

## Beauty and Personal Care Retailing - Germany - January 2018

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“There is growing pressure on the market leaders in beauty and personal care retailing in Germany. Online is growing, with Amazon an increasingly important player. There are newcomers in the specialist cosmetics and perfumery sectors. We think that some of the market leaders are already showing signs of this increased pressure.”  
**– Richard Perks, Director of Retail Research**

This report looks at the following areas:

Drugstores dominate the beauty market in Germany. Online is growing fast with Amazon a long way ahead among the pureplayers. The specialist drugstores have outperformed the retail sector as a whole since 2013, the year after Schlecker closed down, and we think that partly reflects a recovery of Schlecker's market share.

But in 2017 the specialists lost share of all retail sales and we are concerned that the weakness reflects the problems of maturity allied to a number of newcomers in addition to the rise of Amazon. So we are cautious about the prospects for the drugstore sector and we feel that some of the market leaders may already be showing signs of the pressure.

**BUY THIS  
REPORT NOW**

**VISIT:**  
store.mintel.com

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
reports@mintel.com

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Beauty and Personal Care Retailing - Germany - January 2018

**Report Price:** £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know  
Areas covered in this report

### Executive Summary

The market  
Spending and inflation  
Figure 1: Germany: spending on personal care products as % all consumer spending 2011-17  
Figure 2: Germany: consumer price inflation on personal care products and services, annual % change, January 2016-November 2017  
Sector size and forecast  
Figure 3: Germany: cosmetics and perfumery retailers' sales as % all non-food retailers' sales, 2012-17  
Channels of distribution  
Figure 4: Germany: estimated channels of distribution for beauty and personal care products, 2017  
Companies and brands  
Drugstores dominant  
Market shares  
Figure 5: Germany leading specialists' shares of all cosmetics and perfumery specialists' sales, 2017  
Online  
The consumer  
Beauty and personal care products purchased  
Figure 6: Germany: BPC products bought in the last 12 months, November 2017  
Online and in-store shopping for beauty and personal care products  
Figure 7: Germany: in-store vs online shoppers for beauty and personal care products, November 2017  
Where beauty and personal care products are purchased  
Figure 8: Germany: where beauty and personal care products were purchased, November 2017  
Attitudes to buying beauty and personal care products  
Figure 9: Germany: attitudes to buying beauty and personal care products, November 2017  
What we think

### Issues and Insights

Is there a crisis building in the drugstore sector?  
The facts  
What it means  
Just how big a challenge is online?  
The facts  
The implications

### The Market – What You Need to Know

Personal care spending losing share of all spending

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)  
**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Beauty and Personal Care Retailing - Germany - January 2018

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Signs that the drugstore sector is going ex-growth

Inflation above average

Drugstores by far the biggest players

## Consumer Spending

Figure 10: Germany: consumer spending on beauty and personal care (incl. VAT), 2012-17

## Product Market Breakdown

Figure 11: Germany: main beauty and personal care markets, spending (incl. VAT) 2012-17

Figure 12: Germany: main beauty and personal care markets, forecast spending (incl. VAT) 2018-21

## Sector Size and Forecast

Drugstores gaining share

Figure 13: Germany: health & beauty specialists, sales (excl. VAT), 2012-17

Figure 14: Germany: health & beauty specialists, sales forecasts, excl. VAT, 2018-22

## Inflation

Figure 15: Germany: consumer prices of personal care items, annual % change, 2012-17

Figure 16: Germany: consumer price inflation on personal care products and services, annual % change, January 2016-November 2017

## Channels of Distribution

Specialists dominant

Department stores struggling

Supermarkets not a major force

Online and other non-store

Figure 17: Germany: estimated channels of distribution for spending on beauty and personal care products, 2017

## Companies and Brands – What You Need to Know

Drugstores dominant

Three retailers share 85% of the market

Online takes 7% of the market

## Leading Players

Drugstores dominant

Specialists growing as well.

Figure 18: Germany: leading beauty specialists, sales, excl. VAT, 2013-17

Figure 19: Germany: leading beauty specialists, outlets, 2013-17

Figure 20: Germany: leading beauty specialists, sales per outlet, 2013-17

## Market Shares

Figure 21: Germany: leading specialists' shares of all beauty and personal care specialists' sales, 2013-17

## Online

Online usage

Shopping online

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Beauty and Personal Care Retailing - Germany - January 2018

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 22: Germany: online buyers in last 12 months in key sectors, 2011-17

Online sales and leading online players

## The Consumer – What You Need to Know

Almost everyone beauty and personal care products

Almost all purchasers buy at least something instore.

Drugstores the most used retailers

Attitudes to buying beauty and personal care products

## Beauty and Personal Care Products Purchased

Beauty and personal care products widely bought.

Figure 23: Germany: BPC products bought in the last 12 months, November 2017

Figure 24: Germany: BPC products bought in the last 12 months, by gender, November 2017

## Online and In-Store Shopping for Beauty and Personal Care Products

Figure 25: Germany: in-store vs online shoppers for beauty and personal care products, November 2017

Figure 26: Germany: profile of online and in-store buyers of beauty and personal care products, November 2017

## Where Beauty and Personal Care Products Are Purchased

Figure 27: Germany: where beauty and personal care products were purchased, November 2017

Customer profiles

Figure 28: Germany: usage of retailers for buying beauty and personal care products, by average age and income, November 2017

Where people shopped and what they bought

Products and drugstores

Figure 29: Germany: purchasers of BPC products by drugstores and specialists, November 2017

Products and other retailers

Figure 30: Germany: purchasers of BPC products by food retailer, department store and pharmacies, November 2017

## Attitudes to Buying Beauty and Personal Care Products

Figure 31: Germany: attitudes to shopping for beauty products, November 2017

Figure 32: Germany: profile of those agreeing with the attitude statements, November 2017

Attitudes to buying beauty and personal care products by shops used

Figure 33: Germany: attitudes to buying beauty products by retailers used, November 2017

## Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Data sources

## The Body Shop

What we think

Distinct USP suffered under the weight of L'Oréal ownership

Mobile-first e-commerce platform roll-out

Shop-in-shop deal with El Corte Inglés an opportunity to attract more customers

Company background

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Beauty and Personal Care Retailing - Germany - January 2018

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Company performance

Figure 34: The Body Shop - Retail sales: Group financial performance, 2012-16

Figure 35: The Body Shop: Estimated UK sales performance, 2012-16

Figure 36: The Body Shop - Retail Sales: Estimated outlet data, 2012-16

### Retail offering

#### dm-Drogerie Markt

##### What we think

Online

Stores and investment

Company background

##### Company performance

Figure 37: dm-Drogerie Markt: group sales performance, 2012/13-2016/17

Figure 38: dm-Drogerie Markt: outlet data, 2012/13-2016/17

### Retail offering

#### Douglas Group

##### What we think

Strengthening market position in Spain and Italy

Transforming the online beauty shopping experience

Enhanced loyalty card to win new customers

In-store events to help drive footfall in German shops

Targeting men with new skincare products range and dedicated in-store spaces

Company background

##### Company performance

Figure 39: Douglas Group: group sales performance, 2012/13-2016/17

Figure 40: Douglas Group: estimated outlet data, 2012/13-2016/17

### Retail offering

#### Kiko Milano

##### What we think

20-year celebration leads to collaboration with Vogue Italia

KikoID opens in Milan

#kikotrendsetters

New CEO

Company background

##### Company performance

Figure 41: Kiko Milano, Group sales performance, 2012-17

Figure 42: Kiko Milano, estimated outlet data, 2012-17

### Retail offering

#### Lush Retail

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Beauty and Personal Care Retailing - Germany - January 2018

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## What we think

Bigger and better shops

New app and virtual shopping assistant to boost customer experience

Expanded payment option with Bitcoin digital currency

Company background

Company performance

Figure 43: Lush Retail Ltd: Group financial performance, 2012/13-2016/17

Figure 44: Lush Retail Ltd: Outlet data, 2012/13-2016/17

Retail offering

## Müller

## What we think

Looking for sales growth opportunities outside Germany

Demand for natural cosmetics fuelling sales growth

Non-beauty offering dragging down total sales

Company background

Company performance

Figure 45: Müller: group sales performance, 2012/13-2016/17

Figure 46: Müller: outlet data and estimated sales per outlet, 2012/13-2016/17

Retail offering

## Rossmann

## What we think

Expanding own brand and exclusives to give differentiation

Using influencers to increase appeal to younger buyers

Online proves a challenge

What next?

Company background

Company performance

Figure 47: Rossmann: Group sales performance, 2013-17

Figure 48: Rossmann: Outlet data, 2013-17

Retail offering

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)