

# SOAP, BATH & SHOWER – GERMANY – 2023

Usage of SBS products has returned to pre-pandemic levels. Brands can encourage uptake by focusing on relaxation, locally-sourced ingredients and skin health.



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# Soap, Bath & Shower - Germany - 2023

## This report looks at the following areas:

- The short-, medium- and long-term impact of inflation on SBS products including changing usage habits and buying intentions
- Usage of SBS products in the last six months, with a decline in handwashing products
- Interest in innovation in SBS products, with a focus on locally produced ingredients and protection of the skin barrier/microbiome
- Typical amount spent on a single SBS product, with the majority spending under €5
- Factors when choosing a SBS product, with fragrance, low price and natural ingredients coming out on top
- Behaviours around SBS products, with a focus on skin health, relaxation and money saving
- Launch activity and innovation with focus on shower products



Usage of SBS products has returned to pre-pandemic levels. Brands can encourage uptake by focusing on relaxation, locally-sourced ingredients and skin health.

## Overview

After a big spike in sales in 2020 due to an increased focus on personal hygiene during COVID-19, the market declined in 2021 and again in 2022. Sales are expected to continue to level out up until 2028. Ongoing inflation and increased costs are driving up prices but market growth is cancelled out by a return to pre-pandemic usage of handwashing products.

Good value for money and efficacy are important to SBS users/buyers, but scent plays just as important a role as price as a purchase driver, even in times of financial difficulties.

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Consumers care especially about locally sourced ingredients (34% of users). However, brands need to find the balance between scaling local production whilst retaining credibility. Interest in products that strengthen the skin barrier/microbiome is high, showing how the skinification trend has reached SBS.

Relaxation is a major perk of showering and bathing given that 82% of SBS users think baths are a good way to relax. This provides opportunities to offer stress relief, especially for stressed Gen Zs.

The interest in transformative textures of SBS products is low (13% of users), but brands can reposition certain textures as eco-friendly options. Fully waterless products (like powders) especially can play an important part in a world that is increasingly struggling with water supply.

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# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview
- The five year outlook for soap, bath and shower

### Market context

- The cost-of-living crisis has consumers looking for affordable options...
- ...making it hard to encourage trading up

### Mintel predicts

- Market size & forecast
- Mintel predicts little to no growth
- The SBS market will see little to no growth up until 2028

### Opportunities

- Stress the advantages of multifunctional products
- Hop on the skinification trend
- Focus SBS care on women's intimate hygiene
- Take advantage of hybrid working for new SBS occasions
- Get ahead of Green Claims Directive and secure consumers' trust
- Climate change calls for sustainable formats

### The competitive landscape

- The SBS landscape is led by key players
- Private labels represent the largest share
  - Graph 1: company shares of SBS products, by value, 2022

## MARKET DRIVERS

### The German economy

- The German economy slips into a technical recession
  - Graph 2: key economic data, in real terms, 2019-24
- Inflation remains the key concern in 2023 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure
- The impact of the economy on SBS

## Social and environmental factors

- Working from home is here to stay
- Diversity and inclusion need more attention
- Influence of energy-saving measures on SBS usage
- Climate change will spur calls for more waterless products

## WHAT CONSUMERS WANT AND WHY

### Usage of soap, bath and shower products

- Shower products see the most usage
  - Graph 3: usage of body washing products, 2020 vs 2023
- Handwashing products experience a decline
  - Graph 4: hand washing products and soap usage, 2020 vs 2023
- Bar soaps have lost appeal
- Back to basics with curd soap
- Appeal to men with solid cleansing products
- Women tend to have bigger SBS repertoires
  - Graph 5: repertoire of soap, bath and shower products used, by gender, 2023
- Promote mid-day showers for flexible workers
- Translate the convenience of 2-in-1 products to the shopping experience
- In-shower treatment has seen significant growth

### Interest in innovation in soap, bath and shower products

- Germans are interested in local production
  - Graph 6: interest in innovation in soap, bath or shower products, 2023
- Localism gains popularity
- Support skin barrier with SBS products
- Medical benefits of SBS products appeal to Germans
- Combine skin health and localism to appeal to more than half of consumers
- Utilise traditional medicine in SBS products for the added-wellness factor
- Sleep-enhancing properties are relevant for younger Millennials
  - Graph 7: interest in SBS products that are designed to be used before bed, by generation, 2023
- Help Gen Z to relax
- Focus on the waterless benefits of transformative textures
- Take inspiration from skin- and haircare for personalisation

### Amount spent on soap, bath and shower products

- Consumers spend little money on SBS

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- Graph 8: amount typically spent on a single soap, bath or shower product, 2023
- Convince men of private-label products
  - Graph 9: purchasing of private-label vs branded products for bath or shower products, by gender, 2023
- Germans are used to more affordable products compared to other European countries

### Factors when choosing a soap, bath or shower product

- Fragrance remains a top factor despite the cost-of-living crisis
  - Graph 10: factors when choosing a soap, bath or shower product
- Low price has become more important
- Interest in fragrance shows the importance of sensorial experience
- Use the skinification trend in SBS
- Entice men to use more SBS products with natural ingredients
- Be precise with sustainability messaging and steer away from greenwashing
- Vegan claims are seen as the norm rather than an expectation

### Attitudes and behaviours around SBS products

- Behaviours are centred around skin health and relaxation
  - Graph 11: behaviours towards soap, bath or shower products, 2023
- Relaxation is key
- Provide tools for a luxurious shower experience
- Follow the skin health trend
- Consumers care about beauty-enhancing properties of SBS
- Position SBS routines as part of bodycare routines in the summer/winter
- Offer menstruation and incontinence relief
- Understanding of recycling is high
- Consumers' cost-of-living crisis behaviours
  - Graph 12: cost-of-living behaviours for SBS products, 2023
- Money and water savings are key
- Interest in refills is high but options are sparse
- Issues of recyclability in refill packs

## LAUNCH ACTIVITY AND INNOVATION

- Launch activity is strongest in shower products
  - Graph 13: SBS launches, by sub-category, 2018-23
- Drugstores reign supreme in launch activity
  - Graph 14: SBS launches by ultimate company, 2019-23
- Private-label brands show innovative strength
- dm gives powder formats a platform

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- Tout cost-saving benefits of multifunctional products
- Top claims in SBS feature primarily ethical claims
  - Graph 15: SBS launches with select eco-ethical and natural claims, 2020-23
- Powder-to-liquid products can be more sustainable
- Usage of packaging with aluminium has risen
- Use long-lasting scents
- International inspiration for microbiome care
- Include SBS in anti-ageing routines
- Put emphasis on menopause products
- Look to children's SBS products for textural inspiration
- Gourmet fragrances stage a comeback
  - Graph 16: SBS launches by top three fragrance component groups, 2019-23
- Take inspiration from herbal/flavoured teas
- Tea can serve as inspiration for bath additives
- Provide more accessible SBS products

### Advertising and marketing activity

- Lush x Lazy Oaf
- Irish Spring Nice-Smelling Gaming Shower
- Axe collab with rapper Luciano pokes fun at flex culture

## MARKET SHARE

- The market is led by Unilever and Beiersdorf
- Fragmentation of SBS market

## MARKET SIZE, SEGMENTATION AND FORECAST

- The market will see stagnation
- Little to no growth predicted for the soap, bath and shower category

### Market segmentation

- Losses in most segments
- Only shower gel experienced an uptick

## APPENDIX

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

- Products covered in this Report
- Abbreviations

- Consumer research methodology
- CHAID Analysis
- CHAID – tree output
- A note on language

### **Appendix – market size and central forecast methodology**

- Forecast methodology
- Forecast methodology – fan chart
- Market size – value
- Market forecast and prediction intervals – value



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