

WOMEN'S HAIRCARE – GERMANY – 2022

Even amid financial strain, haircare has benefited from consumer interest in skincare and wellness. Hair styling struggles to provide a sense of newness.



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Women's Haircare - Germany - 2022

This report looks at the following areas:

- The impact of COVID-19 and rising inflation on haircare and hair styling
- Usage and purchase of haircare in the last 12 months, which shows increased interest in scalp care and treatments, and usage and purchase of hair styling, which has been remarkably flat
- Hair textures of German women, signaling growing ethnic diversity
- Purchase channels which show that most buys still happen offline
- Purchase factors and intentions that reiterate the importance of scalp care and highlight the drive for personalisation
- Interest in innovation, eg tailored solutions and anti-hair loss products
- Attitudes towards women's haircare which reveal interest in ingredients and a need for help navigating the vast product offering
- Launch activity and innovation which is focused on scalp and skincare, eco/ethical claims and the growing prestige sector



Even amid financial strain, haircare has benefited from consumer interest in skincare and wellness. Hair styling struggles to provide a sense of newness.

Overview

Exacerbated by pandemic stress, hair loss is a hot topic for 41% of female haircare/styling buyers across age groups. It partially fuels the scalp care trend that steers purchase intent for 41% of haircare/styling buyers and intersects with interest in premium brands.

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Inflation will hamper haircare in the future but might bring the struggling hair styling category to its knees. Consumers might trade down on essential haircare products if their incomes are squeezed but will potentially steer away from less essential styling products altogether.

While financial strain is a dark cloud that hangs over everything, a lack of innovation especially in styling will contribute to stagnating growth. With eco/ethical claims approaching saturation, brands will need to innovate in other areas to provide additional value to consumers.

Connecting haircare to skincare as well as to wider health and wellness bears near endless potential for line extensions and brand extensions, eg in supplements. This connection can also further boost the prestige sector and fuel consumer interest in personalised haircare.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for women's haircare

Market context

- Rising inflation puts some strain on consumer spending
 - Graph 1: household and lifestyle issues faced in the last two months, 2022
- Opposing trajectories for haircare and styling

Mintel predicts

- Haircare will continue to outshine styling
- Market size & forecast: haircare
- Skinification to boost haircare
- Market size & forecast: hair styling
- Hair styling will struggle to keep up

Opportunities

- Connect health and hair
- Differentiate beyond eco/ethical
- Go premium or personalise...or both
- Be genuine (and on social media) to reach Gen Z

The competitive landscape

- Strong competition in haircare but a clear winner in hair styling
- Haircare is highly fragmented
 - Graph 2: brand shares of women's haircare, by value, 2021
- Henkel's Taft rules hair styling
 - Graph 3: brand shares of women's hair styling, by value, 2021
- Quick download resources

MARKET DRIVERS

- German economy hit hard by COVID-19 disruptions
- Strong post-COVID-19 bounceback followed by a period of slower growth
 - Graph 4: key economic data, in real terms, 2019-23

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- Rising inflation will impact everyday spending habits
 - Graph 5: household and lifestyle issues faced in the last two months, 2022
- Some consumers will trade down...
- ...while others will trade up
- Diversity takes centre stage

WHAT CONSUMERS WANT AND WHY

Usage of haircare products

- Scalp treatment is the standout
 - Graph 6: women's usage of haircare products, 2019-22
- A dry shampoo renaissance?
- Gen Z are losing interest in solids
 - Graph 7: women's usage of shampoo/conditioner bars, by age, 2021 and 2022

Usage of hair styling products

- Usage is stagnating...
 - Graph 8: women's usage of hairstyling products, 2019-22
- ...but the pandemic may have affected recall
- Use social media to boost styling products

Hair textures of German women

- A mix of hair textures represents growing ethnic diversity

Purchase channels for hair products

- Offline retail still main path to purchase
 - Graph 9: purchase channels of women's haircare, 2022
- Consumers crave experiences in 2022 and beyond
- Leverage partnerships, personalisation and social media to boost ecommerce

Haircare purchase intentions

- Marked interest in scalp health and premium brands
 - Graph 10: purchase intentions for women's haircare, 2022
- Premium scalp care holds promise
- Room for more premiumisation
- Two thirds of 16-24 year olds discover products on social media
- Subscriptions have a way to go

Purchase factors

- Price, fit and smell are key

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- Graph 11: purchase factors in women's haircare, 2022

- Cater for savvy shopping habits
- Introduce standards to address consumer confusion around eco/ethical claims
- Is Germany reaching peak organic?
- Increase relevance of reviews for 16-24s

Interest in innovation

- Personalisation and hair loss concerns are key innovation drivers
 - Graph 12: interest in innovation in women's haircare, 2022
- Hair loss is a hot topic
- Get to the root
- Haircare for wellness: Crown Affair
- Add in supplements
- Serve interest in personalisation
- Inspiration from the US: hyper-personalised haircare
- Simplify ingredient lists in haircare
- Align scalp care with skincare
- Deciem takes down chemical prejudice
- Offer protection from pollution and the elements
- Market waterless products to 55-64 year olds

Attitudes towards women's haircare products

- Consumers get curious
 - Graph 13: attitudes towards women's haircare, 2022
- Ingredients are front of mind
- Stand out with attractive packaging
- Inspiration from the UK: Monday Haircare
- Connect haircare and mental health
- Innovate in the unisex space
- Be intentional about diversity
- Improve on-the-go use
- Design for ease of use and accessibility

LAUNCH ACTIVITY AND INNOVATION

- Henkel is on a haircare high
 - Graph 14: launches in women's haircare/styling products, by ultimate company, 2019-22
- Guhl and Schauma freshen up
- L'Oréal rides the diversity wave

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- Prestige haircare is on the up...
- Ethical claims continue to climb
 - Graph 15: launches in haircare and styling products, by claim, 2019-22
- Supermarket PL taps into eco trends
- Next-level vegan
- (Almost) good enough to eat
- Trending format: serum
 - Graph 16: serum launches in haircare/styling products, 2017-22
- Trending ingredient: cica
- Biotech benefits beauty
- Haircare for Gen Alpha
- Dry shampoo finds new avenues
- Scalp treatments to suit every budget
- Luxury skincare brands foray into haircare

Advertising and marketing activity

- Guhl sees the signs of change
- Vegamour partners with Nicole Kidman
- Taft remakes iconic TV spot
- Garnier Fructis centres 'green' claims
- Schauma promotes its rebrand
- Solid shampoo for the whole family

MARKET SHARE

- Strong brands in haircare, little innovation in styling

Retail market share of haircare, by value, 2019-21

- Head&Shoulders stands out in a highly fragmented market

Retail market share of hair styling, by value, 2019-21

- Market leader Taft extends its lead while smaller brands gain traction

MARKET SIZE, SEGMENTATION AND FORECAST

- Haircare will drive growth as styling lags behind

Retail value sales of haircare, 2017-27

- Moderate growth projected for haircare

Retail value sales of hair styling, 2017-27

- Stagnating growth expected for hair styling

Market segmentation

- Moderate boost in value sales across segments in 2021
- Treatments/masks see strongest growth

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 – haircare
- Market forecast and prediction intervals – value – haircare
- Market size – value – hair styling
- Market forecast and prediction intervals – value – hair styling

Appendix – company shares

- Company shares – haircare
- Company shares – hair styling

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