

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

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

Marketing mix

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- Quick download resources

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 - Graph 5: changes in financial situation since the start of the outbreak, 2-12 February 2021
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 - Graph 6: total population by age, % share, 2020-30
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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
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Usage of sun protection and aftersun

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Usage of sunless tanning products and services

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- Brands innovate to remain competitive
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Sun protection

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- Infrared claims are placed front and centre
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- Mineral sun protection can protect from blue light
- A new standard for sensitive skin
- Reposition water-resistant products for sport
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- Invisible defense claims could improve inclusivity

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 - Graph 33: top 10 claims in aftersun in 2020, 2018-20
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- 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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