

# SUSTAINABILITY IN BPC – GERMANY – 2023

Consumers look to beauty/grooming companies to act sustainably. Sustainability should be aligned with cost savings, with refills continuing to play an important part.



Henrike Philipp, Research Analyst



# Sustainability In BPC - Germany - 2023

## This report looks at the following areas:

- The definition of sustainable practices by beauty/grooming brands, with consumers being concerned about the whole lifecycle of a product
- Sustainable routines, with most consumers undertaking one to two sustainable behaviours
- Research on how sustainable a beauty/grooming brand is, with a strong focus on recommendations
- Interest in refills, with most interest displayed in hand soap, bath or shower products and haircare
- Attitudes towards sustainability, with a focus on the cost-of-living crisis and confusion around the topic
- The four consumer typologies: responsibility shifters, disillusioned/paralysed, informed but impeded and deniers



Consumers look to beauty/grooming companies to act sustainably. Sustainability should be aligned with cost savings, with refills continuing to play an important part.

## Overview

German consumers can be divided into four consumer typologies, with the largest group of disillusioned/paralysed consumers (39%) feeling helpless in the face of sustainability. What's more, **44% of Germans** have not researched how sustainable a brand is in the last 12 months.

This underlines the attitude that **53% of Germans** have: **it's more important for big companies to act sustainably than for individuals to**. Brands should find a way to motivate these passive consumers to engage with sustainability, be it through financial incentives, raising hope or casting their view to the future.

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Initiatives like the EU Green Claims Directive will help alleviate confusion around greenwashing further, which concerns **62% of consumers**.

There is hope: Germans still display a **solid foundation of sustainable behaviours**, as **42% of consumers** undertake one to two sustainable actions, with **reducing water use coming out on top**. This is related to the ongoing cost-of-living crisis, as **64% of consumers** agree the cost-of-living crisis will lead to a prioritisation of cost over sustainability.

**Refills**, both for at-home use and at in-store locations, continue to possess **great opportunities** in the sustainable space and are seeing growth in all categories. However, usage barriers like high entry prices, availability and lack of convenience still need to be tackled.

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# Report Content

## EXECUTIVE SUMMARY

- The five year outlook for sustainability in BPC

### Market context

- Stagnation follows a technical recession
  - Graph 1: key economic data, in real terms, 2019-24
- Prove the value of sustainable products to consumers

### Mintel predicts

- Legislation keeps driving sustainability efforts
- Brands need to do the work but ensure they are not accused of greenwashing

### Opportunities

- Use learnings from SBS refills in other categories
- Fragrances show opportunities for refills at home and in store
  - Graph 2: launches in fragrances with refill claims, 2018-23
- Resolve the recyclability issues of refill pouches
- Use longer-lasting, multiuse and strong formulations to appeal to repertoire-reducing consumers
- The sustainability conversation has to start much earlier and should be pursued from conception to disposal after usage
  - Graph 3: definition of sustainable practices by beauty/grooming brands, 2023
- Encourage consumers through hopefulness

## MARKET DRIVERS

### The German economy

- Stagnation follows a technical recession
  - Graph 4: key economic data, in real terms, 2019-24
- Inflation slows down – but remains at a higher level
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and consumer expenditure
  - Graph 5: financial confidence index, 2022-23
- The impact of the economy on sustainability in BPC
- Prove value for money to appeal to cost-conscious consumers
- Tackle overconsumption and waste
- Get ahead of the Green Claims Directive
- Fight sustainability fatigue/passivity by going against greenwashing

- Ban on microplastic in cosmetics will have a big impact on the industry

### WHAT CONSUMERS WANT AND WHY

#### Definition of sustainable practices by beauty/grooming brands

- The whole product cycle is important to Germans
  - Graph 6: definition of sustainable practices by beauty/grooming brands, 2023
- Consumers prioritise sustainable packaging
- Sustainably sourced ingredients have appeal
- Use social media to educate consumers on sustainability
- Educate consumers on the meaning of certifications
- Focus on the reduction of emissions rather than offsetting
- Taking sustainability digital

#### Sustainable routines

- Sustainable routines happen at home
  - Graph 7: sustainable routines, 2023
- One to two sustainable behaviours are the norm
- Reducing water usage is front of mind for consumers
- Private label innovates in sustainable products
- Be aware of 'wishcycling' and educate consumers
- Position multiuse products as repertoire reduction
- Make refills in store as convenient as refills at home

#### Research on how sustainable a beauty/grooming brand is

- Research on sustainability happens in various ways
  - Graph 8: research conducted by consumers on how sustainable a beauty/grooming brand is, 2023
- Engage those consumers not researching with personal recommendations on sustainable brands
- Get men to use barcode apps
- Research on social media is mainly conducted by younger generations

#### Interest in refills

- Interest is highest in SBS refills
  - Graph 9: interest in refills, 2023
- Significant growth of refill launches in all categories
  - Graph 10: launches with refillable claims, 2018-23
- Good reception of SBS refills can be applied to other categories
- Differences in refill price positioning
  - Graph 11: avg € per 100ml/g in non-refillable products vs refillable products, by category, 2020-23

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- Combat the high entry price of refill products
  - Graph 12: avg € per 100ml/g in non-refillable products vs refillable products, by category, 2020-23
- Take inspiration from RECUP for refilling in store
- Tackle hygiene concerns about skincare refills
- Engage consumers with fun and durable packaging for makeup refills
- Fragrances offer refill opportunities in store and at home

### Attitudes towards sustainability

- Confusion around sustainability is front of mind for consumers
  - Graph 13: attitudes in relation to understanding of sustainability – NET, 2023
- Combat greenwashing to reassure consumers
- Cost savings will continue to be a priority for consumers
  - Graph 14: cost-related attitudes towards sustainability in BPC, NET, 2023
- Multiuse and longer-lasting claims can appeal to cost-conscious consumers
- Look to the future with consumers
  - Graph 15: attitudes towards sustainability in BPC, NET, 2023
- Support parents in their concerns about the future
- Saving cost and saving waste can be combined
- Secondhand beauty might appear on the radar again due to cost-of-living crisis

### Consumer typologies

- Germans can be split into four groups when it comes to sustainability
- Responsibility shifters – offer guidance on sustainable choices
- Disillusioned/paralysed – make sustainability convenient
- Motivate the disillusioned/paralysed through a view to the future
- Reframe sustainability discussions around hopefulness
- Informed but impeded – remove their barriers
- Deniers – motivate through financial incentives

## LAUNCH ACTIVITY AND INNOVATION

- Launches with ethical/environmental claims are still on the rise
- Ethical/environmental claims are used by a wide range of companies
  - Graph 16: launches with ethical/environmental claims, by ultimate company, 2021-23
- Prioritise sustainability over short-term gains
- dm launches no planet b, jumping on the trend of upcycled ingredients
- Shift focus to upcycled ingredients
- Estée Lauder shows commitment to green chemistry
- Educate and expand on niche green chemistry claims

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- Lab-grown ingredients show potential
- Eco/ethical claims have a strong presence in all categories
  - Graph 17: total vs environmental/ethical launches in BPC, by category, 2022
- Sustainable packaging continues to grow
  - Graph 18: NPD in BPC with ethical/environmental claims, by claim, 2020-23
- Explore different packaging options for refill pouches
- Different sustainable packaging materials can spark inspiration
- Wild launches compostable shower gel refill bottle
- Focus on waterless or no-waste products
- Take inspiration from true fruits' juice packaging

### Advertising and marketing activity

- Head & Shoulders lists minimal ingredients on pack
- dm celebrates the launch of no planet b
- Luxury fragrances present their refill offers
- Wella Professionals convince with sustainable hair products

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

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

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