

Personal Accessories in Germany

March 2024

Table of Contents

EXECUTIVE SUMMARY

Personal accessories in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for personal accessories?

MARKET DATA

Table 1 - Sales of Personal Accessories by Category: Volume 2018-2023

Table 2 - Sales of Personal Accessories by Category: Value 2018-2023

Table 3 - Sales of Personal Accessories by Category: % Volume Growth 2018-2023

Table 4 - Sales of Personal Accessories by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Personal Accessories: % Value 2019-2023

Table 6 - LBN Brand Shares of Personal Accessories: % Value 2020-2023

Table 7 - Distribution of Personal Accessories by Format: % Value 2018-2023

Table 8 - Forecast Sales of Personal Accessories by Category: Volume 2023-2028

Table 9 - Forecast Sales of Personal Accessories by Category: Value 2023-2028

Table 10 - Forecast Sales of Personal Accessories by Category: % Volume Growth 2023-2028

Table 11 - Forecast Sales of Personal Accessories by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Bags and Luggage in Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bags and luggage continues to see slow growth in 2023, amid economic uncertainty

Luxury brands continue growing, as consumers look for quality over quantity

Online channel sees a slight decrease as physical stores reopen

PROSPECTS AND OPPORTUNITIES

Personalisation in bags will encourage consumers to be creative

Private label to continue growing in bags and luggage

Sustainability and social values are taken more into consideration than ever before

CATEGORY DATA

Table 12 - Sales of Bags and Luggage by Category: Volume 2018-2023

Table 13 - Sales of Bags and Luggage by Category: Value 2018-2023

Table 14 - Sales of Bags and Luggage by Category: % Volume Growth 2018-2023

Table 15 - Sales of Bags and Luggage by Category: % Value Growth 2018-2023

Table 16 - Sales of Luggage by Type: % Value 2018-2023

Table 17 - NBO Company Shares of Bags and Luggage: % Value 2019-2023

Table 18 - LBN Brand Shares of Bags and Luggage: % Value 2020-2023

Table 19 - Distribution of Bags and Luggage by Format: % Value 2018-2023

Table 20 - Forecast Sales of Bags and Luggage by Category: Volume 2023-2028

Table 21 - Forecast Sales of Bags and Luggage by Category: Value 2023-2028

Table 22 - Forecast Sales of Bags and Luggage by Category: % Volume Growth 2023-2028

Table 23 - Forecast Sales of Bags and Luggage by Category: % Value Growth 2023-2028

Jewellery in Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growth in jewellery sales slows after a double-digit increase in 2022
In-store shopping experience is still unbeatable, despite development of e-commerce
Synthetic diamonds are an affordable and sustainable alternative for jewellery lovers

PROSPECTS AND OPPORTUNITIES

Sustainability and cost driving innovation in jewellery
Jewellery to become more inclusive and diversified
Online second-hand jewellery brings many advantages to vintage jewellery lovers

CATEGORY DATA

Table 24 - Sales of Jewellery by Category: Volume 2018-2023
Table 25 - Sales of Jewellery by Category: Value 2018-2023
Table 26 - Sales of Jewellery by Category: % Volume Growth 2018-2023
Table 27 - Sales of Jewellery by Category: % Value Growth 2018-2023
Table 28 - Sales of Costume Jewellery by Type: % Value 2018-2023
Table 29 - Sales of Fine Jewellery by Type: % Value 2018-2023
Table 30 - Sales of Fine Jewellery by Collection: % Value 2018-2023
Table 31 - Sales of Fine Jewellery by Metal: % Value 2018-2023
Table 32 - NBO Company Shares of Jewellery: % Value 2019-2023
Table 33 - LBN Brand Shares of Jewellery: % Value 2020-2023
Table 34 - Distribution of Jewellery by Format: % Value 2018-2023
Table 35 - Forecast Sales of Jewellery by Category: Volume 2023-2028
Table 36 - Forecast Sales of Jewellery by Category: Value 2023-2028
Table 37 - Forecast Sales of Jewellery by Category: % Volume Growth 2023-2028
Table 38 - Forecast Sales of Jewellery by Category: % Value Growth 2023-2028

Traditional and Connected Watches in Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

Resurgence and evolution in quartz watches
Digital expansion of the pre-owned market
Balance of tradition and technology

PROSPECTS AND OPPORTUNITIES

Generational shift in preferences towards connectivity
Sustainable innovations take centre stage
Quartz watches – blending the best of both worlds

CATEGORY DATA

Table 39 - Sales of Traditional and Connected Watches by Category: Volume 2018-2023
Table 40 - Sales of Traditional and Connected Watches by Category: Value 2018-2023
Table 41 - Sales of Traditional and Connected Watches by Category: % Volume Growth 2018-2023
Table 42 - Sales of Traditional and Connected Watches by Category: % Value Growth 2018-2023
Table 43 - Sales of Traditional Watches by Category: Volume 2018-2023
Table 44 - Sales of Traditional Watches by Category: Value 2018-2023
Table 45 - Sales of Traditional Watches by Category: % Volume Growth 2018-2023
Table 46 - Sales of Traditional Watches by Category: % Value Growth 2018-2023

Table 47 - Sales of Traditional Watches by Price Band: Volume 2018-2023
 Table 48 - Sales of Traditional Watches by Price Band: Value 2018-2023
 Table 49 - Sales of Traditional Watches by Price Band: % Volume Growth 2018-2023
 Table 50 - Sales of Traditional Watches by Price Band: % Value Growth 2018-2023
 Table 51 - Sales of Connected Watches by Category: Volume 2018-2023
 Table 52 - Sales of Connected Watches by Category: Value 2018-2023
 Table 53 - Sales of Connected Watches by Category: % Volume Growth 2018-2023
 Table 54 - Sales of Connected Watches by Category: % Value Growth 2018-2023
 Table 55 - NBO Company Shares of Traditional Watches: % Value 2019-2023
 Table 56 - LBN Brand Shares of Traditional Watches: % Value 2020-2023
 Table 57 - NBO Company Shares of Connected Watches: % Value 2019-2023
 Table 58 - LBN Brand Shares of Connected Watches: % Value 2020-2023
 Table 59 - Distribution of Traditional Watches by Format: % Value 2018-2023
 Table 60 - Distribution of Connected Watches by Format: % Value 2018-2023
 Table 61 - Forecast Sales of Traditional and Connected Watches by Category: Volume 2023-2028
 Table 62 - Forecast Sales of Traditional and Connected Watches by Category: Value 2023-2028
 Table 63 - Forecast Sales of Traditional and Connected Watches by Category: % Volume Growth 2023-2028
 Table 64 - Forecast Sales of Traditional and Connected Watches by Category: % Value Growth 2023-2028
 Table 65 - Forecast Sales of Traditional Watches by Category: Volume 2023-2028
 Table 66 - Forecast Sales of Traditional Watches by Category: Value 2023-2028
 Table 67 - Forecast Sales of Traditional Watches by Category: % Volume Growth 2023-2028
 Table 68 - Forecast Sales of Traditional Watches by Category: % Value Growth 2023-2028
 Table 69 - Forecast Sales of Connected Watches by Category: Volume 2023-2028
 Table 70 - Forecast Sales of Connected Watches by Category: Value 2023-2028
 Table 71 - Forecast Sales of Connected Watches by Category: % Volume Growth 2023-2028
 Table 72 - Forecast Sales of Connected Watches by Category: % Value Growth 2023-2028

Writing Instruments in Germany

KEY DATA FINDINGS

2023 DEVELOPMENTS

A slow recovery from the pandemic crisis
 Polarisation grows within consumers as innovations take place
 Stationary retailers are still the preferred channel of German consumers

PROSPECTS AND OPPORTUNITIES

CSR to gain more importance for increasingly informed consumers
 Inclusivity to become a driver in writing instrument innovations
 E-commerce to continue growing in the forecast period

CATEGORY DATA

Table 73 - Sales of Writing Instruments by Category: Volume 2018-2023
 Table 74 - Sales of Writing Instruments by Category: Value 2018-2023
 Table 75 - Sales of Writing Instruments by Category: % Volume Growth 2018-2023
 Table 76 - Sales of Writing Instruments by Category: % Value Growth 2018-2023
 Table 77 - NBO Company Shares of Writing Instruments: % Value 2019-2023
 Table 78 - LBN Brand Shares of Writing Instruments: % Value 2020-2023
 Table 79 - Distribution of Writing Instruments by Format: % Value 2018-2023
 Table 80 - Forecast Sales of Writing Instruments by Category: Volume 2023-2028
 Table 81 - Forecast Sales of Writing Instruments by Category: Value 2023-2028
 Table 82 - Forecast Sales of Writing Instruments by Category: % Volume Growth 2023-2028
 Table 83 - Forecast Sales of Writing Instruments by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/personal-accessories-in-germany/report.