

SOAP, BATH AND SHOWER – GERMANY – 2020

COVID-19 has put consumers' focus firmly on hygiene, but there is room to promote products for self-care, relaxation and overcoming stress.



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Report Content

EXECUTIVE SUMMARY

- Mintel's perspective

Market context

- Soap, bath and shower sales have been set to soar in 2020
- Good hygiene habits will be firmly established
- Price leads, but environmental concern is heightening
- Lockdown provides a boost to online retail

Mintel predicts

- The pandemic will boost Germany's soap, bath and shower market
- Sales get a major boost in 2020

What consumers want and why

- Consumers want to conserve water...
- ...and more of the planet's resources
- Consumers want mood-boosting and long-lasting scents
- Consumers want to protect skin integrity
- Consumers want 'clean', natural germ killers

Opportunities

- Refillable sanitisers promote on-the-go use
- Bring designer flair to sanitiser packaging
- Optimise handwashing with packaging
- 'Feste Dusche' rejuvenates bar soaps
- Use scent and skincare benefits to premiumise
- Go beyond 2-in-1 to target German men

The competitive landscape

- Private label takes one euro in five
- Brands account for the highest sales share
 - Graph 1: top five companies for retail value share of soap, bath and shower products, 2019
- Quick download resources

THE IMPACT OF COVID-19

- COVID-19's impact on the broader category in Germany

Soap, Bath and Shower – Germany – 2020

- Market size and forecast following the COVID-19 outbreak
- Key shifts in consumer behaviours: personal hygiene is a priority
 - Graph 2: compared to your usual spend, do you intend to spend more, less or about the same on the following categories, 3 March-22 July 2020
- How COVID-19 is impacting key consumer segments
- Acknowledging threats...
- ...and focusing on opportunities
- Personal and home hygiene take priority
 - Graph 3: reasons for making those changes to personal hygiene routine, May 2020
 - Graph 4: changes to personal hygiene routines since the COVID-19 outbreak, May 2020
- Maintain safety messaging around handwashing
- Tap the growing trend for immunity support
- Communicate the science of hand hygiene
- Opportunities for branded public sanitiser stations
 - Graph 5: consumers who intend to bring soap or hand sanitiser on the go after the outbreak is over, by gender and age, May 2020
- Make on-the-go products more attractive
- Design handbag accessories for sanitisers
- Add wellness benefits to promote self-care
- Consumers reward brands that do good
- The impact of COVID-19 on the marketing mix
- How a COVID-19 recession will reshape the industry

MARKET DRIVERS

- Positive economic growth forecast to resume in 2021
 - Graph 6: real GDP growth, 2008-20 (est)
- Consumers maintain their BPC spending during COVID-19 outbreak
- Ethical considerations see consumers cut back
- The Digital Generation leads the conversation on the environment
 - Graph 7: consumer concern about climate change, by generation, October 2019
- Encourage consumers to save water
- Brands encourage consumers to save water
- The growth of online shopping

WHAT CONSUMERS WANT AND WHY

Use of soap, bath and shower products

- Liquid hand soap enjoys the highest usage

Soap, Bath and Shower – Germany – 2020

- Graph 8: use of soap, bath and shower products in the last six months, May 2020
- Hand sanitiser saw rising use before COVID-19
 - Graph 9: change in use of soap, bath and shower products in the last six months, January 2017-May 2020
- Expand men's products beyond 2-in-1 options
- Solid cleansers have room to succeed based on their eco-credentials
- Make more stylish hand sanitisers for on-the-go use

Purchase drivers for soap, bath and shower products

- Fragrance is the primary purchase driver
 - Graph 10: purchase drivers for soap, bath and shower products, May 2020
- Top purchase drivers
- Use scent to add value to the category
- Premiumise with longer-lasting scent
- Nurture older women with skincare benefits
- Microbiome care has yet to reach soap, bath and shower
- Look to the Nordics for sensitive skin and 0% (free-from) products
- Everyday low prices are preferred to special offers
- Private labels offer current trends at low prices
- Environmental concerns are an important secondary driver
- Use automation for improved hygiene
- Functional packaging for ease of use

Behaviours towards soap, bath and shower products

- Consumers look to make changes that benefit the environment
 - Graph 11: select behaviours towards soap, bath and shower products, May 2020
- Consumers are cutting back on product use
 - Graph 12: consumers who have reduced the number of products used in the last six months or are interested in doing so, by select demographics, May 2020
- Using refills can reduce packaging waste
- NIVEA trials refill stations in DM stores
- Ultra concentrated products save resources
- Packaging-related changes can benefit the environment
 - Graph 13: packaging-related behaviours towards soap, bath and shower products, May 2020
- Help reduce food waste...
- ...to avoid depleting natural ingredients
- Appeal to eco-aware younger shoppers with ethical ingredient claims
 - Graph 14: changes made to product use by ingredient, by gender and age, May 2020

Attitudes towards soap, bath and shower products

- Hygiene takes priority, but mood-enhancing benefits are also in demand
 - Graph 15: attitudes towards soap, bath and shower products, May 2020
- Younger consumers look for wellbeing benefits
 - Graph 16: agreement that bathing/showering helps emotional/physical wellbeing, by select gender and age, May 2020
- Promote bathing and showering rituals as a time for mindfulness
- Promote the home spa/sauna experience
- Three in 10 believe there's little difference between brands
 - Graph 17: brand-related attitudes towards soap, bath and shower products, by gender and age, May 2020
- Younger users drive demand for 'clean' and natural formulas
 - Graph 18: agreement with select attitudes towards ingredients and formulas, by gender and age, May 2020
- Scope for natural antibacterials in hygiene products

LAUNCH ACTIVITY AND INNOVATION

- Bath additives lose share of NPD
 - Graph 19: soap, bath and shower NPD, by segment, 2015 and 2019

Sanitisers and hand soaps

- Hand sanitisers should seize this opportunity
- Huge increase in on-the-go hand sanitiser options
- Reassure parents with natural antibacterials
- Reassuring 'immunity' and 'natural' products for families
- Use colour-change technology for visible proof

Plant-based and sustainable

- Vegan claims are a big driving force for NPD
 - Graph 20: leading claims for NPD in soap, bath and shower products, 2015 and 2019
- Make plant-based a key priority
- 'Clean label' addresses ingredient concerns
- Position shower bars as the eco-friendly alternative
- Scope to use 'zero' sustainability claims on pack

Sensorial benefits

- Go beyond moisturising to care for the microbiome
- Added moisturising benefits are key to attract older women
- Use scents to improve mood and enhance the bath or shower experience
 - Graph 21: soap, bath and shower NPD by leading fragrance component groups, 2015 and 2019

Soap, Bath and Shower – Germany – 2020

- Mood-enhancing scent names and messaging take centre stage
- Significant opportunities to target men
- Bring international launches to Germany

Advertising and marketing activity

- Lockdown theme of solidarity
- German brands respond in unison during lockdown
- Unilever brings The Right to Shower to Germany
- Wake up, take a shower and be there – let's tackle it together
- Shift the 'togetherness' message towards inclusion
- Olivia Jones calls for more togetherness
- Douglas: My Beauty My Pride
- Stand up for diversity
- Soap brands as health ambassadors

MARKET SHARE

- Appeal to consumers with eco-credentials
- Private label takes a little over a fifth of sales
- Market shares hold steady year-on-year

MARKET SEGMENTATION, SIZE AND FORECAST

Forecasting during the COVID-19 crisis

- A note on forecast in response to COVID-19

Market size and forecast – retail value sales

- Changed hygiene behaviours benefit sales in Germany
- Sales get a major boost in 2020
- Changed hygiene behaviours give a short-term boost to sales
- Mid-term will see modest annual declines
- Long-term growth to benefit from interest in wellbeing

Market segmentation

- Shower gel is the biggest sector
- 2019 sees a downturn for all categories except liquid soap

APPENDIX

A note on COVID-19

- COVID-19's impact on soap, bath and shower products and German consumer behaviour

Appendix – products covered

- Products covered in this Report

Appendix – abbreviations

- Abbreviations

Appendix – consumer research methodology

- Consumer research methodology

Appendix – market size and forecast

- Market size and forecast – value

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