

SUSTAINABILITY IN HOUSEHOLD CARE – GERMANY – 2023

With sustainability becoming an essential for brands and financial pressure remaining high, brands need to include Germans of every financial standing by, for example, price-matching eco-friendly and regular products.



Yasemin Holtemayer,
Household Care Research
Analyst, Germany



Sustainability In Household Care - Germany - 2023

This report looks at the following areas:

- The impact of the cost-of-living crisis on eco-friendly household care
- How concerned consumers are about the environment
- Which types of eco-friendly or regular products Germans purchase
- Purchase barriers of eco-friendly household care products, discussing price and lack of trust in eco-claims
- Usage of different refill concepts and usage barriers for in-store refill stations for household care products
- Attitudes around sustainability in household care, discussing natural ingredients, waste and acceptance of higher prices
- Recent launch activity and innovation in eco-friendly household care



With sustainability becoming an essential for brands and financial pressure remaining high, brands need to include Germans of every financial standing by, for example, price-matching eco-friendly and regular products.

Overview

Purchase of eco-friendly household care increased from 67% in 2021 to 70% in 2023. This highlights how the environment is growing in **importance** for consumers, helping to turn eco-friendly household care into a **spending priority** for many – despite financial pressure during the cost of living crisis. Even financially struggling household care shoppers were more likely to buy eco-friendly household care in 2023 than in 2021 (64% vs 58%).

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While household care's needs-driven nature makes it largely resilient against inflation, an even greater adoption of eco-friendly products was slightly hindered by rising prices. 58% of exclusively regular household care shoppers don't buy eco-friendly household care because it is too expensive. Own label can use price-matching strategies of regular and eco-friendly products to sway sceptical consumers.

Furthermore, **29% of household care shoppers** who don't buy eco-friendly products say it's because it's difficult to know which ones are truly eco-friendly. Brands can align with the EU Green Claims Directive to **simplify and harmonise comparability**, for example, through eco-scores.

Brands can also capitalise on refills' popularity among Gen Z household shoppers, of which **83%** use any refill concept, with refill NPD in categories with low refill claims for instance, such as toilet care. In-store refill stations in areas with young populations, like university towns, equally present an opportunity for brands.

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Report Content



EXECUTIVE SUMMARY

- The five year outlook for eco-friendly household care

Market context

- The cost-of-living crisis and stark price increases in household care burden household care shoppers
- Regulatory changes push eco-friendliness

Opportunities

- Don't treat sustainability as a premium
- Use events to engage Gen Z with in-store refills
- Leverage the health halo of natural ingredients to stand out

MARKET DRIVERS

The German economy

- Economic recovery to follow the slowdown in 2023
 - Graph 1: key economic data, in real terms, 2019-25
- The inflation rate is slowly bouncing back to more conventional levels
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and expenditure
 - Graph 2: financial confidence index, 2022-23
- The impact of the economy on the category

European regulations

- The European Green Claims Directive will ring in more transparency and easier-to-understand claims
- Household care refills will benefit from Green Deal goals

Waste management and plastic use

- Waste levels reach an all-time high in Germany
- Recycling in Germany reached federal targets
- Shortage of recycled plastic affects household care products

WHAT CONSUMERS WANT AND WHY

Concern about the environment

- Concern about the environment translates into action
 - Graph 3: level of concern about the environment, 2023

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- Appeal to those concerned who are not buying eco-friendly with easy-to-compare score systems

Purchase behaviour of regular and eco-friendly household care products

- Eco-friendly products are becoming more popular among consumers
 - Graph 4: types of household care products bought in the last six months, NET, 2021-23
 - Graph 5: types of household care products bought in the last six months, NET, 2021-23
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- Highlight child safety on pack
- Focus on healthy ingredients for hand-dishwashing products
- Address performance concerns for green automatic dishwashing products
- Align aircare with consumers' focus on their health
- Highlight durability of eco-friendly cleaning equipment

Change in frequency of buying eco-friendly products

- Improve purchases of eco-friendly product categories to match Germans' perception of an eco-friendly lifestyle
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- Prove efficacy by breaking down eco-claims of popular products

Use of refill concepts

- Refill pouches and canisters are most popular among consumers
- Offer innovation in low-refill categories
- Attract consumers to aircare with low-cost refills
- Strengthen Gen Z's interest of in-store refill stations with guidance and incentives

Barriers for refill station use

- More than half of household care shoppers don't have access to a refill station
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Attitudes towards eco-friendly household care products

- Engage German consumers with an incentive for acting sustainable
 - Graph 10: attitudes towards eco-friendly household care products, 2023
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- Place German-grown ingredients at the forefront for those who associate natural with sustainability
- Implement easy and harmonised score-systems
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- Combine sustainability with convenience to appeal to consumers
 - Graph 11: convenience is more important than sustainability, 2021-23
- Use price-matching to offer consumers a choice between eco-friendly and regular household care products
 - Graph 12: agreement with "It is acceptable for eco-friendly household care products to be more expensive than regular ones", 2023

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- Ethical and environmental claims lead the way in homecare
 - Graph 13: NPD in household care products, by claim category, 2020-23
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- Examples of household care NPD with eco and convenience claims
- Most household care product launches carry environmental claims
 - Graph 14: proportion of household care product NPD carrying any ethical & environmental claim, by category, 2020-23
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- ...but own label NPD features more ethical and environmental claims
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- Higher recyclability through improved design
- Easier to dose and better for the environment

APPENDIX

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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