

# 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.



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# 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**

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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.

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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

- 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

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- '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

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- 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



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