

TOILET AND HARD SURFACE CARE – GERMANY – 2022

Cushioned by the needs-driven nature of the market, brands can count on continued consumer reach in times of inflation and focus on embracing circular supply chains from local materials.



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Toilet And Hard Surface Care - Germany - 2022

This report looks at the following areas:

- The short-, medium- and long-term impact of inflation and supply chain issues on toilet and hard surface care
- Purchasing responsibilities and usage of toilet and hard surface care, including usage of hard surface care by location
- Purchasing interest in toilet and hard surface care products surrounding local materials, formulations and packaging
- Behaviours and attitudes towards toilet and hard surface care, including importance of product performance and home hygiene, purchasing channels and eco-friendly concepts
- Launch activity and innovation opportunities, including reflection on brand shares and market size



Cushioned by the needs-driven nature of the market, brands can count on continued consumer reach in times of inflation and focus on embracing circular supply chains from local materials.

Overview

70% of toilet and hard surface care users prefer short ingredient lists over long ones. The same share prioritises product performance over all other product attributes. Brands are now facing the dilemma of having to achieve more with less. Stripping formulas down to essentials and tapping into underrepresented free from claims provides one way of satisfying consumers' demands.

This could equally alleviate some of the inflationary pressure since toilet and hard surface care products are exposed to price increases through rising costs on raw materials and supply

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chain issues. Consumer reach is unlikely to drop given the needs-driven nature, low purchasing frequency and low share on the overall household budget of cleaning products. Regardless, Germans display an overall heightened price sensitivity due to financial concerns. Fading home hygiene concerns further aggravate the threat of consumers downgrading on cleaning products or cleaning frequencies.

Brands can counterbalance these tendencies by turning scrutiny on ingredients into curiosity. Preference for short ingredients greatly stems from rising health and sustainability concerns. Hence, concepts that align with these priorities, such as nature-inspired protective films for greater performance, organic or plant-based disinfectants, or natural polishing aids to avoid microplastics will keep consumers engaged.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for toilet and hard surface care

Market context

- The impact of the economy on the toilet and hard surface care market and consumers
- Demographic change set to impact cleaning demand
- Health and environmental concerns top of mind for German consumers

Mintel predicts

- Market size & forecast for toilet and hard surface care
- Minimal rebound following exceptional pandemic-induced boost
- Stable long-term outlook for toilet and hard surface care

Opportunities

- Emphasise local strengths
- Strip formulas down to essentials
- Accelerate online growth by adapting to the different demands of generations

The competitive landscape

- Financial concerns threatening success of premium brands in toilet care
 - Graph 1: brand value shares in toilet care, top five, 2020-21
- Expansion of eco-friendly products and claims in hard surface care
 - Graph 2: brand value shares in hard surface care, top five, 2020-21
- Quick download resources

MARKET DRIVERS

The German economy

- German economy hit hard by COVID-19 disruptions
- Strong post-COVID-19 bounceback followed by a period of slower growth
 - Graph 3: key economic data, in real terms, 2019-23
- The impact of the economy on consumers' financial confidence
 - Graph 4: change in financial situation since the start of the COVID-19 outbreak, 2021-22*
- The impact of the economy on the toilet and hard surface care market

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- The impact of the economy on the toilet and hard surface care consumers

Demographic change

- Embrace rising share of one-person households
 - Graph 5: households and projected household, by type of household, 2000-40
- Expansion of living space to drive needs of product performance
 - Graph 6: average living space per flat and per capita, 2000-20
- Poor housing conditions – an opportunity for brands to prove their ethics

Health & wellbeing

- Wellbeing taking centre stage at home
- Support scientific and technological advances for improved consumer guidance

Sustainability & climate change

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- Promote reuse to avoid recycling dilemmas
 - Graph 7: used sales packaging collected from private consumers, by type of material, 2018-20

WHAT CONSUMERS WANT AND WHY

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- Single households to push purchasing responsibilities even further
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- Challenge ingrained gender norms to tackle the gap in cleaning responsibilities
 - Graph 9: cleaning responsibilities for hard surfaces and toilets, by gender and age, 2022
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Usage of toilet care products

- Fading usage of liquid toilet cleaners bound to be challenged further
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Usage of hard surface care products

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 - Graph 11: usage of hard surface cleaning and care product types, 2021-22
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- Adapt packaging to the needs of concentrated formulas
- Examples of NPD in hard surface cleaners featuring concentrated formulas
- Divert investments from single-use products
- Target Gen Z's explorative nature via social media

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 - Graph 13: usage of hard surface cleaning and care formula - NET, by generation, 2022
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 - Graph 15: purchasing interest for toilet and hard surface care products, 2022
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- Emphasise local strengths
- Utilise nature for inspiration on ingredients and product concepts
- Combine convenience with local production and sustainable concepts to maximise appeal

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- ...with product samples

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 - Graph 28: branded NPD in hard surface care, by top 5 leading companies, 2019-22
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- Premium, all-in-one solution by market leader WC Frisch

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- WC Ente tapping into hygiene and financial concerns
- Long-lasting protection for reduced cleaning need
- Frosch launched award-winning refill pouch ideal for recycling
- Heitmann supporting pure range with social media efforts
- Rossmann turning green household care into environmental activism

MARKET SHARE

Toilet care

- Sagrotan's disinfecting toilet cleaners continued to generate growth
- Financial concerns threatening success of premium brands

Hard surface care

- Eco-friendly brand, Frosch, taking market lead among hard surface care brands
- Expansion of eco-friendly products and claims in hard surface care
- Private label to refocus minimal resources on sustainable varieties

MARKET SIZE, SEGMENTATION AND FORECAST

- Small rebound following exceptional sales growth

Toilet care

- Toilet care with stable development in 2021
- Toilet cleaners bound to grow back stronger

Hard surface care

- Diminishing home hygiene lets disinfectants dip
- Disinfectants handing market share back to other segments
- Highlight surface protection to reinvigorate furniture cleaners

Forecast

- Stable long-term outlook for toilet and hard surface care
- Short-term decline
- Mid-term decline
- Long-term stabilisation

APPENDIX

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

- Products covered in this Report
- Abbreviations

Toilet and Hard Surface Care – Germany – 2022

- Consumer research methodology
- TURF methodology
- TURF analysis – “I would be interested in buying toilet and hard surface cleaning products that...”
- A note on language

Appendix – market size and central forecast methodology

- Forecast methodology
- Forecast methodology – fan chart
- Market size and forecast – value
- Market forecast and prediction intervals – value
- Market value shares

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