel leads the styling category, yet losing to L'Oréal and own labels
- Sluggish performance by Henkel whilst L'Oréal continues to steam ahead
- Own label gains market share

MARKET SEGMENTATION, SIZE AND FORECAST

- Innovative formats and emerging brands to drive long-term growth

- Steady growth predicted for German haircare market

Retail value market shares of shampoo & conditioners, by segment, 2017-18

- Growth driven by convenient and specialised haircare products
- German shampoo and conditioner category seeing healthy growth

Retail value market shares of hair styling agents, by segment, 2017-18

- Sprays continues to demonstrate stellar growth
- Styling category boosted by strong growth from spray and mousse formats

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, 2014-24

- Market size and forecast – value

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

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

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