

# 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.



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# 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
- Regular products are becoming increasingly eco-friendly
- Eco-friendly purchases increase across all financial situations
- Paper products remain the leader for eco-friendly purchases
  - Graph 6: purchase of regular or eco-friendly versions of household care products, 2023
- Stand out with eco-claims besides recycling
- 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
  - Graph 7: change in eco-friendly household care purchases compared to 12 months ago, 2023
- Financial situation influences the ability to purchase more eco-friendly products than before

## Barriers for buying eco-friendly household care products

- Price is the biggest barrier for purchasing eco-friendly products
  - Graph 8: barriers for buying eco-friendly products, 2023
- Own labels can sway those concerned about eco-products prices
- 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
  - Graph 9: barriers for using refill stations, 2023
- Target young areas to expand in-store refill stations
- Use online shops and click-and-collect to increase the reach of refills
- Educate Gen Z on how to use in-store refill stations via social media to raise confidence

## 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
- Offer incentives for returning product packaging during special events
- Place German-grown ingredients at the forefront for those who associate natural with sustainability
- Implement easy and harmonised score-systems
- Increase refill concept offers to appeal to Gen Z
- 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

## LAUNCH ACTIVITY AND INNOVATION

- Ethical and environmental claims lead the way in homecare
  - Graph 13: NPD in household care products, by claim category, 2020-23
- Focus on different claim categories to stand out
- 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
- Continued growth of ethical and environmental claims in 2023
- Increased focus on eco-friendly packaging and recycling
  - Graph 15: proportion of NPD in the household care category, by ethical and environmental claims, 2020-23
- Packaging conveys the message of eco-friendliness
- Examples of refill NPD launches
- Use biodegradable and toxin-free claims to appeal to consumers avoiding harsh chemicals
- Branded products dominate NPD launches...
- ...but own label NPD features more ethical and environmental claims
  - Graph 16: proportion of new household care product launches carrying any ethical or environmental claims, by own label, 2020-23
- Examples for own-label NPD with ethical and environmental claims
- Henkel continues to be the driving force behind ethical and environmental claims
  - Graph 17: branded NPD in household care products with ethical and environmental claims, by top 10 companies, 2019-20
- Branded household paper products may struggle against own-label competition
- Examples of branded NPD with ethical and environmental claims

## **Advertising and marketing activity**

- Questioning why things need to be thrown away
- 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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