

# SUNCARE – GERMANY – 2021

Reduced spend on suncare in 2020 proved the category is reliant on travel. Whilst demand will return as COVID-19's threat eases, NPD can future-proof the category.



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# Report Content

## EXECUTIVE SUMMARY

- Mintel's perspective

### Impact of COVID-19 on suncare

- COVID-19 subdues demand for suncare
- COVID-19's impact on suncare and German consumer behaviour

### Market context

- Economic disruption will drive interest in value propositions
- Shifts in travel behaviours will create a challenging environment

### Mintel predicts

- COVID-19's impact will be short and sharp
- Market size & forecast following COVID-19 outbreak

### What consumers want, and why

- Sun protection drives spend on suncare
- Consumers want: functional sun protection
  - Graph 1: reasons for using sun protection in the last 12 months, September 2020
- Consumers want: suncare usage prompts
- Consumers want: convenient formats for everyday use
- Consumers want: multifaceted protection
  - Graph 2: interest in select sun protection innovation, September 2020
- Consumers want: reasons to use sunless tanning

### Opportunities

- Tap into the consumer desire for total wellbeing
- Create a more inclusive suncare category

### The competitive landscape

- The leading players strengthened their position in 2020
  - Graph 3: retail market share of suncare value sales, by company, 2019

### Marketing mix

- The marketing mix for suncare in Germany
- Quick download resources

## MARKET DRIVERS

- A return to lockdown
- The impact of COVID-19 on the German economy
  - Graph 4: key economic data, in real terms, 2019-22
- Financial worries will drive cautious spending habits
  - Graph 5: changes in financial situation since the start of the outbreak, 2-12 February 2021
- Brexit will cause some disruption
- Demand continues to be driven by the weather
- Targeting older people could boost sales of suncare
  - Graph 6: total population by age, % share, 2020-30
- All natural remains an untapped opportunity
  - Graph 7: type of BPC products typically purchased, June 2020
- Position suncare as an essential part of facial skincare routines
- Tap into bodycare benefits to drive demand
  - Graph 8: reasons for using bodycare products, December 2020

## WHAT CONSUMERS WANT, AND WHY

### Impact of COVID-19 on consumer behaviour

- BPC spend has proven resilient despite disruption
  - Graph 9: spend on BPC compared to before the COVID-19 outbreak, 4-17 March 2021
- Retail disruption drives online growth
- Reduced holidaying impacts demand for suncare
  - Graph 10: expectations for main holiday 2021, 4-17 March 2021
- Eco-concerns have heightened during the pandemic

### Usage of sun protection and aftersun

- Traditional sun protection formats remain popular
  - Graph 11: sun protection and aftersun products used in the last 12 months, September 2020
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  - Graph 12: sun protection and aftersun products used in the last 12 months, by age, September 2020
- Create new usage occasions for aftersun
- Convenience and hygiene can boost format experimentation
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  - Graph 13: sun protection levels used in the last 12 months, September 2020

## Reasons for using and not using sun protection

- Skin health concerns drive usage of sun protection
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- Anti-ageing messages resonate with women
- Take claims beyond sun protection
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  - Graph 16: reasons for not using sun protection in the last 12 months, September 2020
- Rise in domestic tourism could subdue demand
- Use technology to help consumers avoid sunburn

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- Additional protective claims resonate
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- Expand skin protection claims to drive usage frequencies
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- Tap into wearables to prompt reapplication
- Address the diversity gap in sun protection
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## Usage of sunless tanning products and services

- Reposition sunless tanning to boost engagement
  - Graph 20: sunless tanning products and services used in the last 12 months, September 2020
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- Multistep skincare routines present opportunities
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- Promote year-round sun protection
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- Create new usage occasions for sun protection
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- Brands innovate to remain competitive
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- Performance claims lead in sun protection
  - Graph 32: top 10 claims in sun protection in 2020, 2018-20
- Sun protection strives for versatility
- Infrared claims are placed front and centre
- Ocean-friendly formulas will resonate with young consumers
- Mineral sun protection can protect from blue light
- A new standard for sensitive skin
- Reposition water-resistant products for sport
- Preventing hyperpigmentation is a prominent theme
- Invisible defense claims could improve inclusivity

### Aftersun

- Eco packaging gains ground in aftersun innovation
  - Graph 33: top 10 claims in aftersun in 2020, 2018-20
- Spotlight multifunctionality to assert value
- Create stronger ties between aftersun and self-care with scent
- Use alternative formats to maximise appeal
- Combine science and nature to respond to sustainability pressures

## Sunless tanning

- Vegan claims are now widespread in sunless tanning
  - Graph 34: top 10 claims in sunless tanning in 2020, 2018-20
- Speed and longevity will improve usage convenience
- Use gradual claims to ease consumers into sunless tanning
- Drop formats provide customisation opportunities
- Blur the line between sunless tanning and skincare

## Advertising and marketing activity

- La Roche-Posay: helping people find the right sun protection
- Ladival: highlighting its value proposition
- Jean&Len: tapping into the rise of staycations
- Avène: highlighting its Skin Protect, Ocean Respect initiative

## MARKET SHARE

### Retail market share of suncare, 2018-20

- Beiersdorf dominates in branded suncare
- Brand recognition and trust benefits the leading players
- Own-label could make gains in future

## MARKET SEGMENTATION, SIZE AND FORECAST

### Forecasting during the COVID-19 pandemic

- A note on the forecast in response to COVID-19

### Market size and forecast – retail value sales

- Suncare amongst the hardest hit BPC categories
- Suncare set to slowly recover after a difficult year in 2020
- Suncare market size and forecast

### Retail value market shares of suncare by segment, 2018-20

- Sun protection was outperforming prior to COVID-19
- Value growth was felt across the category in 2019
- Spend on self-tan boosted during the pandemic

## APPENDIX

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

- Products covered in this Report

- Consumer research methodology
- Abbreviations
- A note on language

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