

TOILET & HARD SURFACE CARE – GERMANY – 2024

With own label gaining market share, investing in NPD around unique scents (eg food-inspired) or odour-removal technology will give brands an edge.



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Toilet & Hard Surface Care – Germany – 2024

This report looks at the following areas:

- The short-, medium- and long-term impact of the economic situation and inflation on the toilet and hard surface care market
- Usage and purchase of toilet and hard surface care products, and how it compares to previous years
- Scent preferences for both toilet and hard surface care
- Behaviours towards hard surface care, and attitudes towards toilet care
- Launch activity and innovation opportunities for toilet and hard surface care brands
- Market size and share for toilet and hard surface care



With own label gaining market share, investing in NPD around unique scents (eg food-inspired) or odour-removal technology will give brands an edge.

Overview

70% of consumers with cleaning responsibilities who think that it is difficult to understand why specialist cleaners should only be used for specific surface types are more likely to use specialist cleaners for purposes besides the intended one (vs 54% who disagree), **pointing towards a lack of education.**

Despite the needs-driven nature of toilet and hard surface care, two years of high inflation and price hikes across different product categories put strain on German consumers, pushing growth in own labels.

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Multipurpose cleaners are often the go-to choice for many surfaces, threatening specialist products. Yet, as prices of multipurpose cleaners rise, there's a unique **chance for specialist cleaners to show their value**. Brands should highlight the superior results of using specialist products compared to multipurpose ones. Also, educating consumers about the benefits of specialist cleaners for sensitive surfaces like wood can further solidify their market position.

Younger consumers are experimenting more due to their lack of experience, which is reflected in both their higher use of a variety of products and their interest in scents besides citrus. At **68% and 71% respectively**, consumers aged 16-24 and 25-34 with cleaning responsibilities show higher interest in food scents other than fruit (vs 27% of those aged 65+). Thus, tapping into BPC trends, such as vanilla scents, will resonate with them and make a product stand out.

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Report Content

EXECUTIVE SUMMARY

- The five year outlook for toilet and hard surface care

Market context

- Financial pressures remain due to inflation and price hikes
- Young consumers are an essential demographic for brands

Mintel predicts

- Market size & forecast
- Inflation and high product prices push the market
- A stagnating market is expected in the long-term

Opportunities

- Strengthen specialist products through education
- Push scent and odour-removal NPD
- Appeal to younger consumers by highlighting product range and unique scents

The competitive landscape

- Own label continues to grow due to inflation

MARKET DRIVERS

The German economy

- 2024 is expected to remain challenging
 - Graph 1: key economic data, in real terms, 2019-25
- The inflation rate is bouncing back to more conventional levels
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and expenditure
 - Graph 2: financial confidence index, 2022-24
- The CPI of multipurpose products continued to rise
 - Graph 3: consumer price index, 2023-24
- The impact of the economy on the toilet and hard surface care category

Polycrisis

- Fragrance in the home to lift spirits

Demographics

- Young consumers are the key demographic for brands

WHAT CONSUMERS WANT AND WHY

Cleaning and buying responsibilities

- Cleaning and purchase responsibilities remain similar to each other
 - Graph 4: toilet and hard surface care purchasing responsibilities, 2024
 - Graph 5: toilet and hard surface cleaning responsibilities, 2024
- Stable cleaning and purchase responsibilities influence product usage

Usage of toilet care products

- The popularity of liquid toilet cleaner continues to fade
 - Graph 6: usage of toilet care products, 2020-24
- New formats and a heightened interest in disinfectants threaten liquid toilet cleaners
- Younger consumers are less likely to use liquid toilet cleaners...
- ...giving way for brands to showcase their range of products on social media

Usage of hard surface care products

- Usage of hard surface care products remains largely stable
 - Graph 7: usage of hard surface care products, 2023-24
- Strengthen multipurpose products' position with unified scents at home
- Underscore the efficacy of window cleaners

Suitability of different hard surface care cleaning products

- Multipurpose cleaning products reign supreme in consumers' suitability perception
 - Graph 8: suitability of different hard surface care cleaning products, 2024
- Multipurpose products' convenience makes them popular for a variety of surfaces
- Compare cleaning results to show specialist products' functionality

Scent preferences in toilet and hard surface care

- Traditional scents are favoured by consumers
 - Graph 9: scent preferences for toilet care products, 2024**
 - Graph 10: scent preferences for hard surface care products, 2024*
- Build on citrus scents' appeal using real ingredients and diverse citrus choices
- Take note of younger consumers' interest in scents inspired by BPC trends...
- ...and entice them with unique food scents in household care

Behaviours around toilet and hard surface cleaning products

- The popularity of scented products is underscored by the wish for them to last longer

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- Be specific about how long product scents last on pack
- Education is crucial to push specialist cleaners
- Justify prices of specialist cleaners with functionality explanations

Attitudes towards toilet and hard surface care

- Consumers almost unanimously agree that bad odours need to be removed instead of just covered
 - Graph 11: attitudes towards toilet and hard surface care, 2024
- Step up NPD efforts in odour-removal and explain the science behind new odour-removal technologies
- Increase product versatility by highlighting outdoor use

LAUNCH ACTIVITY AND INNOVATION

Toilet care

- NPD in toilet care stays stable
- Packaging remains one of the main focuses of brands
 - Graph 12: NPD in toilet care, by launch type, 2021-24
- Examples of 'new packaging' in NPD
- Antibacterial claims exhibit a rapid surge in 2023
 - Graph 13: NPD in toilet care, by top 10 leading claims
- Antibacterial claims appeal to a younger demographic
- Examples of 'antibacterial' in NPD
- Economy claims are not only used by own label brands

Hard surface care

- Multipurpose products continue to be the most launched product category
 - Graph 14: NPD in hard surface care, by sub-category, 2021-24
- Multipurpose products are fighting for consumers' favour
- New variety launches can appeal to those looking for unique scents
 - Graph 15: NPD in hard surface care, by launch type, 2021-24
- Botanical and herbal claims saw a significant rise
 - Graph 16: NPD in hard surface care, by top 10 leading claims, 2021-24
- Botanical claims are becoming more relevant as shoppers look for natural ingredients
- Examples of 'botanical/herbal' claims in NPD
- Henkel maintains its lead in toilet care while own label leads in surface care
 - Graph 17: NPD in hard surface care, by top-five leading companies, 2021-24
 - Graph 18: NPD in toilet care, by top-five leading companies, 2021-24
- Popular brands are launching fewer products amidst financial uncertainties
- Brands continue to increase launches in both toilet and hard surface care
 - Graph 19: branded vs own-label NPD in hard surface care, 2021-24

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- Graph 20: branded vs own-label NPD in toilet care, 2021-24

- Own label determines the way in toilet and hard surface care

Advertising and marketing activity

- Reduced time spent cleaning
- Hygiene all around the house

MARKET SHARE

- Own label increases its lead amidst cautionary spending
- An opportune time for own label brands to grow further
- Brands need to step up their efforts to stay competitive

MARKET SIZE, SEGMENTATION AND FORECAST

- After a slight dip, value sales grew slightly in 2023
- High inflation rates boost the category

Toilet care

- Toilet cleaners are the only category with positive growth
- Increase ancillary products' sales with gourmand scents

Hard surface care

- Hard surface care recovers after a decline the year before
- Kitchen surface cleaners support growth in the category

Forecast

- A stagnating market is expected in the long-term
- Back to more conventional growth levels in the short-term
- A slight rise in the mid-term
- Long-term stagnation

APPENDIX

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

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

Appendix – market size and central forecast methodology

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

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