

WOMEN'S HAIRCARE – GERMANY – 2021

As an essential product category for most German consumers, women's haircare has proved to be largely resilient during the pandemic.



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Report Content



EXECUTIVE SUMMARY

- Mintel's perspective

The impact of COVID-19 on women's haircare

- COVID-19 affects styling products more harshly than shampoo and conditioner
- COVID-19's impact on women's haircare and German consumer behaviour

Market context

- Lockdown history
- COVID-19 has put more attention on the environment
- Ageing population offers possibilities for haircare marketers
 - Graph 1: share of maximum population projections for women, by age group, 2020-30

Mintel predicts

- Haircare is set for a steady increase
- Market size following the COVID-19 outbreak: shampoo and conditioner
- Shampoo and conditioner sales forecast to increase by 11% from 2020 to 2025
- Modest prospects for styling products up to 2025
- Market size following the COVID-19 outbreak: styling products
- Hair styling sales will decline more slowly up to 2025

What consumers want and why

- Consumers want: haircare that makes them feel better
 - Graph 2: women who have used their haircare/styling routine to help de-stress/unwind, by age, January 2021
- Wellbeing could encourage consumers to slow it down
- Consumers want: water-free haircare
- Consumers want: products with a lower carbon footprint
 - Graph 3: women who have used/are interested in using locally-made haircare/hairstyling products, by age, January 2021
- Consumers want: more sustainable packaging options
 - Graph 4: women who have used/are interested in using refillable haircare/styling products, by age, January 2021

Opportunities

- More potential to explore scalp care
- Make it personal
 - Graph 5: personalised haircare/styling products with highest interest, January 2021

Women's Haircare – Germany – 2021

- Focus on inner beauty
 - Graph 6: women* who have taken beauty supplements in the last three months, by age, July 2020 and March 2021
- Hair fragrance could be a new avenue for brands
 - Graph 7: usage of hair perfume, by age, September 2019
- Hair fragrance could be a new avenue for brands
- Pay attention to women aged 55+
- Personalisation appeals to women aged 55+

The competitive landscape

- Big players rule the roost
- L'Oréal leads for shampoo and conditioner sales and Henkel for styling products
 - Graph 8: company % shares of shampoo and conditioner and styling product value sales, 2020

The marketing mix

- Many opportunities to grow the market, but keeping it sustainable is key
- Quick download resources

MARKET DRIVERS

- Ongoing lockdown
- The impact of COVID-19 on the German economy
 - Graph 9: key economic data, in real terms, 2019-22
- Brexit: some disruption for German trade will be inevitable
- COVID-19 amplifies the need to protect the planet
- Brands are looking to be more sustainable
- Consumers want to take action
 - Graph 10: women who agree that its more appealing to act in an environmentally friendly way if you can see the results of your action, by age, October 2019
- Sustainability concerns are changing BPC purchasing habits
 - Graph 11: women's green beauty and personal care behaviours during the last 12 months, October 2020
- More consumers are buying from ethical brands
- Supporting local communities
- Ageing population offers possibilities for haircare marketers
 - Graph 12: share of maximum population projections for women, by age group, 2020-30

WHAT CONSUMERS WANT AND WHY

The impact of COVID-19 on haircare behaviours

- New needs in the next normal

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- Graph 13: haircare behaviours since the COVID-19 outbreak, January 2021
- Haircare routines boost users' wellbeing
- Help consumers deal with unruly hair
- COVID-19 reduces shopping trips and experimentation
 - Graph 14: change in haircare/styling product buying behaviour in the last 12 months, January 2021
- Young women remain keenest to try new haircare
 - Graph 15: change in behaviour towards experimenting with haircare/styling products brands they haven't used before, by age, January 2021

Usage of haircare products

- Liquid rules but solid is catching up
 - Graph 16: any usage of shampoo and conditioner in the last 12 months, January 2021
- Shampoo and conditioner use since the COVID-19 outbreak
 - Graph 17: usage of shampoo and conditioner compared to 12 months ago, January 2021
- Bar shampoos are trending
- A solid performance
- Use of dry shampoos is drying up
- Powder power
- Usage of hair styling and treatment products
 - Graph 18: any use of hair styling or treatment products in the last 12 months, January 2021
- Hair treatments are up; styling is down
 - Graph 19: use of hair styling or treatment products compared to 12 months ago, January 2021
- Hair styling is dipping...
 - Graph 20: women who have reduced the usage of heated styling tools since the COVID-19 outbreak, by age group, October 2020
- ...but scalp care is growing
 - Graph 21: any use of scalp treatments in the last 12 months, by age, September 2019 vs January 2021
- Consider products that soothe the scalp...
 - Graph 22: women's interest in pampering and stress-reducing BPC, October 2020
- Beauty supplements are on the rise
 - Graph 23: women* who have taken beauty supplements in the last three months, by age, July 2020 and March 2021
- Create edible hair benefits for different demographics

Interest in personalised haircare

- Personalisation is striking a chord
 - Graph 24: interest in personalised haircare/styling products, January 2021
- Ordering the perfect blend online
- Personalisation with boosters

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- Allow choice of scent and packaging
 - Graph 25: interest in personalised haircare based on scent or packaging preferences, by age, January 2021
- Attract new demographics
- Target older women more directly

Interest in haircare/styling product features

- Sustainably sourced, refillable and locally made options top the rankings
 - Graph 26: interest in haircare/styling product features, January 2021
- Local manufacturing appeals across age groups
 - Graph 27: women who have used/are interested in using locally made haircare/hair styling products, by age, January 2021
- Indicate when products are made nearby
- Environmentally neutral vs climate neutral
- Strong demand for refills across all age groups
 - Graph 28: women who have used or are interested in using refillable haircare/styling products, by age, January 2021
- In-store refill stations are being introduced
- Tone-enhancing products are popular across all demographics
 - Graph 29: women who have used/are interested in using tone-enhancing haircare, by age, January 2021
- More potential for products to protect the scalp's microbiome
 - Graph 30: women who have used or are interested in using microbiome haircare, by age, January 2021
- Skincare for the scalp
- Strong interest in anti-pollution haircare
 - Graph 31: women who have used/are interested in using anti-pollution haircare, by age, January 2021
- Vinegar for hair health

Where haircare products are bought

- In-store sales continue to lead...
 - Graph 32: where haircare/styling products are bought, January 2021
- ...but online is slowly catching up

LAUNCH ACTIVITY AND INNOVATION

- Big brands dominate NPD...
 - Graph 33: haircare/styling product NPD by company, Jan 2017-Mar 2021
- ...while private labels are holding steady
 - Graph 34: haircare/styling product NPD by private label vs brands, Jan 2018-Mar 2021
- Hair treatments take a growing share of haircare NPD
 - Graph 35: haircare/styling products NPD by category, 2017 vs 2020
- 2020-21 – the rise of sustainability in footprint and packaging

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- Environmentally friendly NPD strikes a chord
 - Graph 36: haircare/styling product NPD by ethical & environmental claims, 2017 vs 2020
- Big brands are rolling out different refill concepts
- Packaging innovations from Henkel and Beiersdorf
- L'Oréal focuses on greener sciences and consumer recycling
- Sustainable formats appeal to consumers...
- ...as do environmentally neutral haircare products
- Solid formats are on trend
- Raising the bar
- Bar conditioners
- Powder formats are still very niche...
- ...but are now starting to appear on the market
- Powder shampoo for charity
- Make it quick
- Multifunctional goodness
- Superfruits provide a health halo
- Vegan claims trump organic
 - Graph 37: haircare/styling product NPD with organic and/or vegan claims, 2017-20
- Organic haircare is mainstream
- Organic conditioner for textured and curly hair
- Save our scalp
- Haircare for different lifestages
- Personalised haircare
- Colour-enhancing haircare
- Making styling more sustainable
- A new twist on dry shampoo
- Explore hair fragrance as a range extension
- Schwarzkopf celebrates 100 years of women's power
- Influencer and celebrity haircare

MARKET SHARE

- L'Oréal and Henkel in the lead
- New horizons for Wella

Company retail market shares of shampoo and conditioner, by value, 2019-20

- L'Oréal leads for shampoo and conditioner sales

Company retail market shares of hair styling products, by value, 2019-20

- Henkel takes the lead in styling products

MARKET SIZE AND FORECAST

Market size and forecast – shampoo and conditioner

- Haircare is set for a steady increase
- Shampoo and conditioner sales forecast to increase by 11% from 2020 to 2025

Market size and forecast – hair styling products

- Modest prospects for styling products up to 2025
- Hair styling sales will decline more slowly up to 2025

APPENDIX

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

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

Appendix – market size and forecast

- Forecast methodology
- Forecast methodology – fan chart
- Market size and forecast – shampoo and conditioner (value)
- Market size and forecast – shampoo and conditioners (value) – best and worst case
- Market size and forecast – hair styling products (value)
- Market size and forecast – styling products (value) – best and worst case

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