

TOILET AND HARD SURFACE CARE – GERMANY – 2020

Building rapport with men, holistically innovating with green products and leveraging population dynamics once the COVID-19 outbreak has cleared will drive future growth for household care brands.



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Report Content

EXECUTIVE SUMMARY

Note on COVID-19

- COVID-19's impact on toilet and hard surface care and German consumer behaviour
- Mintel's perspective

Market context

- COVID-19 impacting on German consumers
- Consumer spending remained confident despite flat economic growth
- The rise in single households redefines cleaning responsibility in the future
 - Graph 1: unattached people in one-person households by gender and age, in thousands, 2018
- The rise in single households redefines cleaning responsibility in the future
- 'Old' and 'green' dominate the market

Mintel predicts

- Stagnating growth expected to continue
- Stagnating growth expected to continue
- Stagnating growth expected to continue
- Short-term boost in sales due to COVID-19
- The impact of COVID-19 on toilet and hard surface care

What consumers want, and why

- Consumers want: convenience
 - Graph 2: formulas used for hard surface cleaning products in the last six months, January 2020
 - Graph 3: products used to keep toilet fresh and clean in the last six months, January 2020
- Consumers want: convenience
- Consumers want: to experiment
- Consumers want: to experiment
 - Graph 4: usage of selected hard surface cleaning products, by age and gender, January 2020
- Consumers want: sustainable packaging
 - Graph 5: behaviours towards toilet and hard surface cleaning and care products, January 2020
- Consumers want: sustainable packaging
- Consumers want: guidance
 - Graph 6: attitudes towards toilet and hard surface care, January 2020
- Consumers want: guidance

Opportunities

- Even out the domestic playing field
- Adopt a holistic approach to sustainability
- Adopt a holistic approach to sustainability
- Scope to build innovation on young consumers

The competitive landscape

- Henkel closely followed by private label brands

Marketing mix

- A snapshot of the toilet and hard surface care market
- Quick Download Resources

MARKET DRIVERS

- One in four Germans showed higher levels of concern about being exposed to COVID-19
 - Graph 7: "How worried are you about the risk of being exposed to the Coronavirus (also known as COVID-19)?", March 3-16, 2020
- Germans are equally concerned about the impact on their lifestyle
 - Graph 8: "To what extent are you worried about how the outbreak might affect your lifestyle?", March 3-16, 2020
- Initial signs of economic uptick in Germany in 2020
- Stagnating German economy in 2019
 - Graph 9: % change in GDP from previous quarter, 2015-19
- Consumer spending a robust pillar of the German economy
- Demographic reality takes shape
 - Graph 10: share of maximum adult population projections, by age group, 2020-30
- Demographic reality takes shape
- Ageing demographic threatens value sales
- Ageing population causes shifts in cleaning habits and consumption patterns
- Ageing population causes shifts in cleaning habits and consumption patterns
- Record number of single households in Germany
- Record number of single households in Germany
 - Graph 11: share of households by size, 1991 and 2018
- More young men live alone
 - Graph 12: unattached people in one-person households, by age and gender, in thousands, 2018
- Uneven distribution of parental leave
- Consumers demand companies to be eco-friendly through...
- Incentivising companies to go green
- EU Eco label

- Incentivising companies to go green
- Incentivising companies to go green
- A willingness to pay more for eco-friendly products
- Legal push for circular economy
- Companies and retailers also take a stand
- Zero-waste gains momentum

WHAT CONSUMERS WANT, AND WHY

Behaviour around COVID-19

- Germans use cleaning products more often as a response to COVID-19 outbreak
 - Graph 13: "Have you or your family made any changes as a result of the COVID-19/Coronavirus outbreak?", March 2020*
- Germans use cleaning products more often as a response to COVID-19 outbreak

Cleaning and buying responsibility

- Gender cleaning gap
 - Graph 14: responsibility for cleaning surfaces, including toilets, by gender, January 2020
- Women run the show also when buying products
 - Graph 15: responsibility for buying surface-cleaning products, including toilet cleaners, by gender, January 2020
- Women run the show also when buying products
- As Germans age, the gender cleaning gap widens
 - Graph 16: responsibility for cleaning surfaces, including toilets, by age and gender, January 2020
- As Germans age, gender cleaning gap widens
- Mintel Trend The Unfairer Sex
- Gender cleaning gap of 36 percentage points among parents
 - Graph 17: responsibility for cleaning surfaces, including toilets, by parental status, January 2020
- Maintain short-term focus on most-engaged consumers
- Increase focus on men in the long term

Usage of toilet care and hard surface cleaning products

- Liquid cleaner/gel by far most commonly used toilet cleaner
 - Graph 18: products used to keep toilet fresh and clean in the last six months, January 2020
- Bleach not popular among Germans
- Multipurpose cleaner by far most commonly used hard surface formula
 - Graph 19: formulas used for hard surface cleaning products in the last six months, January 2020
- Unlocking opportunities for specialist cleaners
- Game of three in types of hard surface cleaning products
 - Graph 20: types of hard surface cleaning products used in the last six months, January 2020

Toilet and Hard Surface Care – Germany – 2020

- Households with young children use wipes twice as much
 - Graph 21: hard surface cleaner wipes usage, by age of children in the home, January 2020
- Young consumers redefine rules of cleaning
 - Graph 22: usage of selected hard surface cleaning products, by age and gender, January 2020
- In search of singularity
- In search of singularity

Cleaning frequency

- Germans are obsessed with cleaning
 - Graph 23: average cleaning frequency, January 2020
- A tidy home as a space for happiness
- A tidy home as a space for happiness

Behaviors around toilet and hard surface care formulations

- Consumption anchored in sustainability
 - Graph 24: behaviours towards toilet and hard surface cleaning and care products, January 2020
- Less packaging is more
- Less packaging is more
- Water-free products are high in demand among young Germans
 - Graph 25: % who prefer to use products that require less or no water to clean, by age and gender, January 2020
- Scent is an important driver for purchase
 - Graph 26: % who like to try new scents of cleaning products, by gender and age, January 2020
- Young males challenge traditional gender norms with scent
 - Graph 27: top three preferred scent types, by age and gender, September 2019
- Target young males with sweet and fresh scents
- Target young males with sweet and fresh scents

Attitudes towards toilet and hard surface cleaning and care

- Environmental impact of cleaning formulations under scrutiny
 - Graph 28: attitudes towards toilet and hard surface care, January 2020
- Consumers need guidance
- Consumers need guidance
 - Graph 29: attitudes towards toilet and hard surface care, by always reading usage instructions on pack, January 2020
- Promoting understanding of cleaning formulations
- Room for packaging innovations
 - Graph 30: usage of hard surface cleaning products, by attitudes towards toilet and hard surface care, January 2020
- Room for packaging innovations
- Target the middle category to up usage of cleaning wipes

LAUNCH ACTIVITY AND INNOVATION

- Drop in overall NPD in toilet care
 - Graph 31: toilet care NPD, by subcategory, 2015-19
- New launches of liquid cleaners target scents and value packs
- A rise in ethical claims in toilet care
 - Graph 32: NPD in toilet care, by leading claims, 2017-19
- Eco-friendly formula claim most appealing among consumers
- Eco-friendly formula claim most appealing among consumers
 - Graph 33: most appealing on-pack claims when buying household care products, 2019
- The rise in ethical claims corresponds to consumers' wants
- Scent a key driver in toilet care
 - Graph 34: share of NPD in toilet care, by launch type, 2015-19
- Scent a key driver in toilet care
- Range extensions dominated by citrus and fresh scents
 - Graph 35: NPD in toilet care, by top 10 fragrance component groups, 2019
- Henkel's new scents are a driver for growth
- Overall NPD falls in hard surface care
 - Graph 36: NPD in hard surface care, by subcategory, 2015-19
- Overall NPD falls in hard surface care
- Examples of multipurpose cleaner launches
- Claims in hard surface care are a matter of ethical concern
 - Graph 37: NPD in hard surface care, by leading claims, 2017-19
- Claims in hard surface care are a matter of ethical concern
- New packaging is accelerating in hard surface care
 - Graph 38: NPD in hard surface care, by launch type, 2015-19
- New packaging is accelerating in hard surface care
- Citrus and fresh also popular in hard surface care
 - Graph 39: NPD in hard surface care, by top 10 fragrance component groups, 2019
- Hard surface care brands using scent to stand out
- Big players underrepresented
 - Graph 40: NPD in toilet care, by top 10 companies, 2019
 - Graph 41: NPD in hard surface care, by top 10 companies, 2019
- Big players underrepresented
- New private label brand Respekt
- Unilever's 100% recycled plastic bottles
- Refill stations as an answer to packaging waste

- Refill stations as an answer to packaging waste
- Rossmann pilots refill stations with Henkel products in the Czech Republic

Advertising and marketing activity

- Sagrotan's wipes tapping into biodegradability
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- For the greater good: Werner & Mertz GmbH educating companies and consumers
- For the greater good: Werner & Mertz GmbH educates companies and consumers
- Henkel's scent proliferation

MARKET SHARE

- Private label brands hot on Henkel's heels
- Segment growth driven by Henkel...
- Segment growth driven by Henkel...
- ...and by private labels
- Established brands face difficulties in going green
- Brands need to become more creative to stand out
- Brands need to become more creative to stand out

MARKET SEGMENTATION, SIZE AND FORECAST

Forecasting during the COVID-19 pandemic

- Note on forecast in response to COVID-19
- Flat growth in the household cleaner market
- Flat growth in the household cleaner market in the future
- Flat growth in the household cleaner market in the future
- Stagnating growth expected to continue
- Short-term boost in sales due to COVID-19
- The impact of COVID-19 on toilet and hard surface care
- Household cleaner market dominated by toilet and hard surface care products
- Household cleaner market dominated by toilet and hard surface care products

APPENDIX

Appendix – products covered, abbreviations and consumer research methodology

- Products covered in this Report
- Abbreviations
- A note on language usage

- Consumer research methodology

Appendix – market size and forecast

- Forecast methodology
- Forecast methodology – fan chart
- Market size and forecast – value
- Market size and forecast – value – best- and worst-case

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