

# HOUSEHOLD CLEANING EQUIPMENT – GERMANY – 2022

The needs-driven usage of cleaning equipment provides some immunity against inflation; hence brands can focus on sustainable traits including reusability to resonate with consumer preferences.



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# Household Cleaning Equipment - Germany - 2022

## This report looks at the following areas:

- The short-, medium- and long-term impact of COVID-19 and inflation on household cleaning equipment
- Usage of household cleaning equipment, including floor cleaning equipment
- Purchasing responsibilities and important purchase factors for household cleaning equipment shoppers
- Household and floor cleaning equipment behaviour
- Attitudes towards household cleaning equipment including availability and pricing of sustainable and smart cleaning equipment
- Launch activity and innovation opportunities for household cleaning equipment brands
- Market size and shares for household cleaning equipment brands, including a future outlook of the market development



The needs-driven usage of cleaning equipment provides some immunity against inflation; hence brands can focus on sustainable traits including reusability to resonate with consumer preferences.

## Overview

The **household cleaning equipment market will be largely protected from the impact of inflation** given the necessity of purchase and affordability of the lower end of the market. In 2021, branded products gained market share, but financially worried consumers are likely to shift back to private label products.

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The higher end of the market faces the biggest threat as **premium electrical cleaning equipment will compete with discretionary spending priorities** in favour of travel or dining experiences. Financial uncertainties stemming from the conflict in Ukraine are aggravating the situation and are likely **to induce a delay of major purchases**.

**Brands can still generate growth with more sustainable products.** 48% of German consumers want more sustainable cleaning equipment and 39% find it acceptable to pay more for it. Currently, only 63% of NPD in cleaning equipment show at least one ethical & eco-friendly claim, with other household categories way ahead.

Surprisingly, 57% of consumers neither agree nor disagree that sustainable cleaning equipment is less hard wearing than regular products. Despite demand for sustainable products and the willingness to pay a premium, Germans seem to have little experience with them. **Increased NPD and marketing activity could overcome low availability or visibility of eco-friendly cleaning equipment.**

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# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview
- The five-year outlook for household cleaning equipment

### Market context

- The impact of the economy on the household cleaning equipment category
- Demographic changes are reshaping family structures
- Sustainability concerns on the rise

### Mintel predicts

- Market size & forecast
- Despite expected value correction, potential to generate growth remains
- Stable long-term outlook for household cleaning equipment

### Opportunities

- Cater for the demand of more eco-friendly cleaning equipment
- Go beyond convenience and invest in cleaning efficacy to uphold robot vacuum cleaners' growth
- Kickstart automation in cleaning equipment by facilitating installation support

### The competitive landscape

- Clear trend towards branded household cleaning equipment
- Quick download resources

## MARKET DRIVERS

### COVID-19 and the German economy

- 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
- The impact of the economy on consumer's financial confidence
  - Graph 2: change in financial situation since the start of the COVID-19 outbreak, 2020-22
- The impact of the economy on the household cleaning equipment category

### Demographic change

- Embrace rising share of one-person households with multi-functional cleaning equipment

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- Graph 3: households and projected households, by type of household, 2000-40
- Expansion of living space to drive needs of product performance
  - Graph 4: average living space per flat and per capita, 2000-20

## Sustainability

- Promote waste reduction with reusable cleaning equipment
- Right to repair to redefine life cycle of small electronic household appliances
- Room to reopen the debate on energy efficiency labels for vacuum cleaners
  - Graph 5: value market shares of vacuum cleaners, by energy efficiency, 2015-19

## Smart home technology

- Post-pandemic lifestyles to spark new interest in home cleaning automation

## WHAT CONSUMERS WANT AND WHY

### Purchasing responsibilities

- Attract male shoppers to equalise purchasing responsibilities
  - Graph 6: purchasing responsibilities for household cleaning equipment, by gender, 2021
- Gamify the household cleaning equipment shopping experience
  - Graph 7: any purchasing responsibilities for household cleaning equipment, by gender and age - NET, 2021

### Usage of cleaning equipment

- Prominent usage of cleaning equipment calling for more innovation
- Cleaning equipment suitable for dishwashing leading the ranking in usage
  - Graph 8: usage of household cleaning equipment - NET, 2021
- Address varied kitchen cleaning needs with multipurpose products
- Kitchen and bathrooms presenting most varied need for cleaning equipment
  - Graph 9: usage of household cleaning equipment, by room, 2021
- Close the market gap for bathroom cleaning equipment
  - Graph 10: usage of household cleaning equipment in the bathroom, 2021
- Help young consumers align eco-concerns with purchase decisions
- Diverging usage patterns in living spaces favouring dusters and cloths
  - Graph 11: usage of main household cleaning equipment, by bedroom and living room, 2021
- Target diverse needs of fathers through online channels
  - Graph 12: repertoire of usage of household cleaning equipment, by parental status, 2021

### Important purchase factors

- Reusable cleaning equipment high in demand
  - Graph 13: important purchase factors for household cleaning equipment, 2021
- Leverage sustainable attributes in washable cleaning equipment

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- Optimise composition of sustainable cleaning equipment for enhanced durability
- Examples of NPD incorporating recycled materials
- Tap into ethical standards to generate added value
- Assume ethical and social responsibilities to resonate with German consumers

## Behaviours towards cleaning equipment

- Challenge substitute usage for cleaning equipment...
- ...by promoting hygienic attributes of natural and reusable cleaning equipment

## Usage of floor cleaning equipment

- Embrace the changing landscape of floor cleaning equipment
  - Graph 14: usage of floor cleaning equipment, 2021
- Promote the fun in manual floor cleaning to counteract cleaning fatigue
- Promote convenience of multi-functional floor cleaning equipment to older consumers
  - Graph 15: repertoire of usage of floor cleaning equipment, by age, 2021
- Tap into expansion opportunity for premium floor cleaning within affluent consumers
  - Graph 16: usage of robot vacuum cleaner and vacuum cleaners with integrated mop, by net monthly household income, 2021
- Improve navigation and cleaning performance to challenge robot cleaner critics

## Floor cleaning equipment behaviours

- Tap into disinfectant claims to satisfy demand for thorough floor cleaning
  - Graph 17: floor cleaning equipment behaviours, 2021
- Help Germans enhance floor cleaning routines with steam cleaners
- Turn vacuum cleaners into all-rounder household helpers
- Ease the burden of cleaning tasks for parents by facilitating installation processes

## Attitudes towards cleaning equipment

- Respond to consumer demand and expand offering of cleaning equipment
  - Graph 18: attitudes towards household cleaning equipment, 2021
- Close the market gap for sustainable premium cleaning equipment
- Raise awareness about climate change to challenge skeptical consumers' attitudes

## LAUNCH ACTIVITY AND INNOVATION

- Expand on NPD for household cleaning equipment to meet sustainability demands
  - Graph 19: NPD in household care, by category, 2017-21
- Celebrate minimal, eco-friendly packaging
  - Graph 20: NPD in household cleaning equipment, by launch type, 2019-21
- Examples of new packaging launches stressing product efficiency

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- Examples of new product launches in household cleaning equipment
- Help household cleaning equipment catch up on ethical & environmental product claims
  - Graph 21: NPD in household cleaning equipment, by top ten leading claims, 2019-21
- Examples of NPD reshaping dishwashing equipment
- Ensure product longevity to uphold private label customers
- Examples of private label product launches
- Freudenberg taking the lead in NPD in 2021
  - Graph 22: NPD in household cleaning equipment, by leading companies, 2019-21
- Push industry standards to get ahead of competition through market fragmentation
- Examples of branded product launches

## Advertising and marketing activity

- Vileda's floor cleaning equipment promoted as stars
- Vileda's Steam Plus for antibacterial yet easy floor cleaning
- Spontex promoting their gloves' protective function
- iRobot Roomba promotes personalised, effortless cleaning

## MARKET SHARE

- Clear trend towards branded household cleaning equipment
  - Graph 23: value market shares for household cleaning equipment, 2020-21
- Vileda consolidating its market leader position
- Reassure financially concerned consumers through private label offering

## MARKET SIZE, SEGMENTATION AND FORECAST

### Household cleaning equipment

- Price increases sustained market value for cleaning equipment in 2021
- Floor cleaning tools and dusters sustained growth within declining household cleaning equipment market
- COVID-19 boost for cleaning equipment starting to wear off
- Stable long-term outlook for household cleaning equipment
- Short-term decline
- Mid-term decline
- Long-term stabilisation

### Electrical floor cleaning equipment

- Significant growth in vacuum cleaners centred around convenience

## APPENDIX

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

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- CHAID analysis methodology
- CHAID analysis – "Do you agree or disagree with the following statements?"
- CHAID analysis – "Do the following statements about cleaning the home apply to you?"
- 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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