

WOMEN'S HAIRCARE – GERMANY – 2023

While the impact of inflation remains noticeable, women's interest in serums, oils and scalp care is driving innovation in the haircare market.



Franziska Kartheus,
Associate Analyst



Women's Haircare - Germany - 2023

This report looks at the following areas:

- The market drivers for women's haircare including the impact of inflation, 'skinification' and the use of a wider range of products
- Haircare product usage including changes in frequency
- What consumers spent on haircare products and how to convey value beyond price
- Money-saving choices in the haircare routine, including the opportunity for new formats to stay within budgets
- Women's scalp concerns, showing the emerging focus of scalp health
- The interest in and avoidance of common haircare ingredients with transparency in ingredient purpose being key
- Preferred product claims with hair strengthening gaining the most interest
- Recent product launch activity and innovation
- Market share, size and forecast



While the impact of inflation remains noticeable, women's interest in serums, oils and scalp care is driving innovation in the haircare market.

Overview

Hair serums and scalp treatments are becoming more widely used by German women, linking to the skincare-inspired scalp care trend. Brands can address this interest with products that have scalp-caring benefits as **60% of women** experience some type of scalp issue.

However, as budgets remain tight during the high inflation, **84% of women who buy haircare products** would adjust their haircare routine if wanting to spend less on such products. **45% of**

BUY THIS REPORT NOW


€2600.00 | £2195.00 | \$2995.00*

store.mintel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

MINTEL

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.



women who buy haircare products would stock up when their preferred products are on offer and 41% would choose cheaper hair products. To avoid consumers trading down, brands need to justify their prices and show products' value. Innovative hybrid concepts and concentrates that promise long-lasting use will stand out as they justify a higher price point.

Using ingredients popular in skincare and offering products that support the scalp barrier will appeal to women focusing on hair and scalp health. Novel ingredients will benefit from clear messaging through on-pack information or QR codes that convey their benefits.

BUY THIS REPORT NOW

€2600.00 | £2195.00 | \$2995.00*

store.mintel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

MINTEL

Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

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

Market context

- Tight budgets pose a threat
- EU directives to improve transparency can provide opportunities for the haircare industry

Mintel predicts

- Haircare remains essential for women as many limit spending
- Market size and forecast
- Haircare is expected to retain growth

Opportunities

- Tighter budgets increase the need to focus on value beyond price to stand out
- Raise interest with gentle haircare
- Haircare beyond cleansing is gaining popularity
- Position scalp health for strong hair
- Focus on hair strengthening while offering long lasting results
- Pique interest with new formats; retain it with effectiveness
- Appeal throughout lifestages

The competitive landscape

- Brands maintain a strong hold on haircare
- Private label has gained share
 - Graph 1: brand shares of women's haircare, by value, 2022

MARKET DRIVERS

The German economy

- The German economy slips into a technical recession
 - Graph 2: key economic data, in real terms, 2019-24
- Inflation remains the key concern in 2023 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure
- Tighter budgets shape the haircare category

Women's Haircare – Germany – 2023

- 'Skinification' is taking over haircare
- Women are diversifying their haircare routines

WHAT CONSUMERS WANT AND WHY

Change in usage frequency over the past 12 months

- Haircare is part of almost every woman's routine
 - Graph 3: women's usage frequency of haircare products in the past 12 months, by product users, 2023
- Hair cleansing offers options
- Highlight the benefits of conditioner to keep interest
- Dry shampoo is a jack of all trades
- Solid choice for hair cleansing
- Solid haircare offers opportunities for consumers wanting more options...
 - ...but needs to prove it can keep up
 - New formats level the sustainability path...
 - ...and create opportunity for new sensory experiences
- Usage of more-varied products is changing the haircare landscape
 - Graph 4: women's usage of haircare products, 2017-23
- Boost the two-in-one market

Money spent on haircare products

- Haircare has a clear spending limit at €5 for the majority of women
 - Graph 5: women's spending on haircare products, 2023
- The budget for haircare
- Exploring the value of haircare
- Position treatments as self-care
- Let women see for themselves
- Offer new angles to show value
- Interest in social issues draws attention
- Keep it real to connect to women
- Show value through environmental commitments

Money-saving options

- German women show a high intent to save money
 - Graph 6: women's choices if wanting to spend less on haircare products, 2023
- Make less go further
- The thrill of finding a good deal goes beyond saving
- Prestige customers show brand loyalty
- Less can be more – with the right products

Scalp type

- Scalp issues are common among women
- Scalp care is the root of healthy hair
- Soothe irritation with scalp barrier support
- Young women are concerned about oily scalps
- Explicitly cater to young consumers

Ingredient awareness

- German women need guidance on haircare ingredients
 - Graph 7: awareness of haircare ingredients, 2023
- Bridge the knowledge gap to guide consumers to ingredients they need
- Silicones and sulphates are scapegoat ingredients
- Transition skincare ingredients into haircare
- Have it all with hair cycling

Product preferences

- Women prioritise results in their haircare routines
 - Graph 8: women's preferences in haircare products, 2023
- Guide women to the right ingredients
- Ease the path to the right information
- Women are eager to see visible long-term results in their haircare
- Focus on immediate and long-term results
- Heads up on scalp microbiome health
- Tackle hairloss and encourage growth
- Keep consumers engaged to see long-term results
- Women with oily scalps are on the hunt for long-lasting results
- Women with naturally textured hair need representation
 - Graph 9: women's hair textures, 2023
- Embrace diversity authentically
- Make salon treatments last longer
- Appeal to women through all lifestages

LAUNCH ACTIVITY AND INNOVATION

- Sustainable claims take the lead in NPD
 - Graph 10: ethical claims in women's haircare launches, 2021-23
- Dry shampoo has more to offer
- New products lead launches in haircare
- Brand-new products lead launches in haircare

Women's Haircare – Germany – 2023

- Graph 11: women's haircare product launches, by launch type, 2019-23
- NPD price positioning reflects the income squeeze
 - Graph 12: price positioning in women's haircare launches, 2021-23
- Plex technology is seeping into the mainstream market
- Free-from claims on sulphates and silicones
 - Graph 13: women's haircare product launches with sulphate and silicone free-from claims, 2020-22
- Hyper-personalisation gives a high-end experience
- Making it easy to "Prove It"
- Making it easy to 'Prove It'
- Hyaluronic acid takes centre stage
- Curly haired women are looking for products made for them
- Food-related scents are on the rise
 - Graph 14: fragrances used most in women's haircare, 2019-23
- Take a playful approach to haircare
- OGX playlist sets the mood for relaxing haircare
- Stronger hair bonds overnight

MARKET SHARE

- Brands stay ahead in haircare, but private label profits from smaller budgets

Retail market share of haircare, by value, 2019-22

- Private label recovers share, but brands retain favour

MARKET SIZE, SEGMENTATION AND FORECAST

- Haircare stays resilient, but growth is slowed by inflation

Retail value sales of haircare, 2018-28

- Haircare is predicted to remain sturdy in the coming years

Market segmentation

- Conditioners stand out in a slow-growing category
- Haircare faces challenges as budget constraints hamper growth
- Danger of downtrading means brands must prove their value

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

Appendix – company shares

- Company shares

About Mintel Reports: Germany

Access our reports now and get the most accurate, credible and powerful data, insights and analysis. Mintel Reports Germany gives you everything you need to know about what German consumers want and why.

In each report, we're analysing the market, new product innovations and the competitive landscape, as well as consumer behaviours across Germany. Our local analysts, supported by our team of global experts then translate it into what it means for you.

What makes us unique?

- ✔ A 360-degree view of German markets
- ✔ Experienced analysts based in Germany
- ✔ Expert-led support from global category experts

How Mintel Reports Germany will help your business grow:

01

Identify future opportunities by understanding what German consumers want and why

02

Make better decisions faster by keeping informed on what's happening across your market

03

See the trends and innovations impacting Germany both on a local and global level

BUY THIS REPORT NOW

€2600.00 | £2195.00 | \$2995.00*

store.mintel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

MINTEL

Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a German licensed market survey agent ([See Research Methodology for more information](#)).

Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

Published by Mintel Group Ltd

www.mintel.com

Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
Germany	+49 211 2409023
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850