

MEN'S HAIRCARE & SKINCARE – GERMANY – 2022

Post-COVID-19 decline is affecting both categories, but personalisation and greater inclusivity can drive sales. A significant share of power users shows promise.



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Men's Haircare & Skincare - Germany - 2022

This report looks at the following areas:

- The impact of COVID-19 and rising inflation on men's haircare and skincare
- Usage and purchase of haircare and skincare in the last 12 months, which has been largely flat
- Buying behaviours and purchase channels where offline still trumps online
- Barriers to purchase, lack of time being the main culprit, and purchase factors, of which advertising and reviews are the most influential
- Interest in innovation in men's haircare and skincare – above all, personalisation
- Attitudes towards men's haircare and skincare, which are coloured by a need for greater representation
- Launch activity and innovation



Post-COVID-19 decline is affecting both categories, but personalisation and greater inclusivity can drive sales. A significant share of power users shows promise.

Overview

Men are often seen as not very engaged in haircare, and skincare in particular. However, 29% of facial skincare users, and 33% of haircare users, have more than four products in their repertoires. To cater to these '**power users**', brands can offer complementary ranges and emphasise how products can work together to **maximise the impact of men's grooming routines**.

Rising inflation and ubiquitous price hikes will see more German **men pursue savvy shopping behaviours**; already, 43% intend to buy more own-label products, while 41% plan to reduce

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non-essential purchases. As a result, **sustainability is at risk of being pushed down the list of consumer priorities**.

Stagnating product usage, partially fuelled by rising costs, and the pursuit of one-stop shopping, are some of the biggest threats to value growth in both categories. At the same time, **supermarkets may benefit** and turn into veritable competition for drugstores.

Men's **widespread interest in personalisation** presents a prime opportunity for both haircare and skincare. Hyper-personalisation and expert advice can have appeal in the premium segment. On the mass-market side, app-based education and product recommendations can be a purchase driver for brands and retailers.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five-year outlook for men's haircare & skincare

Market context

- Conflict in Ukraine gives rise to financial worries
- Inflationary pressures add up
- Men demand inclusivity across the board

Mintel predicts

- Falling sales and loss of value
- Market size & forecast
- Languishing growth expected until 2027

Opportunities

- Engage 'power users'...
- ...while serving minimalists
- Offer personalisation at every price point
- Dare to reimagine masculinity
- Quick download resources

MARKET DRIVERS

The German economy

- Strong post-COVID-19 bounceback followed by a period of slower growth
 - Graph 1: key economic data, in real terms, 2019-23
- Inflation is the key concern in 2022 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure
- Conflict in Ukraine affects BPC
- Sustainability faces challenges
- Some consumer groups will be more impacted than others
- Inclusivity efforts are essential

WHAT CONSUMERS WANT AND WHY

Usage of facial skincare products

- Overall use is stagnating...
 - Graph 2: usage of men's facial skincare products, 2021-22
- ...but there are notable changes in frequency
 - Graph 3: frequency of using men's facial skincare products, by product users, 2022
- Men are waking up to the benefits of moisture and skin treatments
- Minimalists and power users create marketing opportunities

Usage of haircare products

- Overall usage of haircare products mostly unchanged
 - Graph 4: usage of men's haircare products, 2021-22
- Styling products see more increase in frequent usage than shampoo
 - Graph 5: frequency of using men's haircare products, by product users, 2022
- Young men are treating and styling up a storm
- Product repertoires resemble those in facial skincare

Buyers of facial skincare/haircare products

- Three quarters of men buy their own products
 - Graph 6: purchase patterns in men's facial skincare/haircare, 2022
- Market to women who shop for men

Purchase channels

- Online shopping hasn't increased...
- ...but frequent online shoppers are more likely to be men
 - Graph 7: online purchase frequency of BPC products, by gender, 2021
- Male frequent buyers prefer a multichannel approach
 - Graph 8: comparison of male and female frequent shoppers, 2021
- Fathers and the financially comfortable are the most ardent online shoppers

Barriers to purchase

- Time is of the essence for a third of German men
 - Graph 9: barriers to purchase in men's facial skincare/haircare, 2022
- Target men in their prime spending years with subscriptions
 - Graph 10: men who signed up for a beauty/grooming subscription service since the start of COVID-19, 2021
- Use apps to educate

Purchase factors

- Male buyers are swayed by ads, other people's opinions
 - Graph 11: purchase factors in men's facial skincare/haircare, 2022
- Ensure advertising is relatable
- Enhance reliability of reviews
- Provide expert advice to encourage purchases
- Improve credibility of eco/ethical claims

Interest in innovation: men's facial skincare

- Almost a third of men are interested in personalisation
 - Graph 12: interest in innovation in men's facial skincare, 2022
- Personalisation is key in skincare
- Formel Skin zones in on skin conditions
- Innovate with active ingredients
- Pile on the benefits
- Reassure men that it's OK to indulge

Attitudes to men's facial skincare

- Ingredients and inclusivity are hot topics
 - Graph 13: attitudes towards men's facial skincare, 2022
- Celebrity skincare brands can collaborate with experts
- Educate about ingredients
- In advertising, focus on men's needs
- Tackle under-representation in skincare

Interest in innovation: men's haircare

- Personalisation is big in haircare, too
 - Graph 14: interest in innovation in men's haircare, 2022
- Tap into interest in personalisation
- Draw on trending skincare ingredients
- Innovate with relaxing haircare products
- Emphasise the importance of SPF for the scalp

Attitudes to men's haircare

- Scalp health and hair loss are front of mind
 - Graph 15: attitudes towards men's haircare, 2022
- Support scalp health
- Combat stigma around hair loss

LAUNCH ACTIVITY AND INNOVATION

- Competition is heating up behind L'Oréal and dm
 - Graph 16: pre- vs post-pandemic launches in men's haircare and skincare, by top ten companies, 2017-22
- Beiersdorf recycles CO2
- Relief for sensitive skin – at every price point
- Brands combine face and beard care
- K-Beauty for Men
- Brands ramp up eco/ethical launches post-COVID
 - Graph 17: pre- vs post-pandemic launches in men's haircare and skincare, by top ten claims, 2017-22
- The unstoppable rise of eco/ethical claims
- Rossmann goes carbon-neutral
- Focus on biodegradability
- Anti-hair loss meets botanical

Advertising and marketing activity

- Alpecin advocates for hanging on to what you have
- NIVEA MEN spotlights sensitive skin
- MENMALIST draws the line at ten ingredients
- Zalando Beauty shows different images of masculinity

MARKET SIZE, SEGMENTATION AND FORECAST

- New buying behaviours and rising costs will chip away at men's repertoires
- Men's haircare and skincare will see very modest growth
- Most segments have taken a nosedive
- Market segmentation – value

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

Men's Haircare & Skincare – Germany – 2022

- Market size – value
- Market forecast and prediction intervals – value

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