

HAND, BODY AND FOOTCARE – GERMANY – 2020

Increased hand washing and sanitising has driven the need for skin protection in 2020. High usage of bodycare in Germany will bolster the category amidst recession.



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Report Content

EXECUTIVE SUMMARY

- Mintel's perspective

Market context

- Impact of COVID-19 on hand, body and footcare
- Germany has a strong market for bodycare
- Consumers look for calm amidst COVID-19

Mintel predicts

- Expected boost in handcare to maintain market growth
- Category to experience sluggish growth long-term

What consumers want and why

- Consumers want: to try innovative formats
 - Graph 1: agreement with statement, "Haven't used but interested in using", by format type, April 2020
- Consumers want: expert-led formulas
- Consumers want: expert-led formulas
- Consumers want: issue-based care
 - Graph 2: hand, body and footcare behaviours, April 2020
- Consumers don't want: to sacrifice naturalness for sustainability
 - Graph 3: interest in product qualities, April 2020

Opportunities

- Harmonise NPD with skin function
- Sell hand, body and footcare in sets
- Create scent escapes for wellbeing
- Tap into the skinfluencer trend on TikTok

The competitive landscape

- Leading brands stay on top in 2019
- Quick Download Resources

THE IMPACT OF COVID-19

- COVID-19's impact on the broader category in Germany
- German market for hand, body and footcare to grow in 2020
- Key shifts in consumer behaviours

- Graph 4: change in intent to spend about the same on beauty and personal care, March–August 2020

- How COVID-19 is impacting key consumer segments
- How COVID-19 is impacting key consumer segments
- Promote skin health to drive engagement
- Economy to rebound quickly in 2021
- Be creative with your care offering
- Be creative with your care offering
- Promote specialised handcare alongside hand washing
- Encourage use of alternative instant repair formats
- Consumers want cause-driven brands
- The impact of COVID-19 on the marketing mix
- The impact of COVID-19 on the marketing mix
- VAT reduction takes the edge off
- VAT reduction takes the edge off
- How a COVID-19 recession will reshape the industry
- A COVID-19 recession will reshape the industry outlook
- A COVID-19 recession will reshape the industry outlook

MARKET DRIVERS

- Positive economic growth will resume in 2021
 - Graph 5: real GDP growth, 2008–20 (est)
- Spend on BPC is mostly resilient during COVID-19 outbreak
- Spend on BPC is mostly resilient during COVID-19 outbreak
- Germany has a large market for bodycare
- Drugstores reign supreme in Germany
- Stress/anxiety is at an all-time high...
- Stress/anxiety is at an all-time high...
- ...and mindful shoppers consume less

WHAT CONSUMERS WANT, AND WHY

Format usage in hand, body and footcare

- Lotion usage is exceptionally high in Germany
 - Graph 6: format usage by body part, April 2020
- German consumers want a soft skin feel
- Emollient usage will grow
 - Graph 7: format usage for hands and feet, April 2020

Hand, Body and Footcare – Germany – 2020

- Consumers overlook their feet
 - Graph 8: format usage by gender, April 2020 – NET
- Target younger audiences in footcare

Interest in innovative hand, body and footcare formats

- Opportunity for innovative formats is big
 - Graph 9: usage of and interest in formats by type, April 2020
- Build innovative formats into established routines
 - Graph 10: agreement with statement "Haven't used but interested in using", by format type, April 2020
- Borrow formats from facial skincare
- Rinse-off conditioners are tricky
- Leverage masks in home spa trend
- Leverage masks in home spa trend

Hand, body and foot skin concerns

- Cracked and irritated skin are top concerns
 - Graph 11: skin issues experienced on hands and feet, April 2020
- Prevalence of skin irritation on hands will grow
 - Graph 12: skin issues experienced on hands, April 2020
- Women suffer from cracked feet
 - Graph 13: skin issues experienced on feet, by gender, April 2020
- Consumers juggle variety of skin issues on the body
 - Graph 14: skin issues experienced on upper and lower body, April 2020
- Address cellulite holistically
- Address cellulite holistically

Skincare behaviours in hand, body and footcare

- Multi-function does not mean all-purpose
 - Graph 15: behaviours regarding hand, body and footcare, April 2020
- Mintel Trend Driver: Value
- Bad timing for interest in premium
- Bad timing for interest in premium
- Use scent escapes to encourage trial
- Pharmacy brands appeal to men
- Pharmacy brands appeal to men

Interest areas for hand, body and footcare products

- Natural ingredients are German standard
- Natural ingredients are German standard
- Natural ingredients are German standard

- Graph 16: interest in hand, body and footcare product qualities, April 2020
- Target gentle formulations for the over-55s
- Mintel Trend: Prove it
- Sustainability expectations have accelerated

LAUNCH ACTIVITY AND INNOVATION

- NPD in new innovation slows down
 - Graph 17: NPD in hand, body and footcare, by launch type, 2015-20
- Handcare NPD to shake up body-driven market
 - Graph 18: NPD in hand, body and footcare, by segment, 2015-20
- Focus on handcare will place pressure on long-lasting claims
- Fewer own label product launches in 2019
 - Graph 19: NPD in hand, body and footcare, by own label versus branded, 2015-20
- Private label extends ranges with new formats
- Leading companies expand their ranges
 - Graph 20: NPD in hand, body and footcare, by top ten ultimate companies in 2019, 2018-20
- Leading companies innovate in men's care
- Support men in developing a habit
- Beiersdorf strives to be inclusive
- Natural claims saturate the category
- Natural claims saturate the category
- Vegan claims trend in bodycare
 - Graph 21: fastest growing and fastest declining bodycare claims in 2019, 2018-19
- Sustainability claims create buzz in handcare
 - Graph 22: fastest-growing and fastest-declining handcare claims in 2019, 2018-19
- Convenience claims refresh footcare occasions
 - Graph 23: fastest-growing and fastest-declining footcare claims in 2019, 2018-19
- Creating a daily habit for footcare

Advertising and marketing activity

- Vaay: this is the good stuff
- Mit Ecken und Kanten: the imperfect shop
- i+m Naturkosmetik: Highlighting locality
- Neutrogena: Hygge edition
- Community feedback

MARKET SHARE

Retail market share of hand, body and footcare, 2018-19

- Companies held their share in 2019
- Henkel acquires HelloBody
- Private label remains competitive

MARKET SEGMENTATION, SIZE AND FORECAST

Forecasting during COVID-19 crisis

- Note on forecast in response to COVID-19
- Note on forecast in response to COVID-19

Market size and forecast – retail value sales

- Expected boost in handcare to keep market growing
- Category to experience sluggish growth long-term

Retail value market shares of hand, body and footcare by Segment, 2018-19

- Footcare segment sees strongest growth in 2019
- Bodycare will remain strong in 2020
- Footcare sees +9% value growth in 2019
- Handcare will grow its share in 2020

APPENDIX

Note on COVID-19

- COVID-19's impact on hand, body and footcare and German consumer behavior

Appendix – products covered, abbreviations and consumer research methodology

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

Appendix – market size and forecast – retail value sales

- Market size and forecast – value

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