

WOMEN'S FACIAL SKINCARE – GERMANY – 2023

Proactive skincare prevails, while the economic climate curbs experimentation. Routines boost confidence and relieve stress, which bodes well for future recovery.



Susanne Krenz, Principal Research Analyst - Beauty and Personal Care



Women's Facial Skincare - Germany - 2023

This report looks at the following areas:

- The impact of the the cost-of-living crisis and rising inflation on women's facial skincare
- The usage and purchase of women's facial skincare in the 12 months to May 2023, where serums are more than a flash in the pan and essentials crystallise
- Behaviours around women's facial skincare, revealing that many women are reluctant to experiment
- Spending on facial skincare, where women splurge on treatments and save on cleansers
- Purchase drivers, where active ingredients and long-lasting results outrank price
- Attitudes towards women's facial skincare, which show that effectiveness and prevention are cornerstones of women's regimes
- Launch activity and innovation, responding to consumer demand for barrier care, with a focus on mass(tige) brands



Proactive skincare prevails, while the economic climate curbs experimentation. Routines boost confidence and relieve stress, which bodes well for future recovery.

Overview

Only **6%** of female facial skincare users disagree that catering to skin type is more important than tackling skin issues. This points to a **proactive approach to skincare that favours prevention over treatment**. However, as the age group most likely to experience **visible signs of skin ageing**, such as wrinkles/fine lines and hyperpigmentation, **women over 55 are more likely to prioritise active ingredients that can achieve visible results**.

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In a market hit by inflation and declining real wages, category growth continues to be elusive. Market share of own labels **decreased in 2022** as **women resorted to trusty mass(tige) brands**. But as of July 2023, **46% of German women are considering purchasing more own-label beauty products**, which bodes well for these brands.

In the current economic climate, **there is little willingness to try new things or engage with skincare trends**, which has led to a decline in usage of some products. Changing habits and **adverse beliefs around makeup impact cleansing frequency**.

For many women, their **skincare regimes are closely tied to confidence and wellbeing**. Those who still earn good money and like to spend it on skincare are more prone to layering products, adding steps to their routines, and experimenting with brands. This allows for **a positive outlook for women's facial skincare once the economy bounces back**.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five-year outlook for women's facial skincare

Market context

- Amid financial strains, Germans scrutinise their repertoires
- Flexible work shapes beauty routines
- Skincare boosts confidence and helps manage stress

Mintel predicts

- Market size and forecast
- Lip care and mass(tige) brands are beacons of light
- Modest growth expected for women's facial skincare

Opportunities

- Shine a light on life stage-specific skincare solutions
- Launch skincare with anti-ageing actives to reach over-55s
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- Cater to the preferences of high spenders
 - Graph 2: importance of long-lasting results and active ingredients, by amount typically spent on a single skincare product, 2023
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 - Graph 3: average price/100ml in women's facial skincare, by price positioning, 2022-23
- Scale prescription skincare with the help of AI
 - Graph 4: female facial skincare users who believe prescribed skincare to be more effective, by those who think that AI will positively impact society, 2023

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- ...confidence and consumer expenditure
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- Low-pressure retail environments have appeal

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Women's Facial Skincare – Germany – 2023

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- L'Oréal gains ground, Beiersdorf faces a slight dip

MARKET SIZE, SEGMENTATION AND FORECAST

Market segmentation

- Income squeeze has a tight grip on facial skincare
- Post-pandemic readjustments spawn volatile developments in different segments

Market size and forecast

- 5% upswing predicted for women's facial skincare by 2028
- Lip care and mass(tige) segments: building blocks to recovery?

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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